



OAKLAND UNIFIED  
SCHOOL DISTRICT  
*Community Schools, Thriving Students*

# Proposed 2020 G.O. Bond Measure



**iam** OUSD

June 29, 2020

# Overview

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- Timeline
- Bond Details
- Bond Project List
- Board Discussion and Action



# Timeline

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- October 2019
  - Resolution No. 1920-0168 adopted
- January 2020
  - First voter poll administered
- April 2020
  - FMP completed

# Timeline

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- May 2020
  - FMP approved
  - Second voter poll administered
  - Presentation at Facilities Committee

# Timeline

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- June 2020
  - Presentation at Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee
  - Presentation at Facilities Committee
  - Regional engagements held
  - Community survey administered
  - Board discussion of possible bond measure

# Presentation Overview

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- ✓ Timeline
- ☐ Bond Details
- ☐ Bond Project List
- ☐ Board Discussion and Action



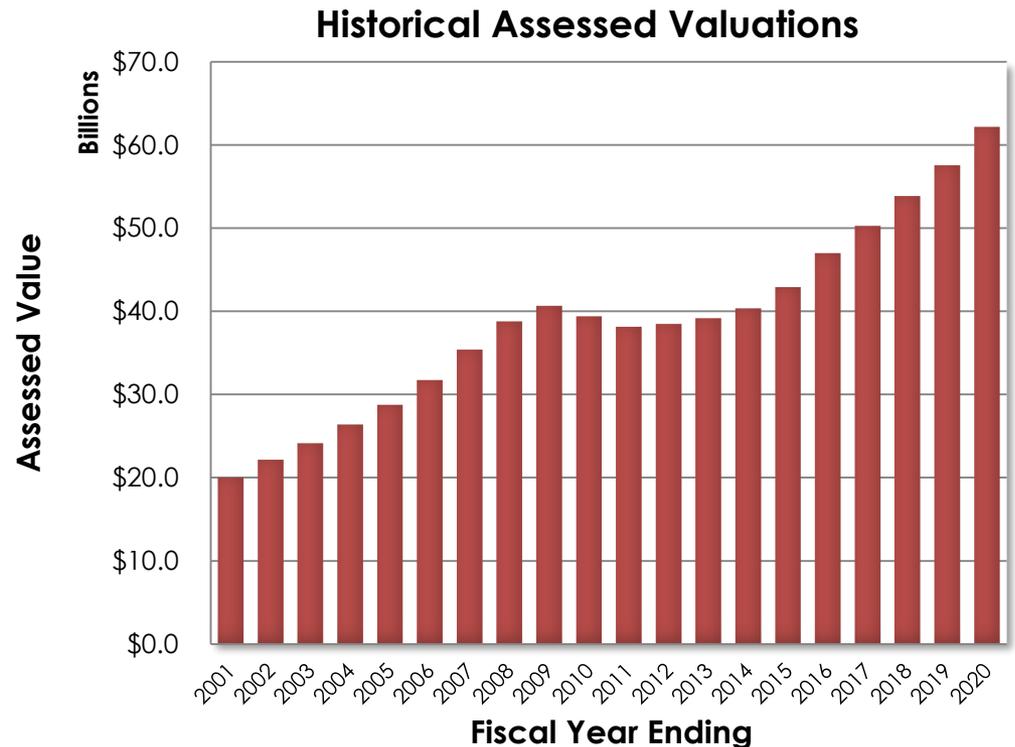
# Assessed Value Projections

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- District is required to obtain reasonable and informed projections of assessed value (AV) that take into consideration projections made by the County Assessor
- County Assessor does not make projections of assessed property valuations
- Resolution declares that the Board finds following projections to be reasonable and informed

# Assessed Value Projections

- District's fiscal year 2019-20 assessed value (AV) is \$62,183,600,505
- District's AV grew on average by over 6.2% per year between 2001 and 2019



# Assessed Value Projections

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- Assessed Value (AV) Projections for Proposed Bond:
  - 3% decline in 2022
  - 3% decline in 2023
  - 1% increase in 2024
  - 1.8% increase in 2025
  - 3.5% increase per year thereafter

# Tax Rate Statement

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- Best estimate of average annual tax rate required to be levied is 5.3 cents per \$100 (\$53 per \$100,000) of AV
- Best estimate of highest tax rate that would be required to be levied to fund this bond issue is 6 cents per \$100 (\$60 per \$100,000) of AV (in fiscal year 2027-28)
- Final fiscal year in which tax is to be levied to fund this bond issue is anticipated to be collected is fiscal year 2049-50
- Best estimate of total debt service (including principal and interest) is approximately \$1,400,000,000

# Accountability Measures

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- Independent Citizens' Oversight Committee
- Annual Performance Audits
- Annual Financial Audits
- Annual Report to Board (usually part of annual budget)

# Presentation Overview

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# Understanding Different Documents

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- Facilities Master Plan:
  - Identifies need through entire District, includes estimated costs, and does not include construction timeline or order
- Bond Measure:
  - Includes list of projects, does not include cost, and does not include construction timeline or order
- Spending Plan:
  - Includes list of projects, includes estimated costs, and includes basic construction timeline or order

# Bond Project List Components

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- Site-Specific Projects
- District-Wide Projects
- Additional language allowing District to adjust to changing needs of projects
  - E.g., inflation to the discovery of asbestos to earthquakes



# Bond Project List Challenge

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- Starting Point: \$3.4 billion (total need based on FMP)
- End Point: \$735 million (bond amount)
- **Only represents approximately one-fifth of need**

# Bond Project List Buckets

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**Greatest Health/Safety Needs**

*Most in need of health and safety improvements*

**Previously Approved Projects**

*Projects previously approved by Board but not completed*

# Bond Project List Buckets

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## Strategic Initiatives

*Best enable District facilities to serve future students*

## Districtwide Health/Safety Improvements

*Similar improvements needed at all school sites*

# Data and Considerations

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- Vote polls
- Facilities Conditions Index (FCI) Ranking
- Regional distribution
- Project type distribution
- Future growth
- Need to generate demand
- Projects not started or completed
- Measures B and J projects
- Equity
- Regional engagements
- Community survey

# Staff Recommendation

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## Site-Specific Projects



- CCPA Expansion
- Claremont MS Kitchen and Cafeteria
- Garfield ES Renovation/Replacement
- Laurel CDC Renovation/Replacement

# Staff Recommendation

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## Site-Specific Projects

- McClymonds HS  
Renovation/Replacement and  
Possible Grade Expansion
- MLA Expansion Consolidation
- Piedmont ES Kitchen
- Roosevelt MS  
Renovation/Replacement

# Staff Recommendation

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## District-Wide Projects

- New Administration and Governance Building
- Develop facilities plan to support alternative and career technical education programs
- Support school expansions and consolidations
- Additional districtwide initiatives
  - Basic facilities repairs, COVID-related improvements, distance learning devices and infrastructure, etc.

# Presentation Overview

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- ✓ Timeline
- ✓ Bond Details
- ✓ Bond Project List
- Board Discussion and Action



# Words of Caution

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- Estimated costs are just that... estimates
  - Some projects are likely to cost more
  - Some projects may cost less
- Contingency amount is important to protect
- Critical to keep total estimated cost (including bond management and contingency) at or under \$735 million

*Ultimate goal is to meet the needs of District students and deliver on promises to voters*

# Suggested Process

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1. Board discusses and agrees on complete list of projects
2. If complete list of projects is different than staff recommendation, General Counsel makes corresponding amendments through track changes with screen share
3. Board votes on amendments and final version

**Additional Slides**

# Alternate Proposal

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## Site-Specific Projects

- CCPA Expansion
- Claremont MS Kitchen and Cafeteria
- **Elmhurst United Modernization**
- Garfield ES Renovation/Replacement
- Laurel CDC Renovation/Replacement

# Alternate Proposal

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## Site-Specific Projects

- McClymonds HS Renovation/Replacement and Possible Grade Expansion
- MLA Expansion Consolidation
- Piedmont ES Kitchen and Cafeteria
- Roosevelt MS Renovation/Replacement

# Alternate Proposal

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## District-Wide Projects

- *New Administration and Governance Building*
- Develop facilities plan to support alternative and career technical education programs
- Support school expansions and consolidations
- Additional districtwide initiatives
  - Basic facilities repairs, COVID-related improvements, distance learning devices and infrastructure, etc.

# Voter Poll Highlights

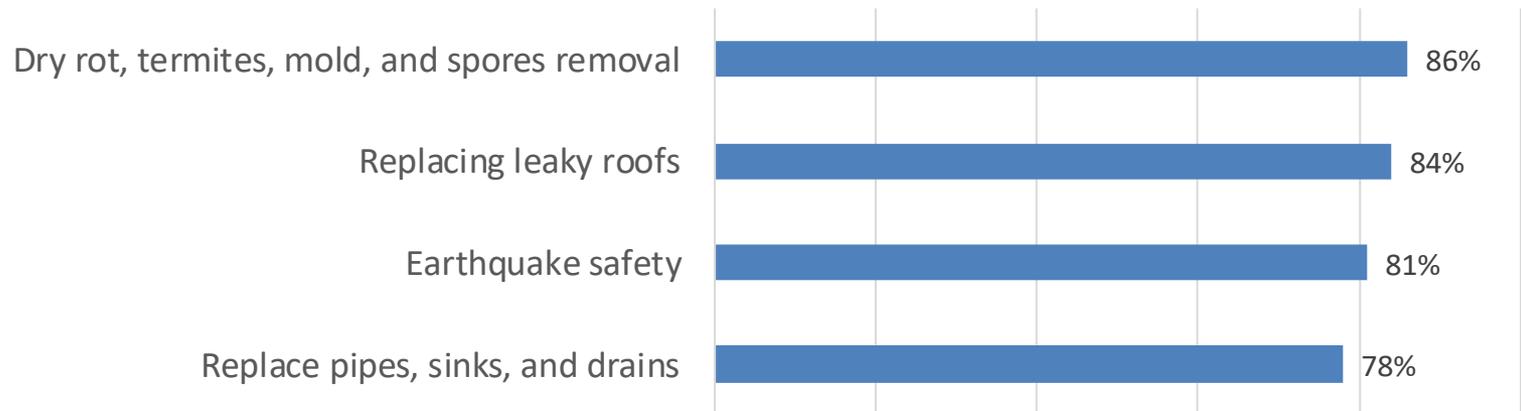


# Voter Poll

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- Basic repairs and safety are the top priority among voters

*% of poll respondents who said it was extremely/very important for the following projects to be included in the bond measure*



# Voter Poll

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- Support for distance learning, career technical education, and child development centers was close behind

*% of poll respondents who said it was extremely/very important for the following projects to be included in the bond measure*



# Voter Poll

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- Affordable housing for students and staff is also of great importance

*% of poll respondents who said it was extremely/very important for the following projects to be included to be included in the bond measure*



# Regional Engagement Highlights



# Regional Engagements

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- Tuesday, June 16: Districts 5, 6, and 7
- Monday, June 22: Districts 1 and 4
- Tuesday, June 23: District 2 and 3

# Regional Engagements

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To have a common understanding of the context in which a new bond is being proposed

To get feedback from stakeholders on the potential bond and priorities for facilities needs

To clarify the decision making process and next steps

# Regional Engagements

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- Significant support for
  - Alternative Education/CTE Hub
  - CCPA
  - McClymonds HS
  - Skyline HS

# Regional Engagements

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- Support also present for
  - Brookfield ES
  - Castlemont HS
  - Claremont MS Kitchen
  - East Oakland Price
  - Elmhurst United MS
  - Living Schoolyards
  - Melrose Leadership Acad.
  - Oakland Tech HS
  - Sankofa United ES
  - Street Academy

# Regional Engagements

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- Common Questions
  - Q: How were the buckets determined?
  - A: The buckets were developed based on the 15 goals, priorities, and themes found in the FMP. Attachment F shows how the FMP goals, priorities, and themes map onto the buckets.

# Regional Engagements

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- Common Questions
  - Q: How was the initial \$1.1 billion in proposed projects determined?
  - A: Staff used the data and considerations listed on slide 18 (except community survey and regional engagements, which weren't available at the time) to place priority projects in each of the four buckets.

# Regional Engagements

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- Common Questions
  - Q: How was the final \$735 million in recommended projects determined?
  - A: Staff used the data and considerations listed on slide 18 to reduce the \$1.1 billion in projects down to \$735 million in projects, with a focus on not overpromising the number of site-specific projects and maximizing, to the extent feasible, the amount of money for district-wide projects.

# Regional Engagements

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- Common Questions
  - Q: How could members of the public suggest projects not on the proposed project list?
  - A: Members of the public had multiple ways to suggest projects: using the chat feature during the regional engagements, speaking at public comment during Facilities Committee meetings and/or Board meetings, and emailing one or more Board members.

# Regional Engagements

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- Common Questions
  - Q: Why weren't more projects included in the community survey?
  - A: Given that the proposed bond can only generate \$735 million, it was important to focus on trade-offs between important projects. While there was ample opportunity to suggest projects not on the proposed project list, adding projects (without removing projects) did not help with the need to prioritize projects.

# Regional Engagements

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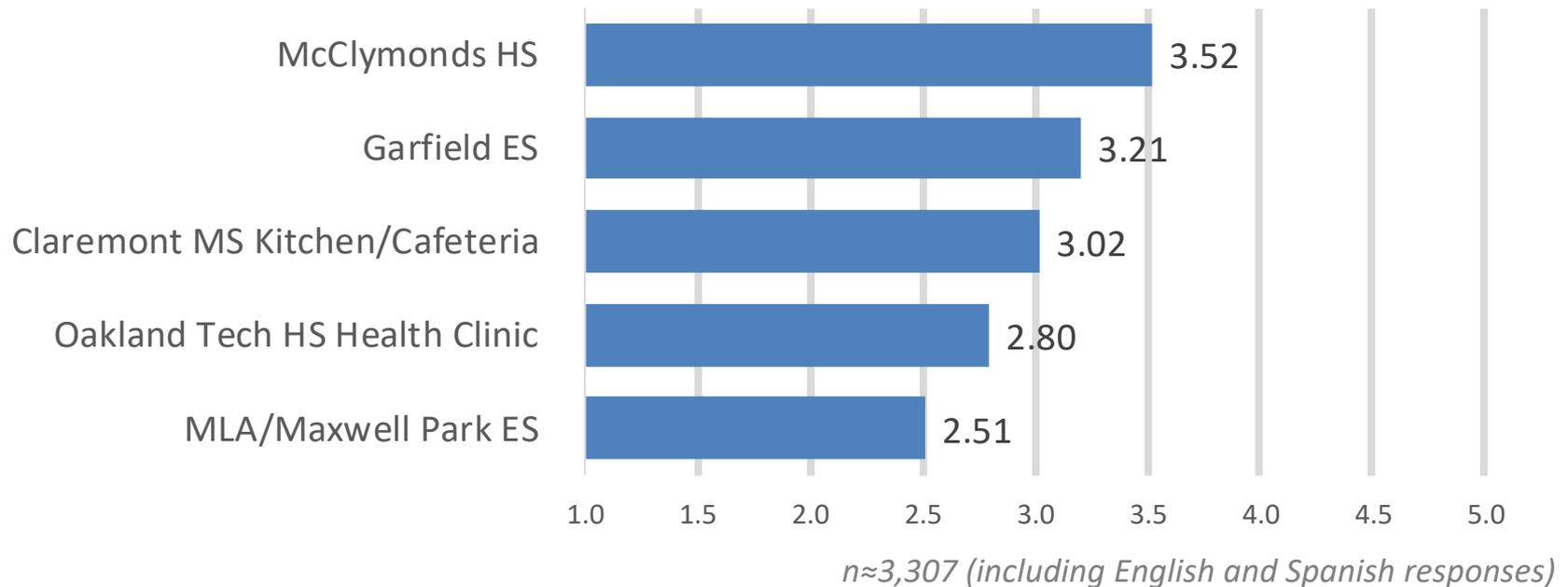
- Common Questions
  - Q: Will bond funds be used to support charter schools?
  - A: No charter school is included in the list of site-specific projects and charter schools are not explicitly called out in the district-wide project list. At the same time, OUSD has a legal obligation under Prop. 39 to provide facilities to a charter if requested. Thus, it is feasible that bond funds could be used to help OUSD comply with its obligations under Prop. 39 as long as the work is consistent with district-wide project list.

# Community Feedback Survey Highlights



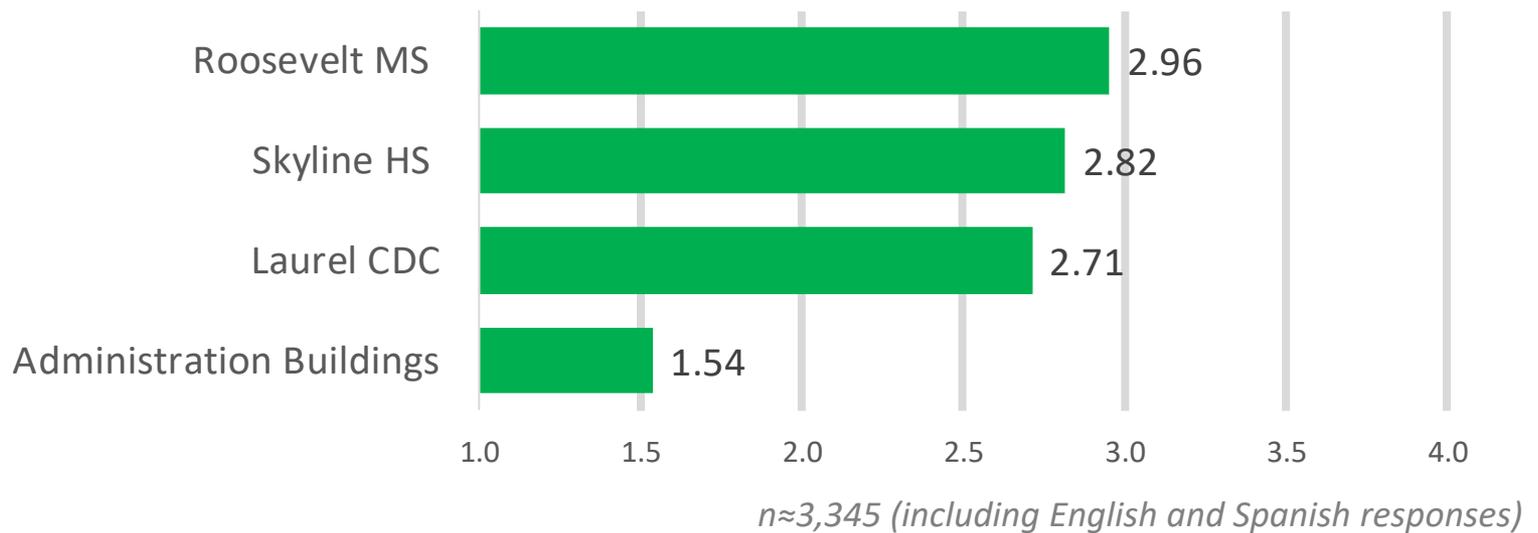
# Community Feedback Survey

## BUCKET: Greatest Health/Safety Need



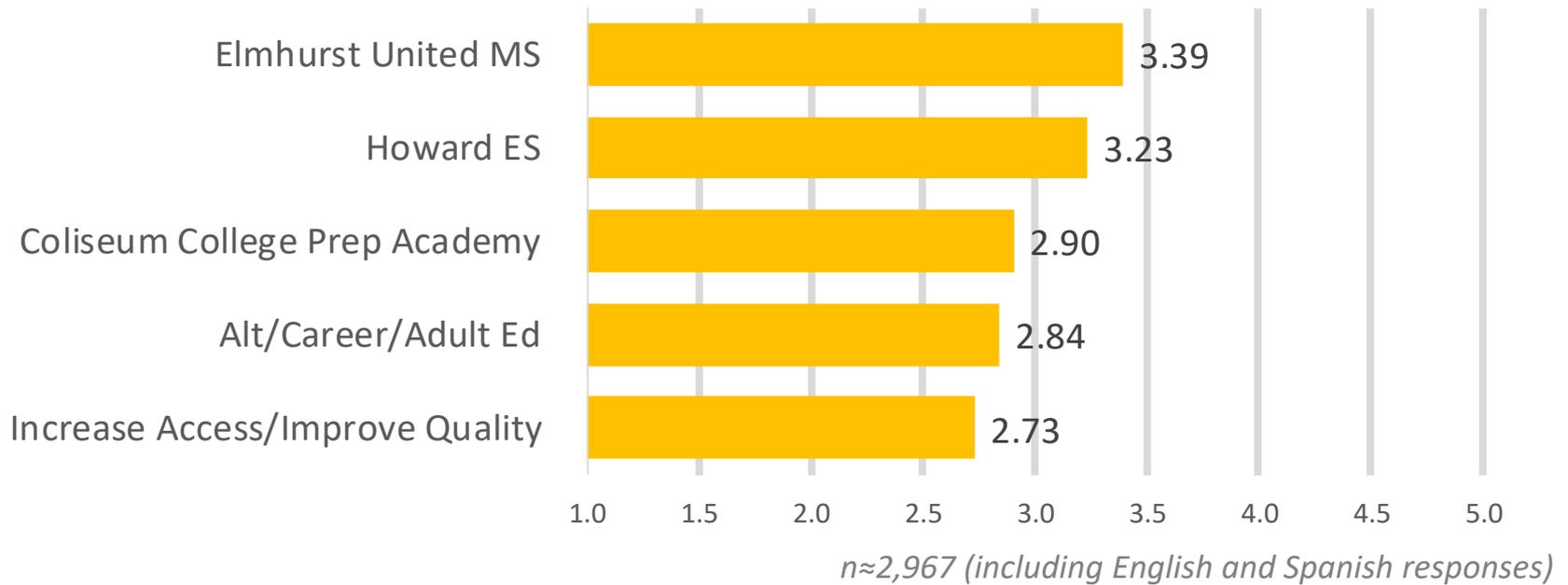
# Community Feedback Survey

## BUCKET: Previously Approved Projects



# Community Feedback Survey

## BUCKET: Strategic Initiatives



# Community Feedback Survey

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- Validity Considerations
  - Over 5,000 responses (in English and Spanish)
  - Anonymous but could only take survey once
  - Most respondents had kids in the schools
  - Respondents were more affluent than City or OUSD average
  - School communities did organize and try to influence survey results
  - Organizing was unlikely to significantly skew results but may have impacted close results



# Quality Schools in Every Neighborhood!



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