

# Asset Management Board Study Session

April 29, 2024



**OAKLAND UNIFIED  
SCHOOL DISTRICT**

*Community Schools, Thriving Students*

**Goal:** By the end of this session, the OUSD Board will have a full understanding of the District's property assets, identify guiding principles, and key actions for staff as the Board develops a plan for OUSD's vacant assets.

## **Agenda**

**Part 1:** Overview of Our Assets

**Part 2:** The Challenge Oakland Faces

**Part 3:** Other District Approaches to Asset Management

**Part 4:** OUSD's Vision for Vacant Properties

## 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.



# An Asset Management Plan aligned to our Strategic Plan



## Ensuring Strong Readers by the Third Grade

Accelerating Citywide Efforts to Guarantee Literacy for all Third Graders



## Supporting Empowered Graduates

Developing Essential Skills to Secure Post-Secondary Success



## Creating Joyful Schools

Reimagining Schools to be Places of Joy, Inclusion, and Beauty



## Growing a Diverse and Stable Staff

Attracting and Retaining Staff Reflective of Oakland's Rich Diversity

Focus Area 4:  
Ensure inspiring learning environments. Facilitating joyful learning spaces from home to school; designing classrooms, learning spaces, and opportunities that value joy and multiple ways of thinking and being; providing spaces for the community to gather and celebrate each other; and expanding outdoor spaces for youth

# Why Now? Purpose

01

Provide an overview of the District's current facilities, uses, and revenue generated by the district assets.

02

Consider past Board actions to address demographic shifts, declining enrollment, and programmatic and operational needs with assets and create a guiding list of principles to use in future asset planning.

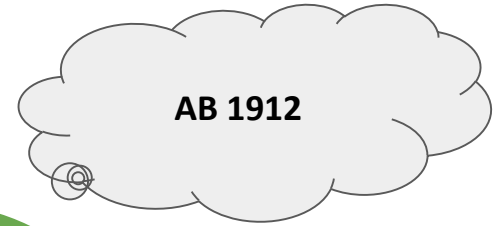
03

Identify how other school Districts are using assets to address strategic priorities that can inform OUSD's use of assets to support the strategic plan.

04

Discuss current vacant properties and provide staff direction on opportunities to optimize district's properties to support the District's vision

# There is tremendous complexity...



## Ask of the Board:

The study session aims to step back from daily school operations and collectively assess the district's asset management strategy, offering guidance and vision with policy implications for the team.



Source: Heifetz, Ronald A., Marty Linsky, and Alexander Grashow. *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World*. Harvard Business Press, 2009.

# Part 1: Overview of OUSD Physical Assets





# What are OUSD Physical Assets?

Any buildings, land, facilities, and infrastructure owned or leased by the district.

These assets provide the physical space and resources necessary for delivering educational programs, supporting administrative functions, and maintaining the overall operation of the district.



# Question #1: How many properties are within OUSD's school system?

A 297

B 108

C 105

D 86

E 77

## Question #2: How much revenue does OUSD bring in from non-charter school leases in the 2023-24 school year.

- A Between \$0-\$249,999 a year
- B Between \$250,000 and \$499,000
- C Between \$500,000-\$1,000,000
- D Greater than \$1,000,000

### Question #3: How much revenue does OUSD bring in from charter leases in the 2023-24 school year.

- A Between \$0-\$249,999 a year
- B Between \$250,000 and \$499,000
- C Between \$500,000-\$1,000,000
- D Greater than \$1,000,000

# Fast Facts: OUSD Facilities Assets

*School Year (SY) 2023-24*

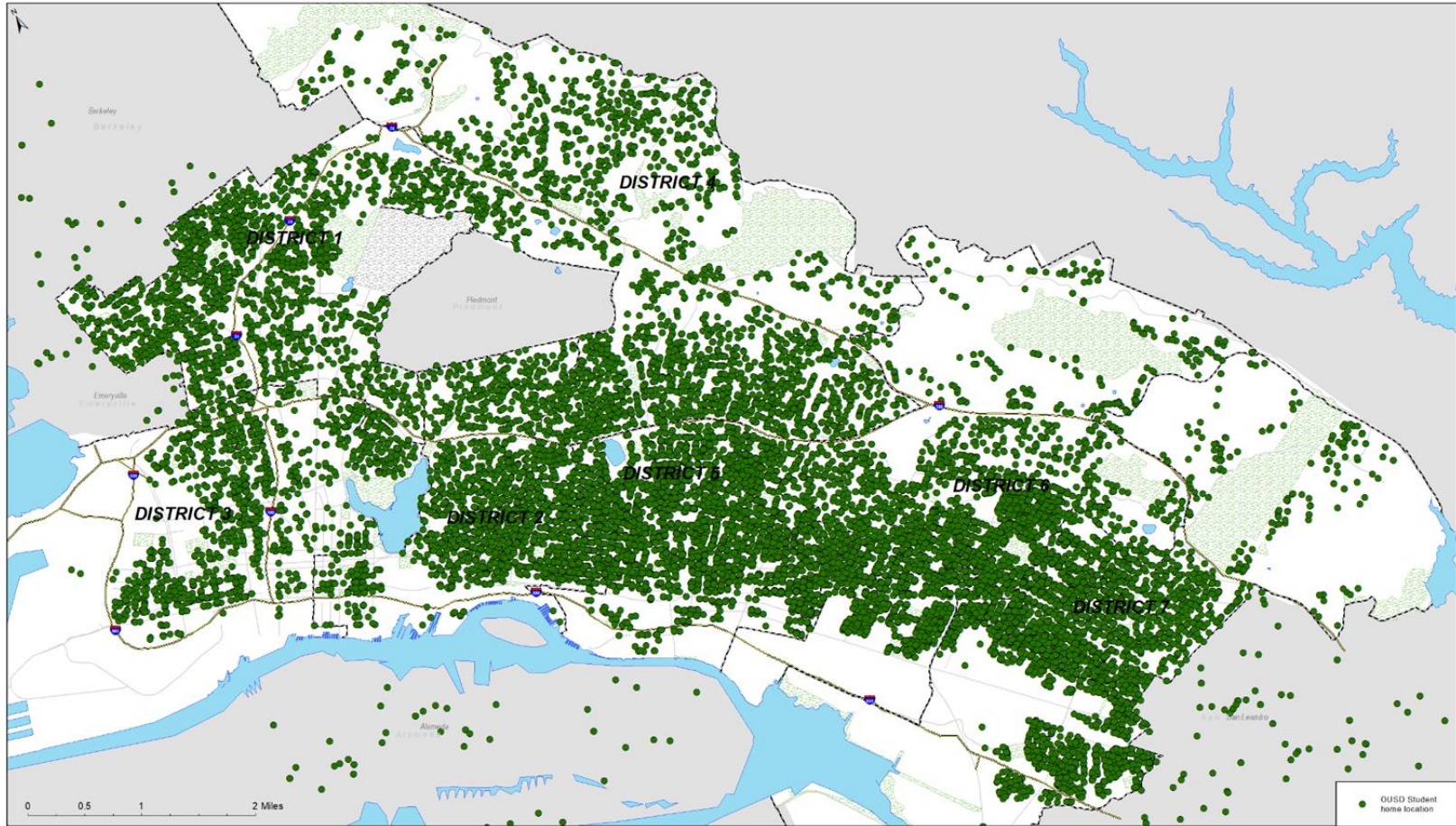


**6M** Building Square Footage (6.5 Oracle Arenas)  
**482** Acres of Land

- 80** District-Run Schools/Programs
- 8** OUSD PreK CDC
- 1** Adult Education/Community Based Organization
- 16** Charters on District Facilities
- 297** District buildings
- 6** Vacant Properties
- 3** Vacant/Leased Properties



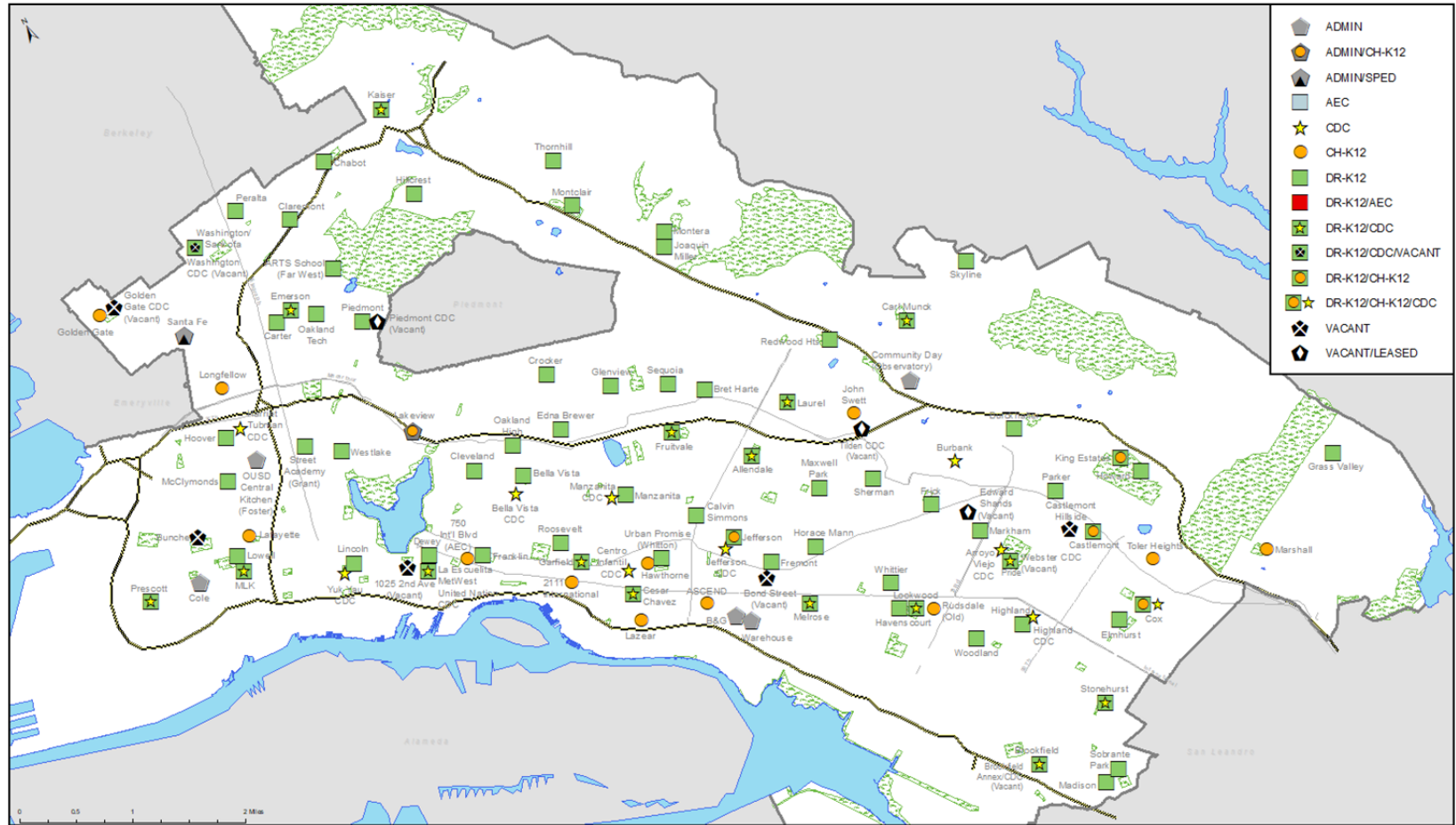
## Where 2023-24 OUSD Students Live



Source: Map is created by OUSD Research, Assessment & Data, April 2024.



# 2023-24: 108 district-owned facility sites/campuses



Source: Map is created by OUSD Research, Assessment & Data, April 2024.

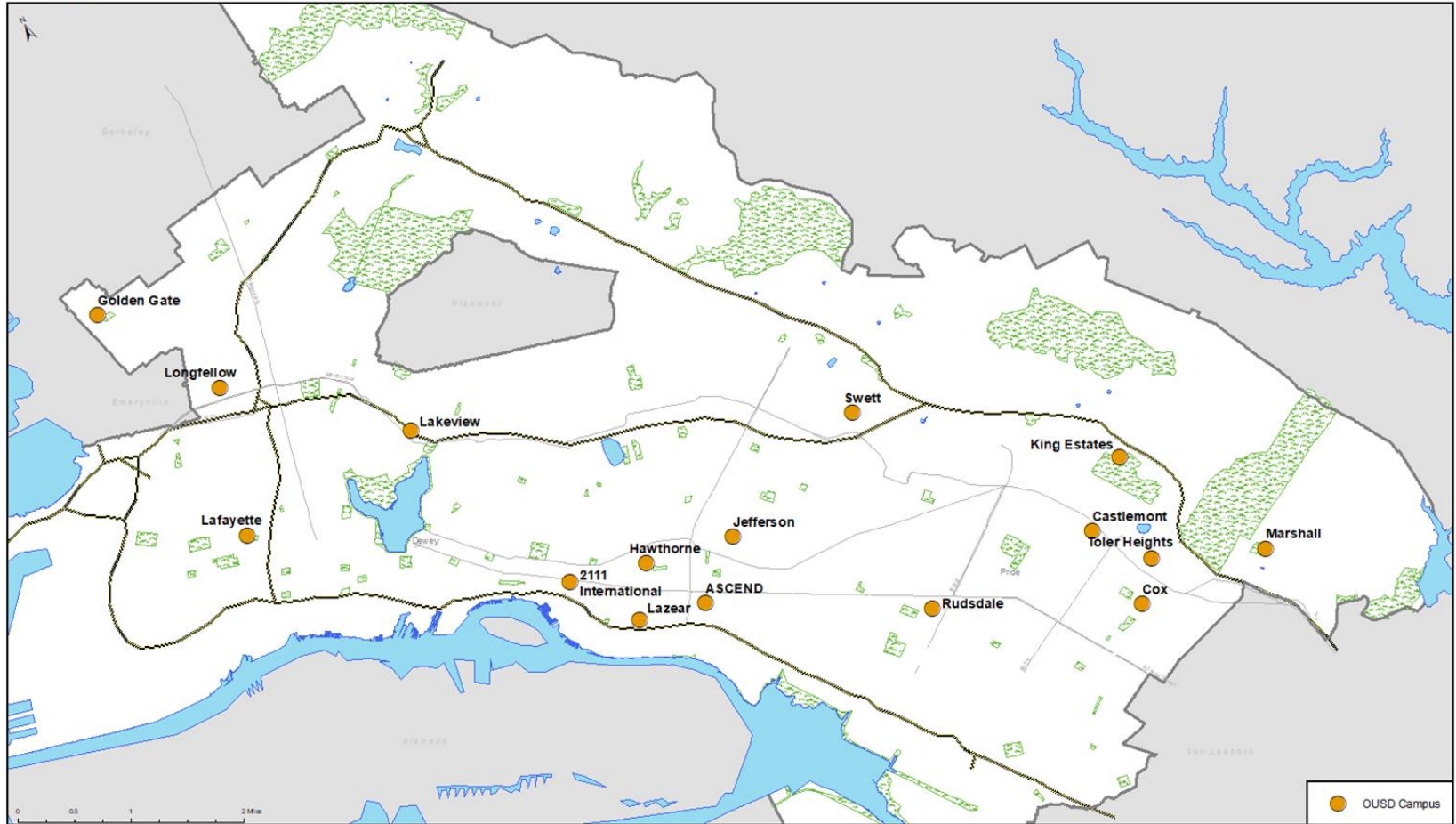
Note: Site and locations are subject to change.







## 2023-24: 16 District-Owned Sites Occupied by Charter Schools

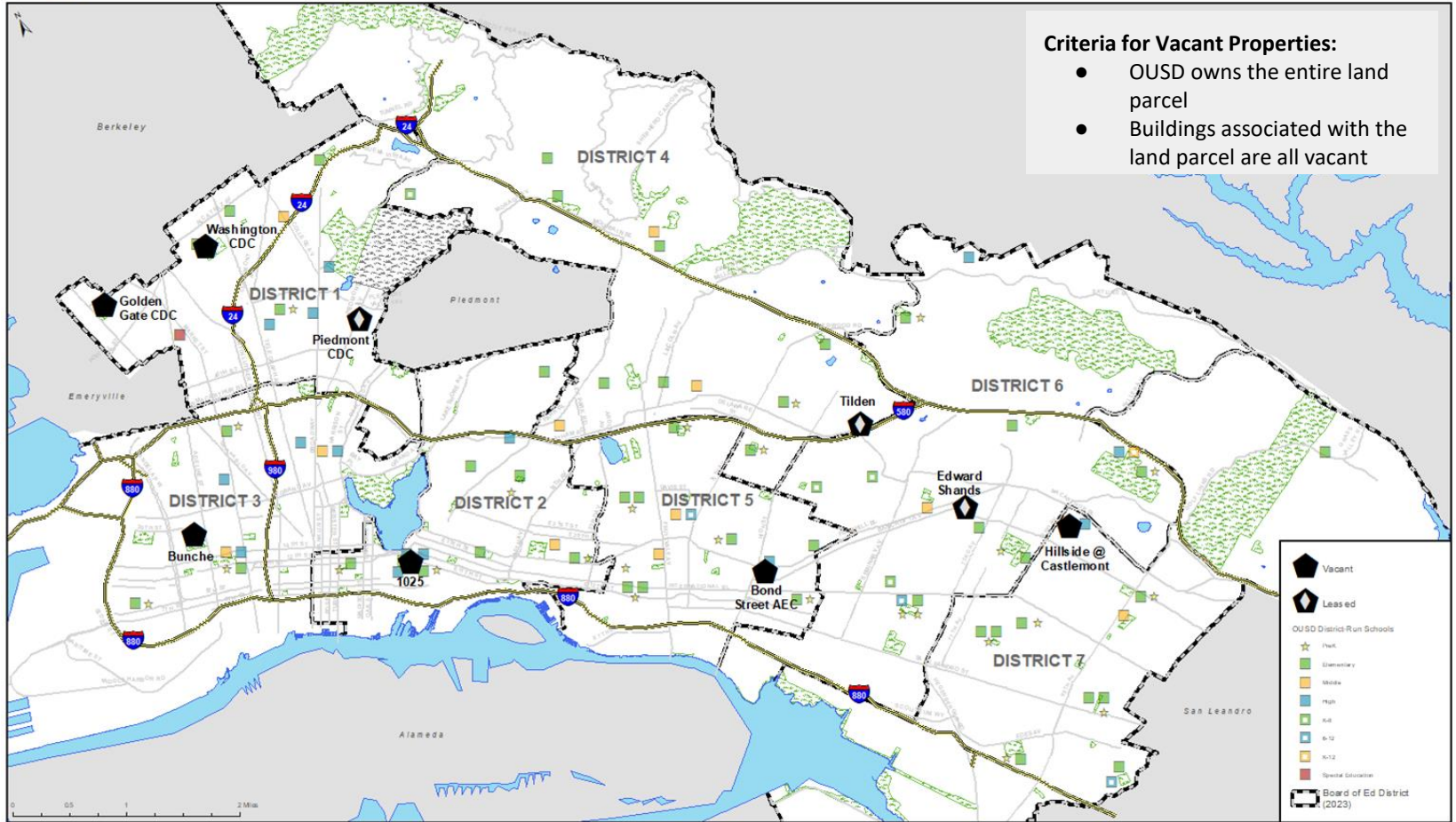


Source: Map is created by OUSD Research, Assessment & Data, April 2024.

Note: Site and locations are subject to change.



## 2023-24 OUSD Facilities: Vacant & Leased Properties\*



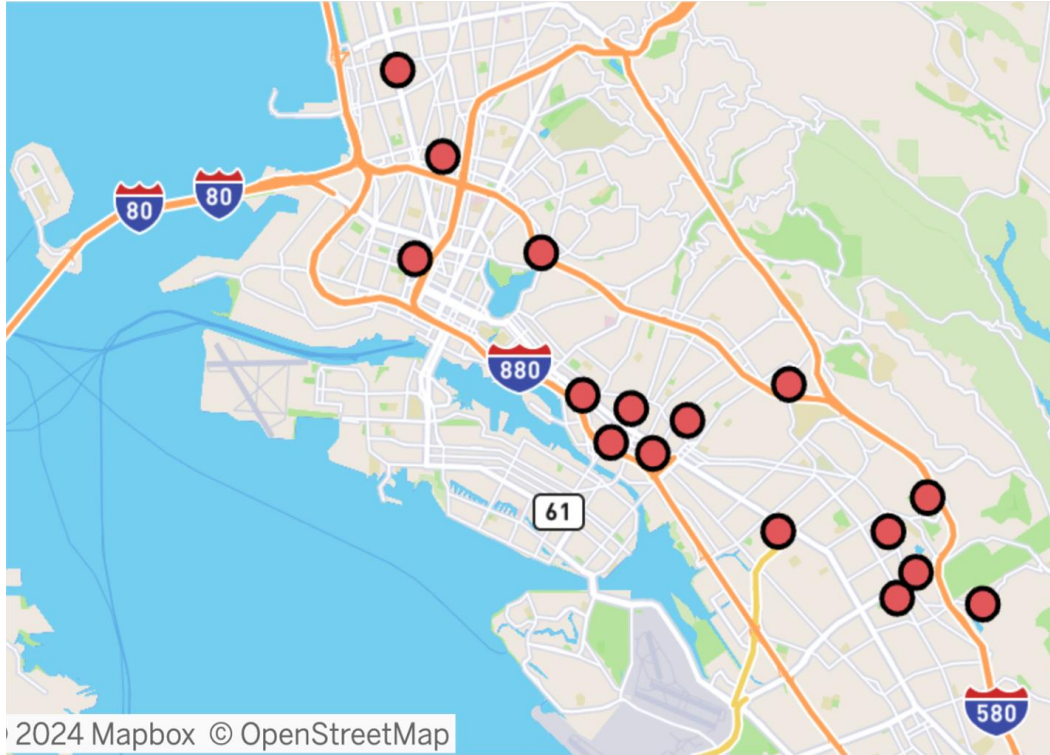
Source: Map is created by OUSD Research, Assessment & Data, April 2024.

Note: Excludes OUSD properties leased to Charter Schools.



# Part 1A: Revenue

# Current Charter School Lease Agreements



● Charter Lease

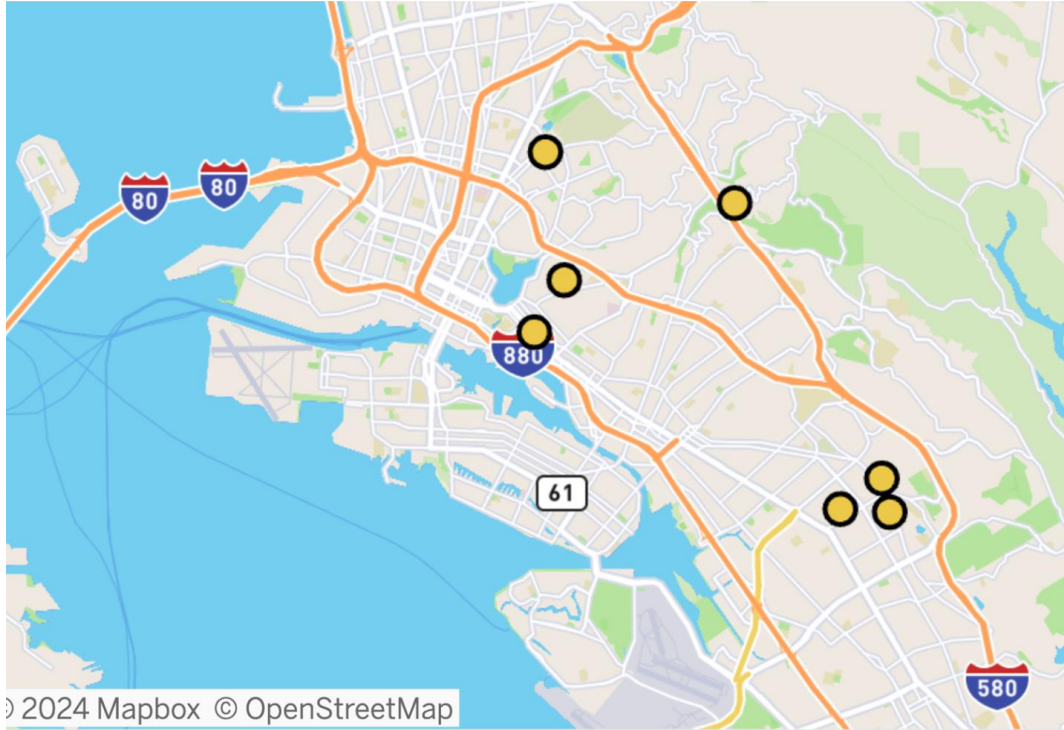
Source: OUSD Leases Dashboard, Public Reports Aggregate Level Data, February 2024.


Notes:

1. Some Charter Lease Term Use Fees are approximate, as they are based on unknown future Prop 39 square foot rate.
2. There will be no rent collections from KIPP Bridge Charter School as they paid upfront their money for constructions of OUSD facility and credited up to \$9.9M.

<b>Count of Charter Leases:</b> 16
<b>Facility Fee, Fiscal Year (FY) 2023-24:</b> \$2,216,705
<b>Facility Fee, FY 2024-25:</b> \$1,297,087
<p><b>Charter Schools:</b>          Achieve Academy, American Indian Public High School, ASCEND, Aspire Berkley Maynard Academy, Bay Area Technology School, Community School for Creative Education (Waldorf), Cox Academy (EFC), East Bay Innovation Academy, Francophone Charter School of Oakland, KIPP Bridge Charter School, Lazear Charter Academy, Learning Without Limits, Leadership Public School Oakland R&amp;D, Oakland Military Institute College Preparatory Academy, Oakland Unity Middle School, Urban Montessori</p>
<p><b>OUSD's Responsibility:</b> Depending on the lease, OUSD may be responsible for routine maintenance or deferred maintenance for the property.</p>

# Current Joint Use Lease Agreements



 Joint Use Lease

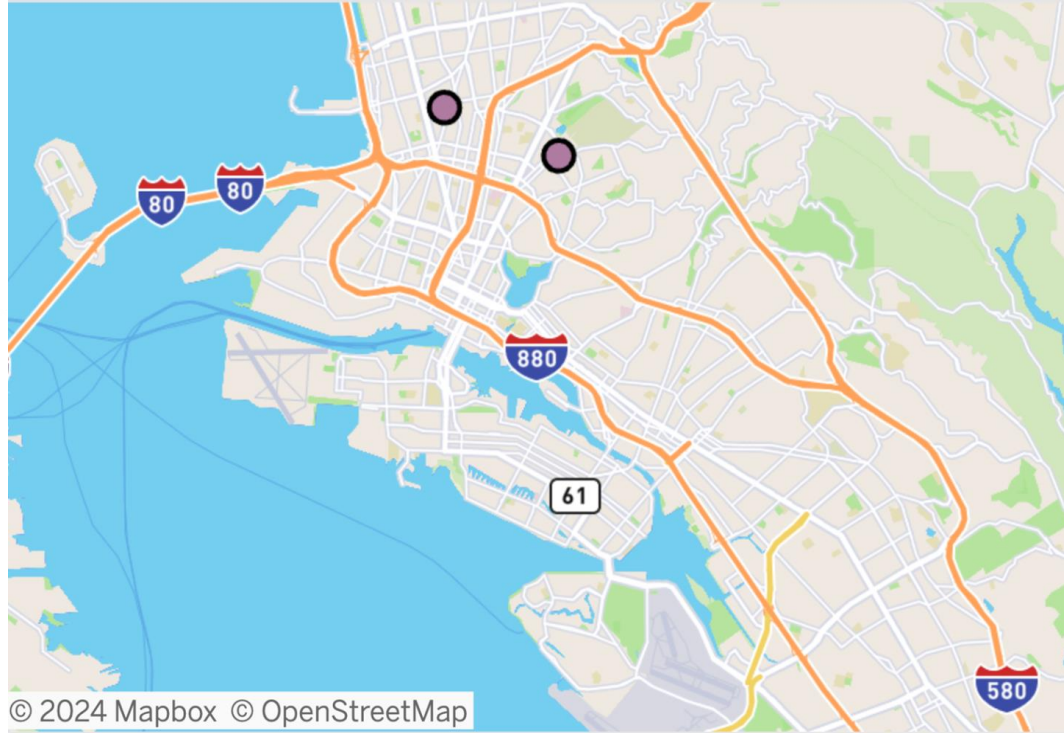
Source: OUSD Leases Dashboard, Public Reports Aggregate Level Data, February 2024.

Note:


1. [23-0342C](#) Board approved lease between OUSD and the Roots Community Health Clinic with the annual rent of \$69,380 to begin in SY 2024-25, with annual increases of 5% thereafter as set forth in the Agreement.
2. Includes lease with Jewish Community Center of the East Bay, at no cost, and provides services before and after school program.

<b>Count of Joint Use Leases:</b> 7	
<b>Estimated Facility Fee, FY 2023-24:</b> \$161,800	
<b>Estimated Facility Fee, FY 2024-25:</b> \$237,794	
<b>OUSD Facility</b> 750 International Blvd	<b>Program</b> Alameda County Office of Education (ACOE Program)
Jewish Community Center of the East Bay	Joaquin Miller and Cleveland Elementary Schools
Piedmont Elementary School	Oakland Public Library
Castlemont High School	Kidango
Webster CDC	Unity Council Infant Toddler Program
Parker Resource Center	Roots Community Health Clinic <sup>1</sup>

# Joint Occupancy Lease Agreements



<b>Count of Joint Use Leases: 2</b>	
<b>Estimated Facility Fee, FY 2023-24: \$48,000</b>	
<b>Estimated Facility Fee, FY 2024-25: \$48,000</b>	
<b>OUSD Facility</b>	<b>Program</b>
Santa Fe Elementary	West Oakland Medical Therapy Unit <sup>1</sup>
Piedmont CDC	Oakland Public Library <sup>2</sup>

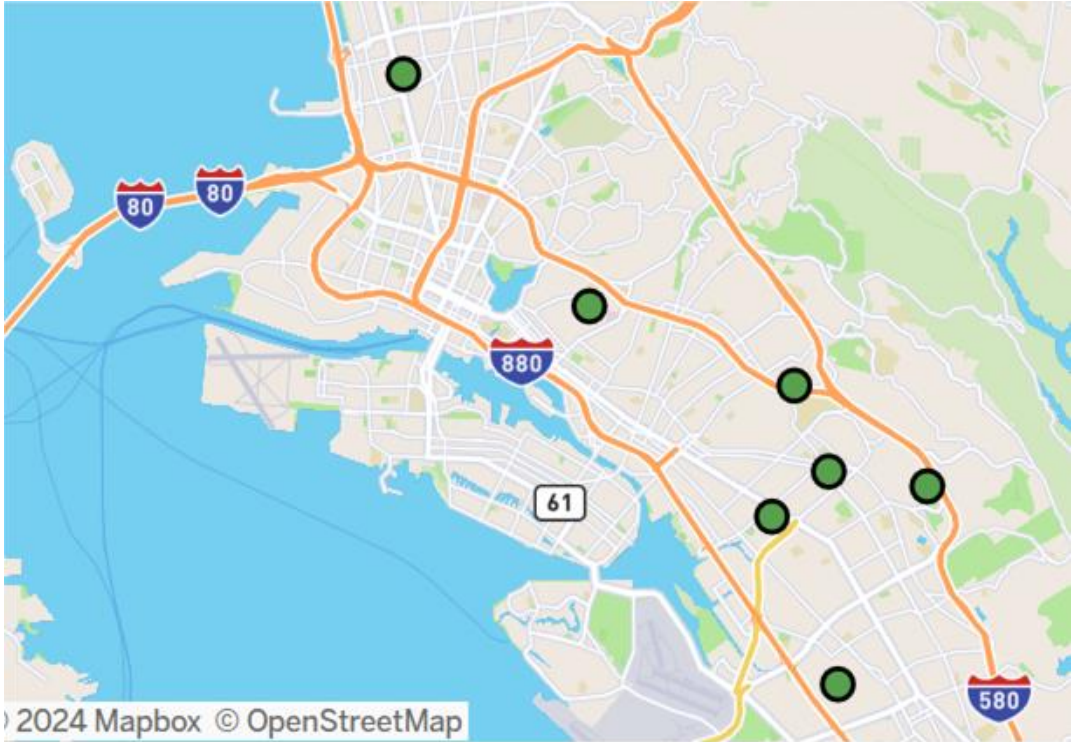
 Joint Occupancy Lease

Source: OUSD Leases Dashboard, Public Reports Aggregate Level Data, February 2024.


Notes:

1. Pursuant to Government Code section 7575, the District is required to provide necessary space and equipment for the provision of occupational therapy and physical therapy in the most efficient and effective manner. This Joint Occupancy Lease does not include a monthly use fee.
2. [17-2493](#) Board approved lease between OUSD and the City of Oakland for City's Use of Existing Modular Building for a Public Library at Piedmont Elementary School.

# Ground Lease Agreements



<b>Count of Ground Use Leases: 7</b>	
<b>Estimated Facility Fee, FY 2023-24: \$170,524.00</b>	
<b>Estimated Facility Fee, FY 2024-25: \$370,820.67</b>	
<b>OUSD Facility</b>	<b>Program</b>
Sobrante Park	Sobrante Mini Park <sup>1</sup>
Bella Vista	Bella Vista Park <sup>1</sup>
Golden Gate Elementary	Recreational Facilities <sup>1</sup>
Lockwood/CCPA	Greenman Field Park <sup>1</sup>
King Estates	Recreational Facilities <sup>1</sup>
Edward Shands	Eagle Construction
Tilden CDC	Eagle Construction

 Ground Lease

Source: OUSD Leases Dashboard, Public Reports Aggregate Level Data, February 2024.

Note: Board approved lease between OUSD and the City of Oakland, for the latter to rent from District for \$1.00 annually, and pursuant to other terms and conditions stated in said lease.



## Part 1B: Expenses



# Facilities Ongoing Operations & Maintenance Needs

*Revenue is ½ of the equation the districts cost of maintaining and operating facilities is an important variable.*

- Estimated costs are based on 2018 facilities inventory and conditions assessment for the **2020 Facilities Master Plan**.
- Includes estimated costs to address deficiencies and lifecycle costs.
- Current **average age of facilities is 75 years**, and lack of investment in infrastructure and building systems has led to increased cost to bring up to date.
- Current market conditions have significantly **increased construction costs**, and are projected to continue to escalate 8-10% per year, as compared to 3% traditionally.
- California Construction Cost Index (CCCI) indicates an **increase of approximately 28%** in cost of construction from 2020 to 2024.

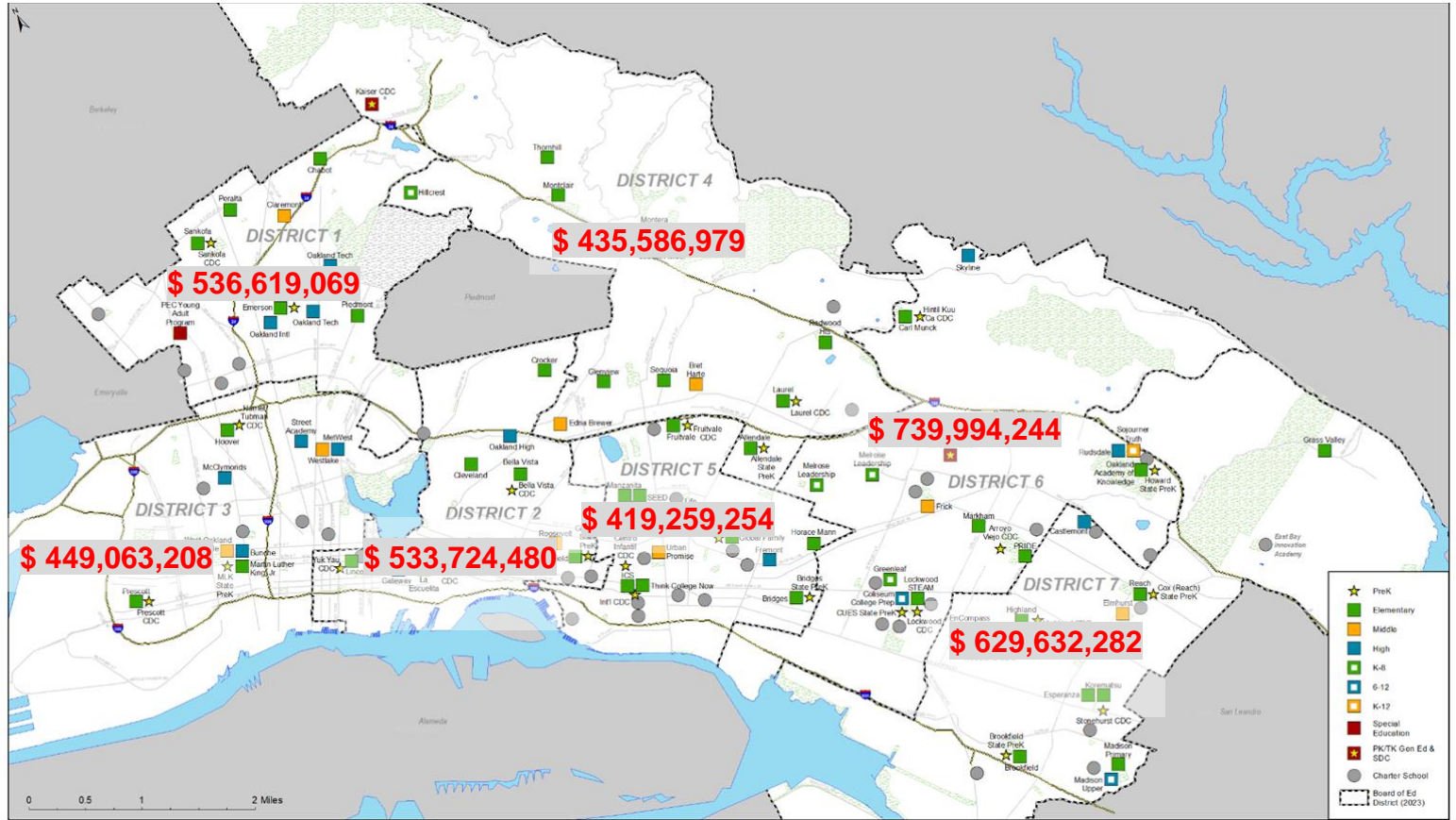
OUSD District	Estimated Cost to Address Facilities Needs (2020)	Estimated Cost to Address Facilities Needs Based on CCCI (2024)
1	\$ 419,233,648	\$ 536,619,069
2	\$ 416,972,250	\$ 533,724,480
3	\$ 350,830,631	\$ 449,063,208
4	\$ 340,302,327	\$ 435,586,979
5	\$ 327,546,292	\$ 419,259,254
6	\$ 578,120,503	\$ 739,994,244
7	\$ 491,900,221	\$ 629,632,282
District Buildings	\$ 205,099,258	\$ 262,527,050
<b>Grand Total</b>	<b>\$ 3,130,005,129</b>	<b>\$ 4,006,406,566</b>

Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.

Note: The estimated costs are based on 2018-19 Facility Assessments and 2020 Facilities Master Plan. Staff is currently in the process of updating the cost estimates to reflect current construction and facility needs.

# Deferred Maintenance Load by Board District



Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.

## Board Discussion:

What are some clarifying questions you have about the district's portfolio of schools and properties?

# Part 2: Challenges of an Evolving District





# Question #3: Which campus has OUSD's oldest physical asset (facility)?

A Prescott Elementary

B Oakland High School

C Lincoln Elementary

D Edna Brewer Middle School

E Oakland Technical High School

# Question #3: Which school was moved to the Whittton campus?

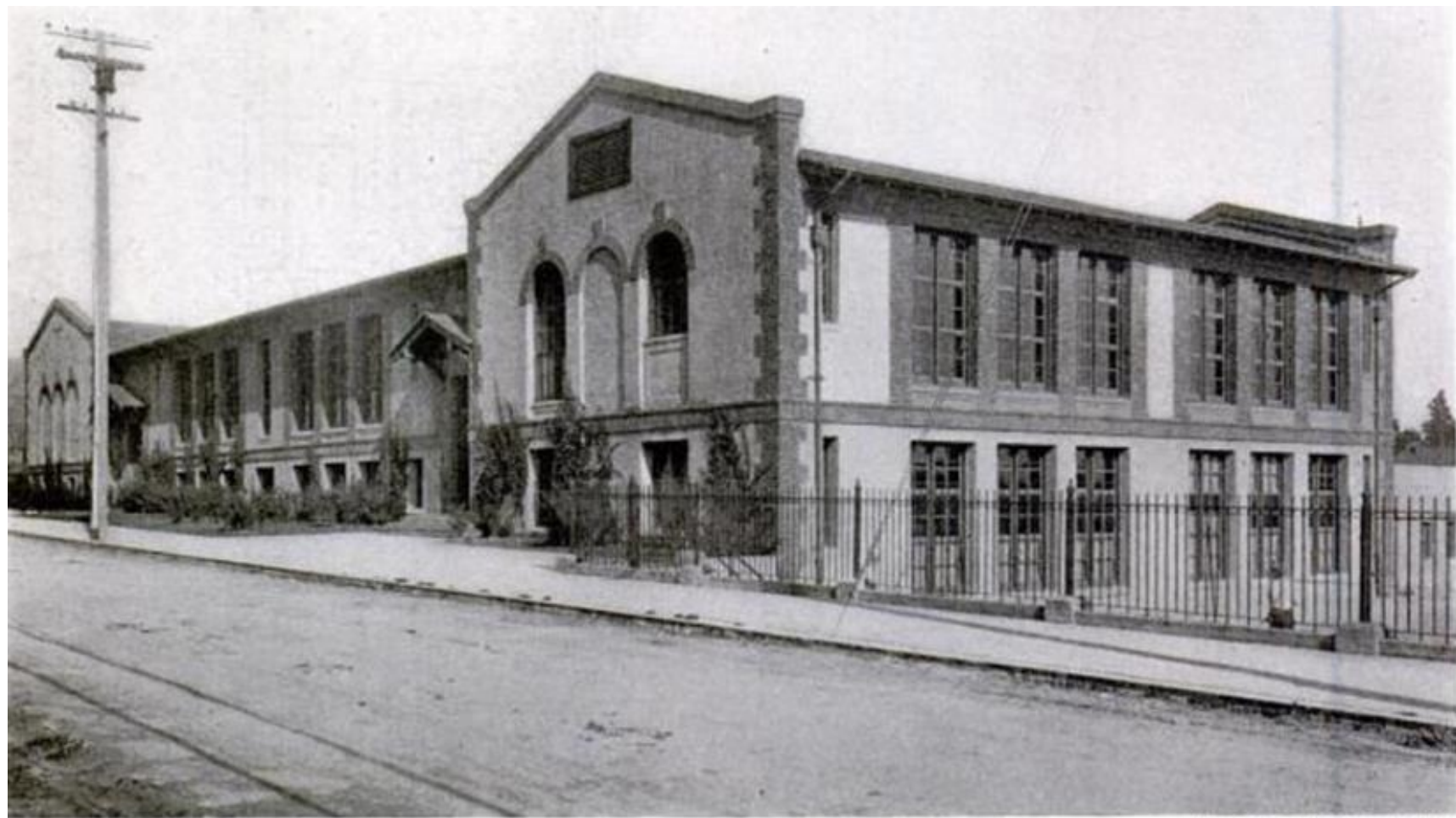
A Lazear Elementary

B Urban Promise Academy

C Achieve Academy

D Global Family


E Hoover Elementary



*Mr. John J. Donnan, Architect.*

FIG. 503. — MCCLESNEY ELEMENTARY SCHOOL, FRONT ELEVATION, OAKLAND, CALIFORNIA.



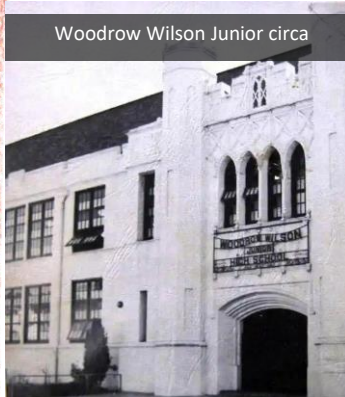


# Case Studies-Decisions of Past OUSD Boards



# Group A: Case Study

# Mosswood Junior High Campus: 100 Years of History



Woodrow Wilson Junior circa



Turf field replacement



Demolition of Woodrow Wilson School from Adrienne Broach

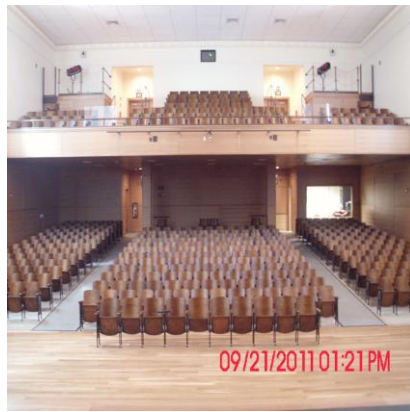
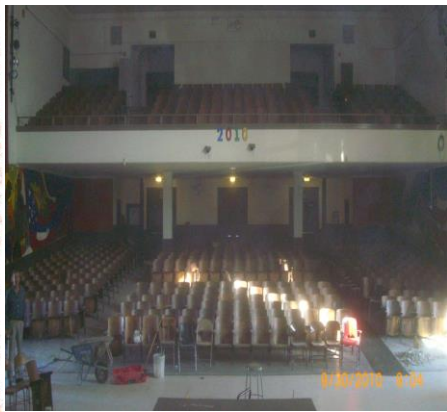
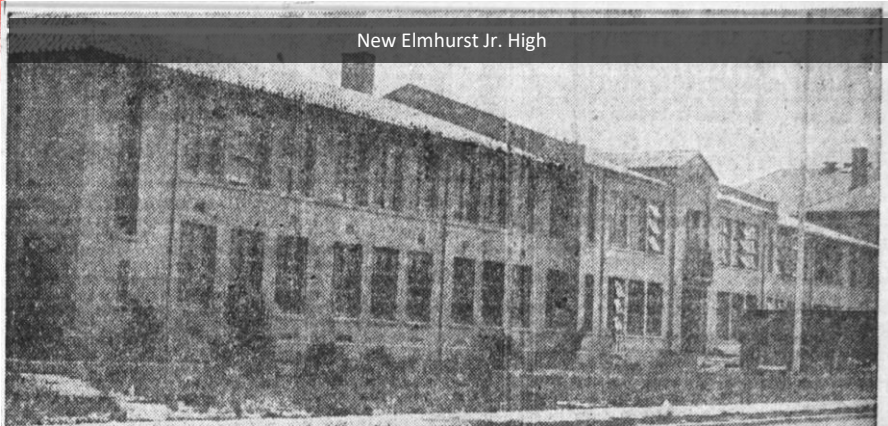


Oakland International High School

## History of Facility and Program Timeline

- 1923** Mosswood Junior High opened and named Woodrow Wilson Junior High the following year.
- 1970** Wilson Junior High is demolished
- 1980-**  
**2004** Verdese Carter Middle School opened in 1980 and ultimately closed in 2004.
- 2004** Modernization project of the Campus
- 2006** The Rickey Henderson Field of Dreams is built on the campus for the Oakland Tech Baseball team.
- 2006** Alternative Education Admin Offices Open
- 2007** Oakland International High School for newcomers opens in North Oakland. Site was used as housing for Peralta Elementary due to arson
- 2009** BayTech Charter is co-located on campus with OIHS
- 2012** BayTech moves to the King Estates campus based on OIHS growth in Newcomer population
- 2017** Oakland International Soccer Field is constructed. Just shy of regulation size.

# New Elmhurst Jr High



Auditorium Modernization - Before and After

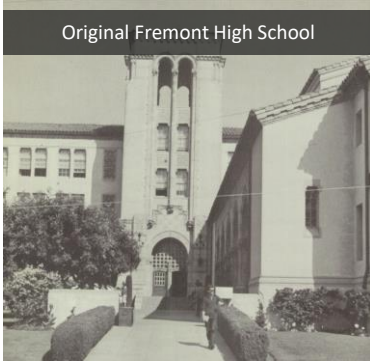
## History of Facility and Program Timeline

- 1927** New Elmhurst Jr. High finishes construction and opens on the site of the former Elmhurst School in the Elmhurst Annex
- 2001** Modernization work begins on buildings which include: roofing improvements, exterior paint, providing internet connection, and adding accessibility to restrooms
- 2006** Elmhurst Middle School closes  
Alliance Academy and Elmhurst Community Prep open as part of the Small Schools Initiative.
- 2007-2010** Modernizations begin on the campus on all buildings. Major projects include roof replacement and major upgrades to the auditorium. Health portable is replaced.
- 2016** New construction of synthetic turf field.
- 2019** Elmhurst Community Prep and Alliance Academy merge to become Elmhurst United Middle School
- 2023** Elmhurst United is currently the 2nd Largest Middle School in Oakland with 761 students



## Group B: Case Study

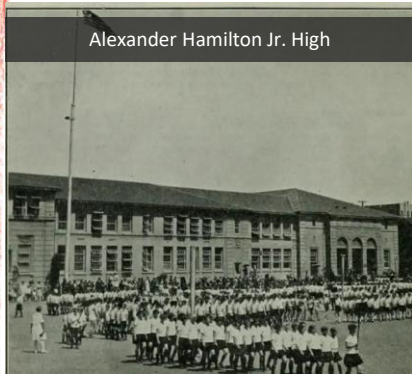
# Fremont High School



## History of Facility and Program Timeline

- 1905** Fremont High School Founded
- 1982** Fremont Launched the 1st California Partnership Academy which is a precursor to Linked Learning
- 1992** Fremont High School develops in "Career Houses" that provide CTE experience to students.
- 1997** Grade Level Confirmation changes from 10-12 to 9-12 welcoming students from Calvin Simmons and Frick
- 2001** Fremont High School begins to small schools with Life Academy moving to 2111 International Blvd.
- 2003** Fremont High School breaks into 5 smaller schools including Youth Empowerment School that is placed on King Estates campus.
- 2014** Fremont High School becomes 1 large comprehensive high school through closure of Small Autonomous Schools.
- 2018** OUSD breaks ground on extensive modernization new modernization project including new sports complex, modernization of 2 story building, new building and development of CTE spaces throughout.

# Alexander Hamilton Junior High



## History of Facility and Program Timeline

- 1922** Construction begins on Alexander Hamilton Jr. High School
- 1948** Construction begins for a school gymnasium
- 1983** School renamed in honor of Calvin Simmons
- 1997** 9th Grade Students move to Fremont High School to ease the overcrowding-Calvin Simmons becomes 6-8 school with 9th grade moving to Fremont
- 2001** Urban Promise Academy launches and students are moved to Whitton Campus. Enrollment at Calvin Simmons 1,345
- 2006** United for Success Academy and Peralta Creek opens. Life Academy moves to Calvin Simmons. Peralta Creek Middle opens then closes 3 years later in 2009.
- 2009** Peralta Creek phases out and closes as Life Academy moves from 2111 International to Calvin Simmons campus. Charter school occupies 2111 International as Field Act doesn't apply to charter school.
- 2012** Construction begins on the Career Tech Science Building for Life Academy middle school expansion to create a 6-12 including, middle school wing, science tech building, modernized library, and soccer field.



# Update: Citywide Enrollment



## Question #2: In the next decade based on new state projections, Oakland's student enrollment is projected to:

A Generally, be flat as families move from the SF Peninsula to East Bay

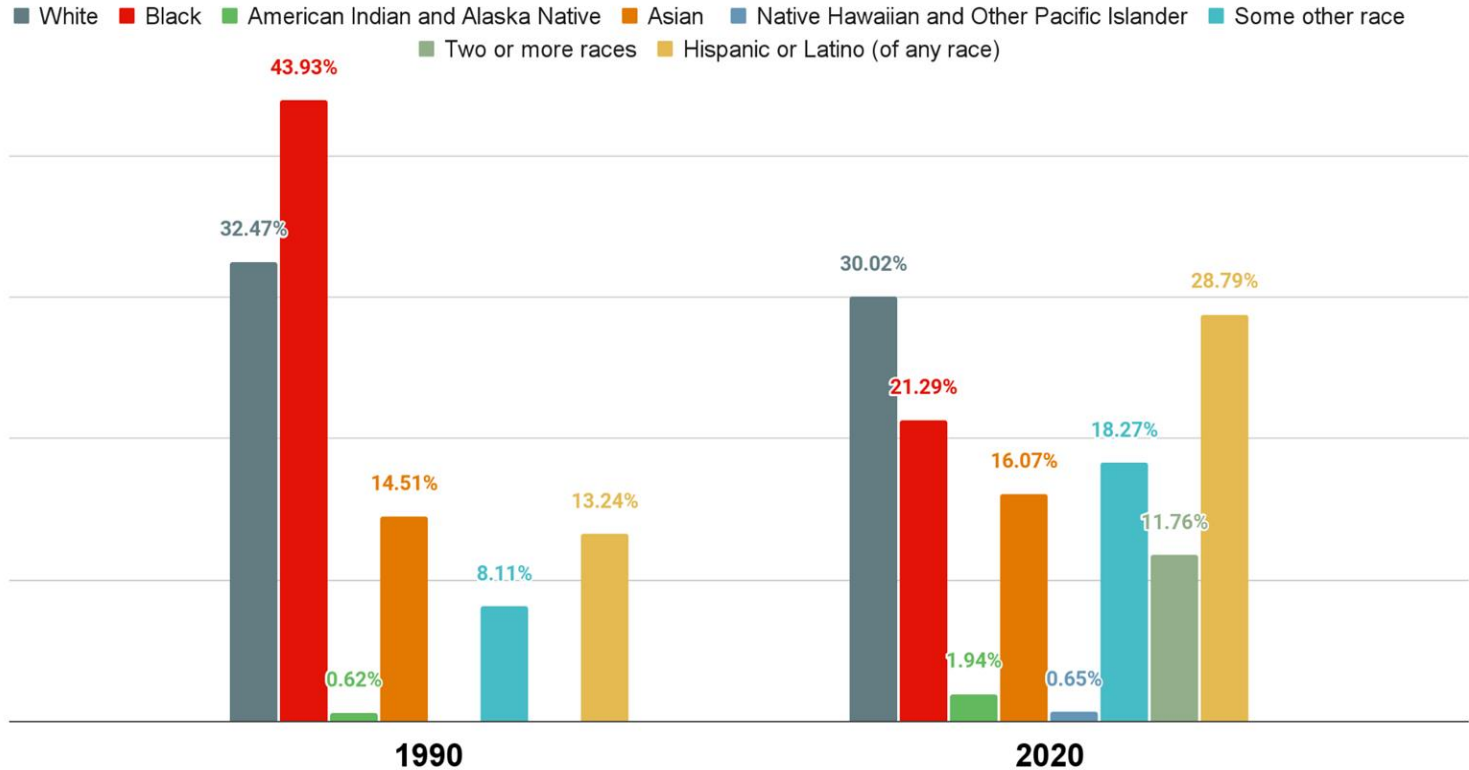
B Decline by 5% or approximately 2,280 students

C Decline by 10% or approximately 4,570 students

D Decline by 15% or approximately 6,850 students

E Decline by 20% or approximately 9,400 students

# Demographic Shifts in Oakland (1990 & 2020)



Sources:

1. Bay Area Census Data, 1990 Census, 2000 Census, 2010 Census.
2. US Census Bureau 2020 profile on Oakland, CA

Notes:

1. Race and ethnicity will not sum up to 100% due to "Hispanic or Latino" being a question of ethnicity separate from race.
2. "Two or more races" was not an option on the 1990 census and does not appear on the chart. "Native Hawaiian and Other Pacific Islander" was not an option on the 1990 census.

# Declining Kindergarten Enrollment

## Historical Aeries TK-12 Enrollment

**Data Source:** [Aeries](#). Grades TK - 12. **Network/School:** All Schools. **Grade(s):** Grade TK, Grade K, Grade 6 and 1 more

**Notes:** Preliminary enrollment data extracted from Aeries SIS immediately on Fall Census Days (first Wednesday of each October). Enrollment data includes only OUSD district-run schools.

For any comments or questions about this dashboard, email [james.tharp@ousd.org](mailto:james.tharp@ousd.org)

View by Ntwk/Sch

District

Select Ntwk/Sch

All Schools

Select Grade(s)

(Multiple values)

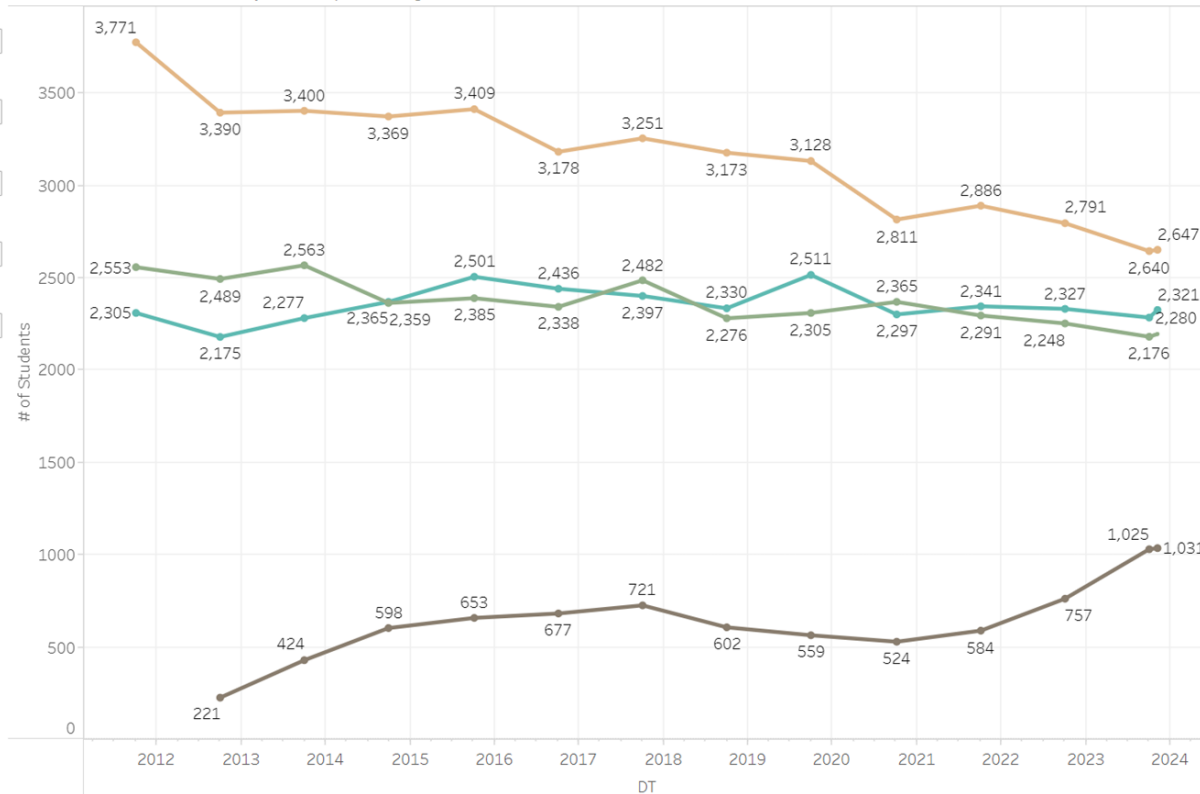
View by Subgroup

Grade

Select Subgroup

(All)

- Grade TK
- Grade K
- Grade 6
- Grade 9



# Comparison on Enrollment as Reported by California Department of Education (CDE)



School District	Percent Change from SY 2022-23 to SY 2032-33
Fontana	14% ↓
Fresno	8% ↓
Moreno Valley	9% ↓
Oakland	20% ↓
Riverside	8% ↓
Santa Ana	24% ↓
San Francisco	16% ↓
Stockton	2% ↓

## Demographic Shifts in Oakland:

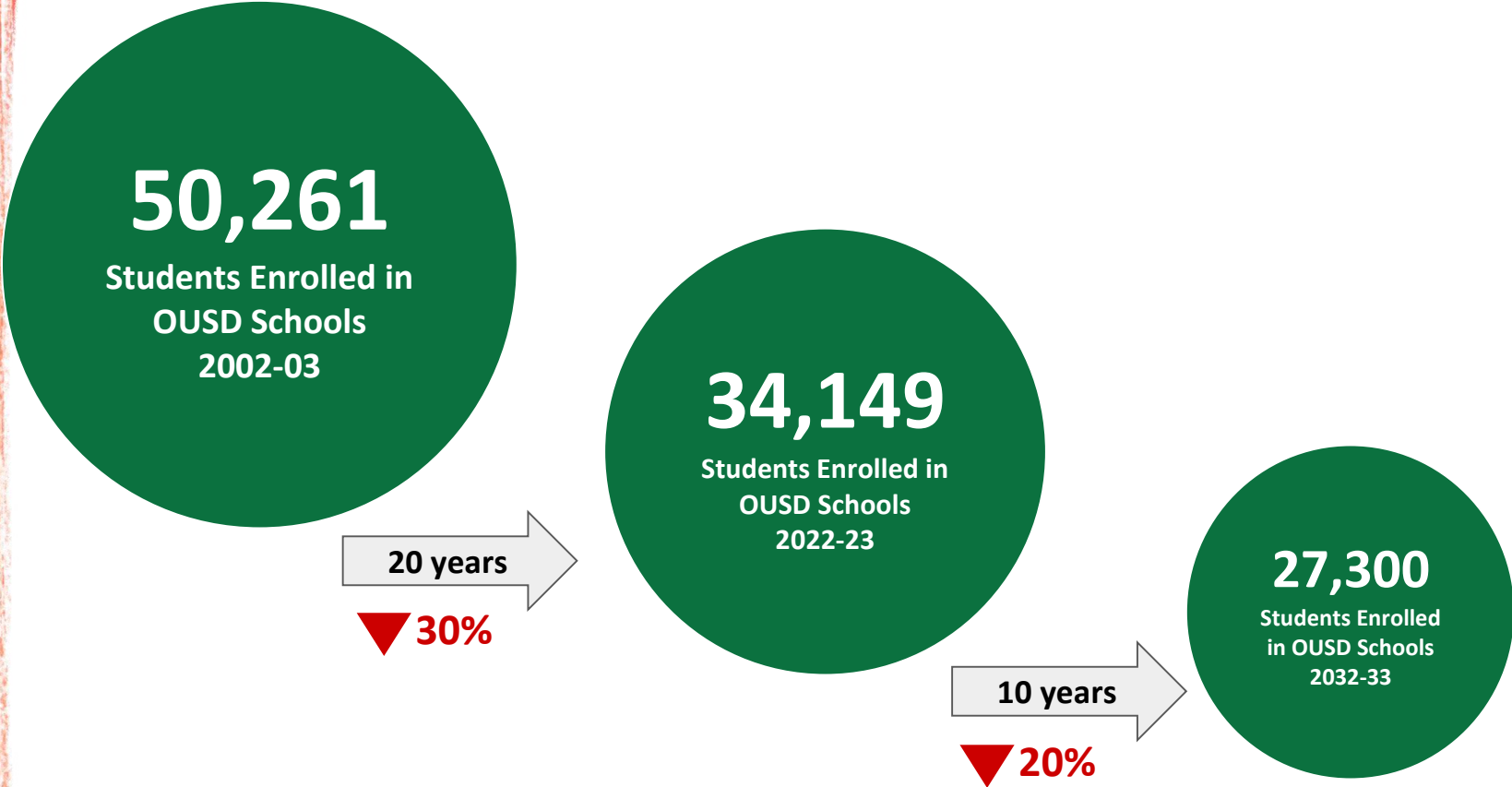
- Enrollment decline **predates the pandemic**.
- Nationally and locally there are **reduced birth rates** that continue to pressure on enrollment
  - Births are projected to continue to decline through 2025-2026 based available birth data from the Alameda County
- Rates of **homelessness** have significantly increased from 2017-2022 (83%).
- Lack of affordable housing in Oakland presents significant **housing cost burdens** to our community members.

Sources:

1. State of California, Department of Finance, California Public K-12 Graded Enrollment and High School Graduate Projections by County, 2023 Series. Sacramento, California, October 2023.
2. City of Oakland 2023-31 Housing Element, November 2022.

Note: Percentages have been rounding to the closest whole percent.

# Fast Facts: OUSD Historical & Current Enrollment



Source: State of California, Department of Finance, California Public K-12 Graded Enrollment and High School Graduate Projections by County, 2023 Series. Sacramento, California, October 2023.

## Board Discussion:

Given Oakland's constantly shifting needs in facilities, how do you foresee it impacting the Board's long-term asset planning?

What guiding principles or factors should steer Board discussions to ensure alignment with the mission, vision and strategic plan?

# Part 3: Alternative Approaches to Asset Management Observed in Other School Districts



# Space Needs for Educational Purposes

Space Needs for Educational Purposes	Space for Housing and Community Needs
<p>OUSD has needs for space for the following educational purposes:</p> <ul style="list-style-type: none"><li>● <b>Early Childhood Education:</b><ul style="list-style-type: none"><li>○ Early Childhood Hub</li><li>○ TK Hub for schools without space</li></ul></li><li>● <b>Central Offices with Direct Service to Students &amp; Families:</b><ul style="list-style-type: none"><li>○ Enrollment Offices for PK-12 in High Student Density Areas</li><li>○ Family Resources Hub, DHP, Family Resources</li></ul></li><li>● <b>Special Education Programs</b> supporting students that historically attend Non-Public Schools</li><li>● <b>Legally Mandated Charter Schools Housing</b></li></ul>	<p>OUSD may opt to repurpose certain facilities to meet community needs and generate additional revenue for educational programs. Some potential uses for community space include:</p> <ul style="list-style-type: none"><li>● Workforce Housing</li><li>● Accommodation for Unhoused Families and Students</li><li>● Affordable Housing</li></ul> <p><b>Non-Profit Organizations supporting OUSD students and families.</b></p> <ul style="list-style-type: none"><li>● Infant-Toddler Programming</li><li>● Childcare and Parenting Services</li><li>● Community-Based Organization (CBO) Programs to Support Special Populations</li></ul>



# Case Study: Oakland Unified School District (OUSD)

01

## Santa Fe

- Leased to Emeryville Unified as swing space during a facilities project
- Temporary location of Glenview Elementary School during construction of the Glenview Campus.
- Became the home of the Special Education Department, programming and Young Adult Program as Cole project launched

02

## Parker Community Resource Center

- Adult Education Program moved into facility and began providing adult education programming for neighborhood in January of 2022
- District created a Joint Use Agreement with Roots Community Health Clinic from July 2023 to June 2028.
- District receives annual payment of \$69,380 for 2024-25 with a 5% annual increase.

03

## Kaiser Early Childhood Center

- The site then received approval from the Board to become an Oakland's 2nd Early Learning Hub that opened in July of 2022
- Braiding funding with Early Childhood Funds allowed for campus improvement projects and building enhancements.



# Workforce Housing

## Growing a Diverse and Stable Staff

Attracting and Retaining Staff Reflective of Oakland's Rich Diversity

# OUSD Staff Survey

### Staff Housing Demographics:

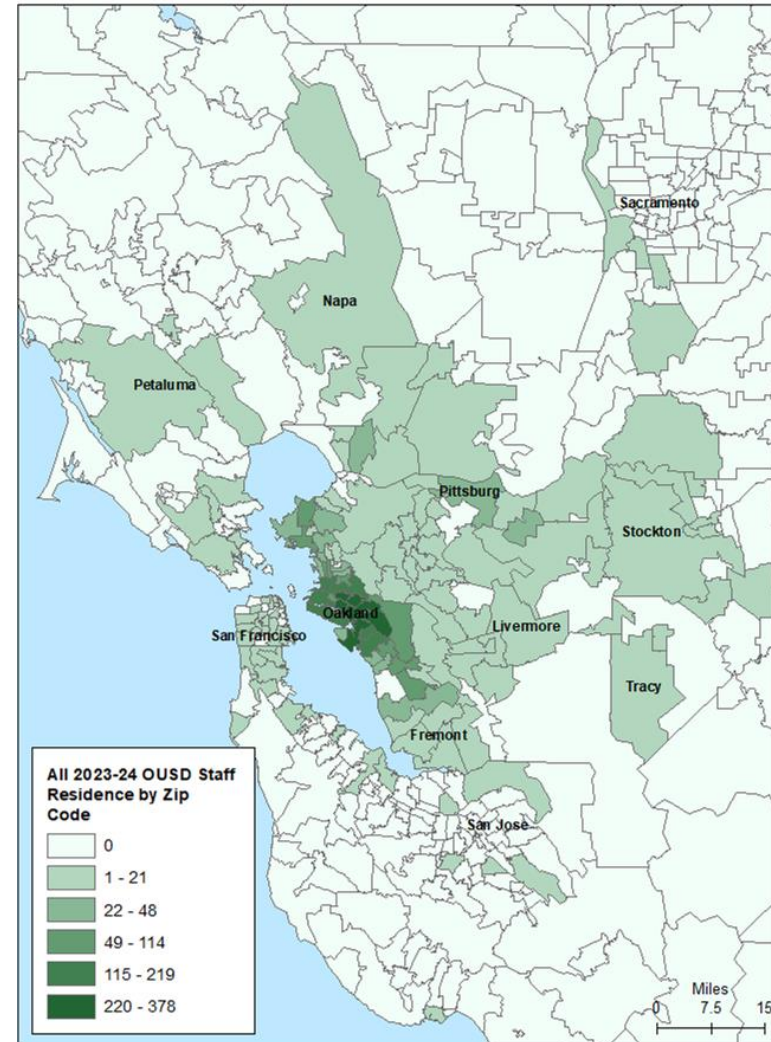
- 51% of OUSD staff currently rent
- 13% of OUSD staff have subsidized rent (by family, friends, government, other programs)
- OUSD staff members characterize themselves as homeless.
- **Over 61% of OUSD staff pay over 30% of the monthly household income for housing.**

### Staff Commute Profile:

- 15% of OUSD staff commute over 40 minutes in each direction daily.

#### Sources:

1. Hanover Research, OUSD Longitudinal Staff Retention Survey, February 2024.
2. Map is created by OUSD Research, Assessment & Data, April 2024.



# Overview of Teacher-Staff Housing Elections in California

2017-2018	2020	2022	2024
<p>LAUSD Jefferson Union</p>	<p>Chula Vista ESD East Side Union HSD Mtn View-Whisman ESD Pasadena USD Salinas HSD Soledad USD</p>	<p>Alum Rock Union ESD Jefferson ESD Santa Cruz City Schools South San Fran USD</p>	<p>March 2024 Mammoth USD San Leandro USD</p> <p>November 2024</p> <ul style="list-style-type: none"> <li>• 10+ Districts</li> </ul>



Sources: Los Angeles USD, Educational Workforce Housing, 45th Annual CASH Conference, February 2024.

# Case Study: San Leandro Unified School District (SLUSD)

## Frequently Asked Questions (FAQ)

### WHAT IS MEASURE J?

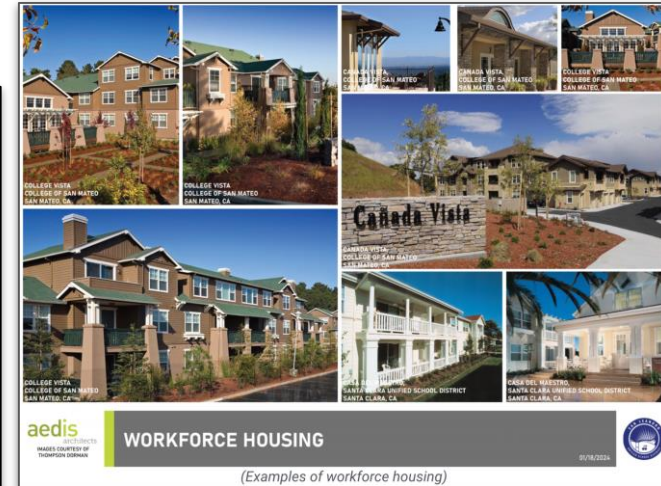
Measure J is a general obligation (GO) bond measure on the March 5, 2024, Presidential Primary Election ballot. If approved by 55% of district votes cast, it will result in an extension of the current tax rate to authorize \$174 million to make critical renovations and improve schools and classrooms throughout the San Leandro Unified School District. In addition, Measure J will allow the district to qualify for state matching funds. Measure J enables the district to attract, hire, and retain highly qualified teachers and staff. It will help address the housing shortage by building rental housing for teachers and staff so they can live in and be part of the community where they work.

### WHAT IS A GO BOND?

California school districts commonly use GO bonds to fund improvement projects, such as constructing and renovating classrooms. Similar to a home loan, GO bonds are repaid over time. Funds to repay the bonds come from taxing all taxable property—residential, commercial, and industrial—located within the district.

### WHY IS TEACHER-STAFF HOUSING NEEDED?

The Bay Area housing crisis has become a barrier to our teachers and school staff living and working in San Leandro and nearby communities. Each year our students lose high quality teachers who move away from San Leandro to find positions in other school districts where housing is less expensive. The shortage of affordable housing in the East Bay also makes it difficult for the district to attract and hire new outstanding teachers and staff. Measure J addresses these problems by constructing affordable rental housing for teachers and staff.



March 2024 - San Leandro residents approved Measure J, a \$174 million bond measure to enhance SLUSD schools with essential facility upgrades. Proposed initiatives include building rental housing units for teachers and staff, fostering community integration.

Source: San Leandro Unified School District, Measure J Facts for Leandro Families,

# San Francisco Unified School District (SFUSD)

- **Enrollment, SY 2022-2023:** 55,537
- **Location:** 1360 43rd Ave, San Francisco
- **Example:** District Developed
- **Owner:** SFUSD
- **Funding:** \$105M
- **Development:** Public Private Partnership
- **Description:** 138 units. Affordable housing requiring maximum income of \$160,000/year
- The housing lottery for this complex has just begun. Two more developments planned: 63 units in Mission and 75 units on Golden Gate Ave.



Francis Scott Key Annex, 2022



Shirley Chisholm Village, Rendering, 2024

#### Sources:

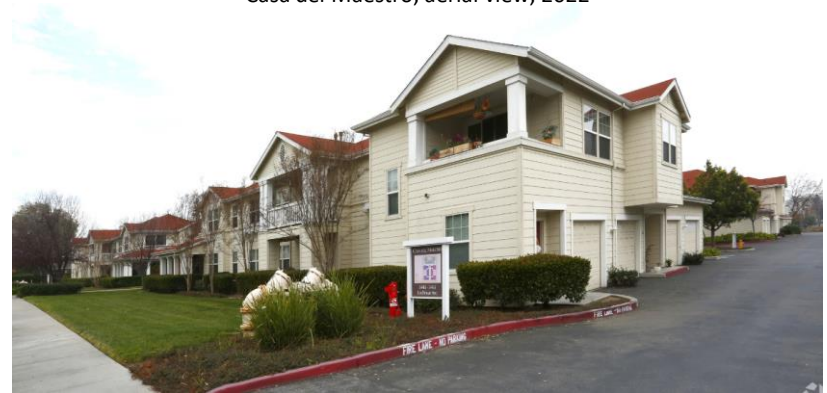
1. MidPen Housing, Shirley Chisholm Village Website
2. California Department of Education, California School Directory, San Francisco Unified School District
3. MidPen Housing, Francis Scott Key Annex Educator Housing Update for SFUSD B&G Committee, February 2019

# Santa Clara Unified School District (SCUSD)

- **Enrollment, SY 2022-2023:** 13,919
- **Location:** 3445 Lochinvar Ave, Santa Clara
- **Example:** District Developed
- **Owner:** SCUSD
- **Development:** District developed
- **Cost:** \$13 million; 2 phases
- **Description:** 140 units; 80% of market rate; teachers within their first decade of service can reside for 7 years. Located on a K-12 complex.



Casa del Maestro, aerial view, 2022



Casa del Maestro, 2023

#### Sources:

1. Student Housing, Casa Del Maestro, KTG Architects, 2024.
2. Urban Residential Development, Thompson Dorfman, 2022.

# Jefferson Union High School District (JUHSD)

- **Enrollment, SY 2022-2023:** 4,326
- **Location:** 705 Serramonte, Daly City
- **Example:** District developed
- **Owner:** JUHSD
- **Funding:** Voter approved bond. \$75.5 M (\$33M Bond and \$45.5M certificate of participation)
- **Development:** District developed
- **Description:** Housing was built on a former parking lot within the same parcel as the district office. Move in began on April 30, 2022.
  - 122 units;
    - 60% dedicated to certificated staff
    - 40% to classified staff.



JUHSD Parking lot, 2019



705 Serramonte, JUHSD Staff Housing, 2022

#### Sources:

1. JUHSD, Educational Staff Housing, Help for Other Districts, 2024
2. San Mateo County, Assessor maps, 2024





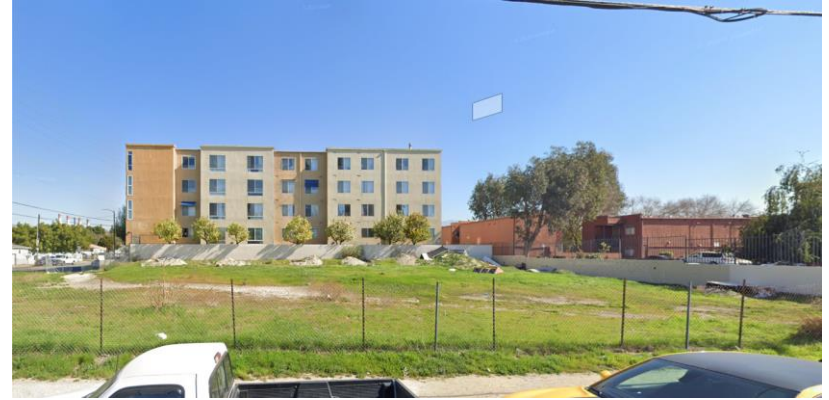
# Affordable Housing/Unhoused Housing

# Los Angeles Unified School District (LAUSD)

- **Enrollment, SY 2022-2023:** 538,295
- **Location:** 9190 N Telfair Ave, Sun Valley
- **Example:** District developed
- **Owner:** LAUSD
- **Funding:** Prop. HHH., California Department of Housing and Community Development (HCD) Multifamily Housing Program and Supportive Housing Multifamily Housing Program, Section 8 Vouchers, 4% tax credits + tax exempt bond
- **Development:** District partnership
- **Description:** 26 units with preference for homeless families with children attending LAUSD schools.  
Property is managed by an affordable housing non-profit organization.

Sources:

1. ManyMansions, Sun King
2. Edsource, M.Seshadri. "LAUSD Partners Provide 25 Affordable Housing Units for District Families", March 25, 2024



Feb 2021



Sun King Apartments, 2024



# Land Swap

# County of Santa Clara and Apple

- **Location:** 10333 N. Wolfe Road, Cupertino
- **Owner:** County of Santa Clara
- **Partners:** Eden Housing
- **Funding:** Unknown until 2025-26
- **Development:** Public-Private Partnership
- **Description:** Apple swapped approx 5 acres of land at this location for approx 1.5 acres of county owned land at 10591 N. De Anza Blvd. in 2023. The project is currently in the planning phase and has potential for 257 to 336 residential units throughout the property. The project is mixed income housing with both affordable housing and teacher housing.



Sources:

1. Wolfe Road Housing, Development Information
2. San Jose Spotlight, A. Freimarck. "Santa Clara County deal brings teacher housing to Cupertino", February 23, 2024



# Land Sale

# Twin Rivers Unified School District Sale of Land

Property Name	Former Purpose	Size	Appraised Value in 2017	Final Sale Price
Selma Clark	Vacant parcel	9.07 acres	\$220,000	\$291,000
Del Paso Shop	Former warehouse and maintenance shed, storage	0.28 acres	\$150,000	\$75,000
Dorcus Ryan	Vacant parcel	10 acres	\$300,000	\$416,111

Source: Twin Rivers USD Board Resolutions No. 873,874, 875.  
 TRUSD Surplus Property Appraisal Report, BBG, September 2017.

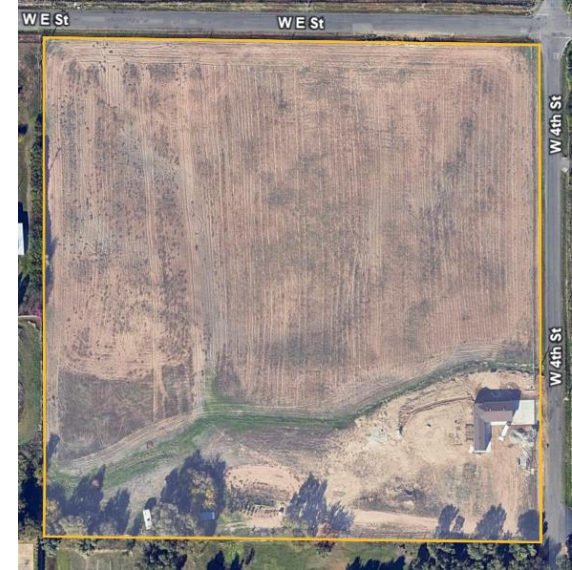
# Twin Rivers Unified School District Sale of Land



Selma Clark



Del Paso Shop



Dorcus Ryan



# High Revenue Lease



# San Francisco Unified and San Francisco Centre

- **Location:** 865 Market St. San Francisco, CA
- **Area:** 75,625 SF (1.73 acres)
- **Owner:** San Francisco Unified School District
- **Lease Terms:** 1983 to June 2043. Annual rent of \$1M with additional increases accounting for inflation + .1% of mall's gross revenue.
  - 2023 payment: \$3.26M.
- **Development:** Private
- **Description:** Webster Primary School (1860) and Lincoln Grammar School (1865) were destroyed in the aftermath of the 1906 earthquake. The district negotiated a long term ground-lease for retail use from 1983 to 2043.



Lincoln Grammar School, 1906



Westfield Mall, 2018

Source: San Francisco Chronicle, R. Li. "Westfield's mall exit has a surprising financial stakeholder: S.F.'s school district". Sep 12, 2023.

## Board Discussion:

When you review different strategies that other district's have used, what are the strengths and weaknesses of each?

Are there ideas or concepts that OUSD staff should explore based on this information?

# Part 4: Focus on OUSD's Vacant Properties





# OUSD Policies & Procedures as it Relates to Asset Management

# OUSD Facilities Asset Summary

**Facility Site/Campus Definition:** A physical location of an OUSD campus, which may have more than one school and more than one building or set of buildings on the site.

## BP 7350 Physical Assets Management:

*“The physical assets of the Oakland Unified School District shall be managed and maintained as a system **to provide safe, secure, healthy, and technologically ready learning environments for students** in Oakland’s publicly funded schools in alignment with the District’s Strategic Plan. To support the District’s educational and operational functions, the District shall also use its properties to realize unrestricted revenue to support programs and services for District students.”*

# Current Language in 7350 Around Prioritization

## Priority Order for Use of Properties

1. Provide technologically advanced learning and recreation space for general education and special education students and families enrolled in schools operated by the District.
2. Provide for temporary relocation of schools for major construction and modernization projects.
3. As acknowledged by Proposition 39 (2000), provide learning and recreation space for students enrolled in charter schools operating in the District, including the consideration of leases terms for charter schools that align with the term of charters and, at equitable rates, for those charters providing high quality options for Oakland children.
4. Provide quality operations and administration facilities to enable high performance by District staff.
5. To the extent that the District has excess capacity, the District shall make this space available at fair market value or otherwise reasonably negotiated rates in order to generate unrestricted general fund revenues to support programs and services for District programs, and cash reserves for long-term maintenance, equipment and capital facilities needs.

# Procedural Summary (with Ed. Code waiver) for Vacant Properties

<b>SURPLUS PROPERTY PLANNING WORKSHEET</b>	
(Bd mtg date)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Determine whether 7-11 committee will be required to declare the property "exempt surplus" (not required for non-instructional facilities, workforce housing, lease to private entity for summer school). (EC 17391).</li> <li><input type="checkbox"/> (Optional) Adopt resolution directing staff to recruit 7-11 committee and begin the surplus process.</li> </ul>
Recruitment work 30-60 days	<ul style="list-style-type: none"> <li><input type="checkbox"/> Recruit 7-11 committee members.</li> <li><input type="checkbox"/> (Optional, but recommended) obtain appraisal <i>through counsel</i> to determine market value.</li> <li><input type="checkbox"/> (Optional) Obtain real estate agent.</li> <li><input type="checkbox"/> (Optional, but recommended) Obtain condition of title report.</li> </ul>
(Bd mtg date)	<ul style="list-style-type: none"> <li><input type="checkbox"/> School Board takes action to <b>appoint</b> 7-11 committee members. (EC 17388).</li> </ul>
711 mtgs (timing dependant on complexity)	<ul style="list-style-type: none"> <li><input type="checkbox"/> 7-11 committee must post notice prior to hearing &amp; circulate priority list of surplus space.</li> <li><input type="checkbox"/> 7-11 committee must hold a hearing. (EC 17389).</li> <li><input type="checkbox"/> 7-11 committee adopts report and makes findings. (EC 17389).</li> <li><input type="checkbox"/> If waiver is sought, solicit input 7-11 Committee and bargaining groups on the waiver. (EC 33050(b)(1)).</li> </ul>
(Bd mtg date)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Board receives 7-11 report, declares property "exempt surplus." (GC 54221(b)(1)).</li> <li><input type="checkbox"/> Submit resolution to HCD for 30-day review period. (GC 54221(b)(1)).</li> <li><input type="checkbox"/> If waiver is sought, Board holds hearing, passes resolution authorizing staff to file a waiver. (EC 33050(a)).</li> </ul>
<b>Statutory Surplus Property Steps</b>	
Offer Period ~60-90 Days	<p><b>For Leases Only</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 60 day offer to lease vacant classrooms for to SELPA/COE for SPED programs (EC 17465)</li> </ul> <p><b>Additional Steps For Both Sales &amp; Leases</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> (Optional) Offer for child care development services. (EC 17458.)</li> <li><input type="checkbox"/> <i>Naylor Act</i> - 60 day offer of land used, or particularly suited for recreational purposes for prior 8 years to (1) City, (2) Park/rec District (3) Regional park authority, (4) County. (EC 17485, 17489).</li> </ul> <p><b>Additional Steps Only For Sales &amp; Leases With Purchase Options</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Notice former property owner 60 days prior to bid date (EC 17470).</li> <li><input type="checkbox"/> 60 day offer to DGS/UC/CSU/County/City, housing authority, and publication of intent to sell 1x week for 3 weeks. (EC 17464).</li> </ul>
<b>SBE Waiver of Surplus Steps</b>	
	<p><b>File SBE Waiver</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> In unlikely event property is not "exempt surplus," make offers required under GC 54220 <i>et seq.</i> (EC 17459 not waivable).</li> <li><input type="checkbox"/> Gather approvals needed for waiver application, consult with unions</li> <li><input type="checkbox"/> Submit online waiver application. SBE meets every other month, and has a two-month lead time (approximately) on agenda items.</li> </ul>
(Bd mtg date)	<p>If waiver is granted:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Authorize staff to file CEQA exemption.</li> <li><input type="checkbox"/> Issue RFP seeking potential buyers.</li> <li><input type="checkbox"/> Negotiate agreement</li> <li><input type="checkbox"/> Publicly announce proposals and approve agreement within 30-60 days</li> </ul>
(Bd mtg date)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Board adopts "Resolution of Intent" by 2/3 vote specifying minimum price, terms, broker fee, and setting date to open proposals at least 3 weeks later. Publish notice in a newspaper once per week for 3 weeks. (EC 17466, 17472).</li> <li><input type="checkbox"/> Provide bid documents to interested parties.</li> <li><input type="checkbox"/> Authorize staff to file CEQA exemption.</li> <li><input type="checkbox"/> At Board meeting, open and declare bids, call for oral bids.</li> <li><input type="checkbox"/> Accept bids or adjourn and accept bids within 10 days.</li> </ul>
(Bd mtg date)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Buyer due diligence, title report, closing.</li> <li><input type="checkbox"/> Request planning commission report re: general plan (40 day response window). (GC 65402).</li> </ul>
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Buyer due diligence, title report, closing.</li> <li><input type="checkbox"/> Request planning commission report re: general plan (40 day response window). (GC 65402).</li> </ul>

1. Board passes a resolution determining the property is ("exempt surplus"), which will be sent to the State Department of Housing and Community Development for a 30-day review.
2. Board recruits and appoints 7-11 members, may order appraisals and title reports.
3. 7-11 Committee analyzes properties, holds hearings, adopts a report, and may consult on a waiver as needed.
4. Board may authorize filing a waiver application to the State Board of Education, allowing the District to issue a competitive RFP and market properties in a more traditional manner.
5. Unless waived, Board offers the property to certain other public entities for a period of sixty days.
6. District issues an RFP, negotiates and approves an agreement.
7. District requests planning commission determine whether the sale is consistent with the General Plan. Planning commission has 40 days to respond.
8. Buyer completes due diligence on the property to ensure it meets Buyer's needs.
9. The transaction closes, a deed is recorded and funds are sent to District.

# Opportunities to Use Vacant Properties?

Requirements	Sale	Lease <sup>1</sup> (>30 days)	Workforce Housing <sup>1</sup>	Joint Occupancy	Exchange
<b>Surplus Land Act Guidelines (“SLA”), California Department of Housing and Community Development (Gov Code Section 54220, et seq.)</b>	Exempt so long as property is “subject to” 7-11 Committee	Exempt so long as property is “subject to” 7-11 Committee	Yes	Not Applicable	Exempt so long as property is “subject to” 7-11 Committee
<b>7-11 Committee (Education Code Section 17390)</b>	Required, unless exempt per Education Code Section 17391	Required, unless exempt per Education Code Section 17391	Exempt per Education Code Section 17391	N/A	Not required but desirable to be exempted from SLA
<b>Offer to certain public/ gov’t agencies 1st?</b>	Yes, unless waived	Yes (shorter list), unless waived	No	No	No
<b>Highest Bidder</b>	Yes, unless waived	Yes, unless waived	No	No	No
<b>Proceed Use</b>	Capital Outlay	Capital Outlay for lease with Purchase Option. Lease with no purchase option creates general fund revenue.	Depends on structure	Depends on structure	Depends on structure

<sup>1</sup> As of January 1, 2020, the District must declare the property as “surplus land” or “exempt surplus land” pursuant to Government Code Section 54221(b)(1). Declaring the property as exempt surplus land will mean that most of the requirements in Government Code sections 54220, et seq., will not apply, except for the requirement to make written solicitations to agencies to purchase or lease the property for park and recreational purposes.

<sup>2</sup> If lease, proceeds are general fund monies.



## Current Properties with Ground Lease

We will be doing a review of these three sites in a future facilities committee meeting to more deeply understand the obstacles or challenges on implementation.

- Piedmont CDC
- Edward Shands Adult Education Center
- Tilden CDC

# Piedmont CDC: 86 Echo Ave, Oakland, CA 94611

- **Facility age:** 58 years
- **Area:** 29,831 SF (.68 Acres)
- **General Plan:** Mixed Housing Type Residential
- **Estimated cost to address facilities needs**
  - 2020: \$794,006
  - 2024: \$1,016,327
- **Year closed:** 2010
- **Context:** Piedmont Ave CDC was a part of the CDC closures in 2010.

**December 2017:** Board approved Joint-Use Lease Agreement between OUSD and City of Oakland for 3 years. District leased modular buildings to City for library use at \$2,500/month.

**December 2022:** Board approved Joint Occupancy and Lease Agreement between OUSD and City of Oakland for 50 years. Existing modular building to be leased until new library construction completion. Rent of \$4,000 commences upon receipt of Occupancy Certificate or March 4, 2026, whichever is earlier.

Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.



# Piedmont CDC: Additional Context

## Background

- **May 2021:** District issued an RFP for a Public Library Joint Occupancy Development; subject to securing the necessary funding by November 30, 2024.
- **August 2021:** Board selected the City's proposal for joint occupancy development.
- **December 2022:** City Council authorized the Agreement, and the Board approved the Joint Occupancy and Lease Agreement between OUSD and the City for a public library at Piedmont Elementary School.

## Current Progress

- The Piedmont Ave Library Feasibility Study is nearing completion of the Conceptual Design and Community Outreach Phase.
- The City project team has completed a draft Facility Condition Assessment Report and conducted programming meetings with key stakeholders.
- The team hosted two community outreach meetings to gather input and present design options.
- The feasibility study, design options, and funding strategies are set to be submitted to OUSD by November 2024.

# Piedmont CDC: Current Conditions



# Former Edward Shands Adult Education Center: 2455 Church St, Oakland, CA 94605

- **Facility Age:** 3 two-story buildings built in 1968, and 1 portable building added in 1990
- **Area:** 49276 SF (1.13 acres)
- **General Plan:** Community Commercial
- **Estimated Cost to Address Facilities Needs:**
  - 2020: \$2,249,271
  - 2024: \$2,879,066
- **Year Closed:** 2010
- **Context:** The former use was Adult Education but the program closed in 2010 due to lack of funding. There was a short secondary use by Police Services.
- **Monthly Rental Rate:** \$4,000/month. The monthly rental rate shall be subject to three percent (3%) annual increases. Rent will increase by 10% for each one-to four-unit increase above 68 in the number of residential units approved for the project.



Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.
3. Board Enactment # 21-1198

# Former Tilden Child Development Center: 4551 Steele St.

- **Facility age:** 57 years
- **Area:** 19166 SF (.44 acres)
- **General plan:** Detached Unit Residential
- **Estimated cost to address facilities needs:**
  - 2020: \$3,176,026
  - 2024: \$4,065,313
- **Year closed:** 2010
- **Context:** The former use was a Childhood Development Center. The program closed in 2010 due to low enrollment of K-3 students and poor facility conditions. The entire pre-school and general education programming offered at the site was moved to the Burbank campus.
- **Monthly Rental Rate:** \$3,000/month. The monthly rental rate shall be subject to three percent (3%) annual increases. Rent will increase by 10% for each one-to four-unit increase above 20 in the number of residential units approved for the project.

Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.
3. Board Enactment # 21-1197



# Edward Shands & Tilden: Additional Context

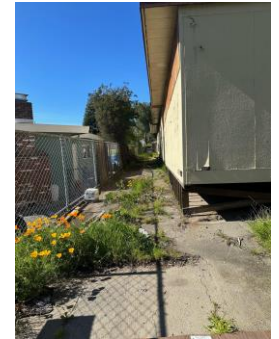
## Background:

- **January 2020:** 7-11 Committee recommended surplus of 2 properties and pursuing a long-term lease for the former Tilden CDC, with priority uses identified based on public hearings.
- **February 2020:** Board passed resolutions to surplus Shands and Tilden for long-term lease, aligning with community priority uses.
- **October 2020:** RFP posted for long-term lease proposals.
- **November 2020:** Board announced acceptance of timely proposals.
- **December 2020:** Board reviewed and selected Eagle Environmental Construction & Development (EECD) for a Long-Term Ground Lease.
- **January 2021:** Public hearing held before entering negotiations.
- **June 2021:** Board approved Long-Term Ground Lease with EECD for Affordable and Workforce Housing, Workforce Development Training Opportunities, and Black Cultural Zone Programming at Shands & Tilden.

## Current:

- Completed recycling of metals and materials and soft demolition of interior buildings.

# Shands (2455 Church St) & Tilden (4551 Steele St)



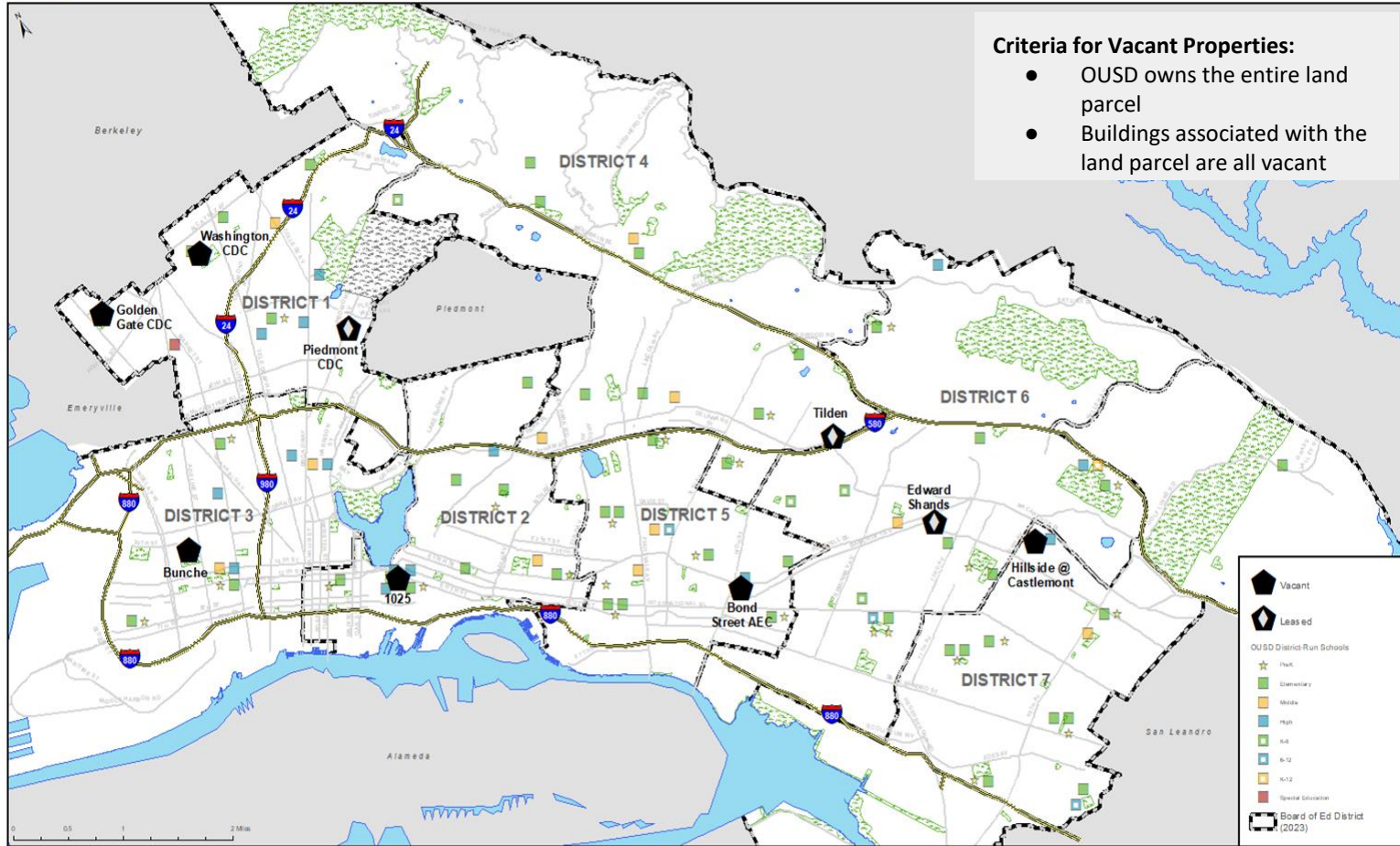




# Vacant Properties



## 2023-24 OUSD Facilities: Vacant & Leased Properties\*



Source: Map is created by OUSD Research, Assessment & Data, April 2024.

Note: Excludes OUSD properties leased to Charter Schools.

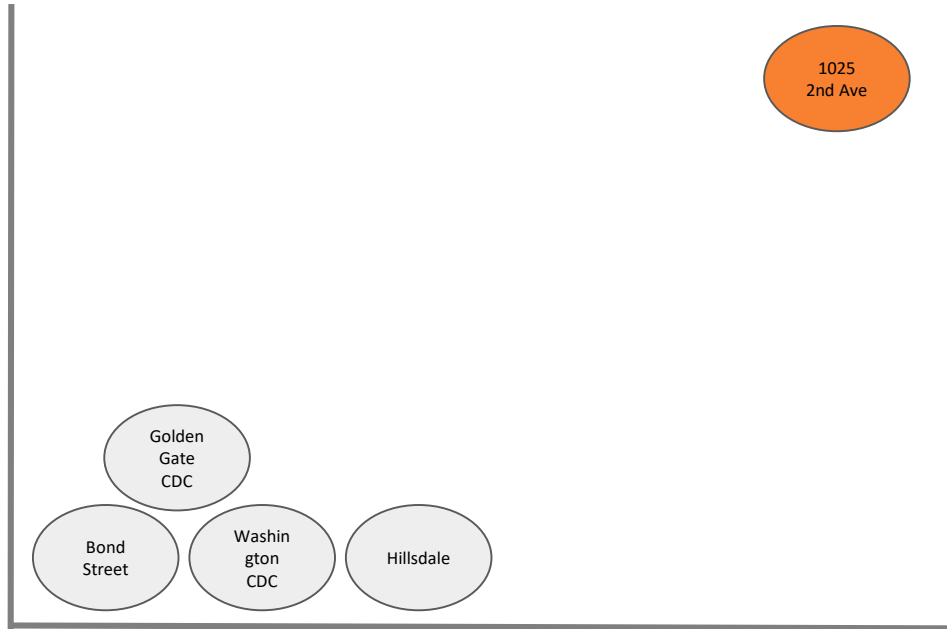
# Vacant Property Overview (In Development)





The properties, owned by the District, were analyzed by DCG Strategies to review real estate assets. DCG evaluated each site's real estate and zoning aspects for underutilized properties in 2021. Their review included on-site visits, zoning research, and analysis of local real estate trends and neighborhood contexts. District staff then refined these recommendations by considering board feedback and identified district needs in the chart below.

	Community Impact	Early Childhood	Residential Development	As Is	Commercial Development	Tier
1025 2nd Ave	x		x		x	1
Washington CDC		x	x			4
Golden Gate CDC		x	x			4
Bond Street				x		4
Vacant Lot				x		4
Hillside		x		x		4
Ralph Bunche	<i>Need to complete assessment of property</i>					

# Assessment of Vacant Properties

Revenue



-  Tier 1: High Community Impact  
High Revenue
-  Tier 2: High Community Impact  
Low Revenue
-  Tier 3: Low Community Impact  
High Revenue
-  Tier 4: Low Community Impact  
Low Revenue

Community Impacts

# Former Administrative Building: 1025 2nd Ave, Oakland, CA 94606

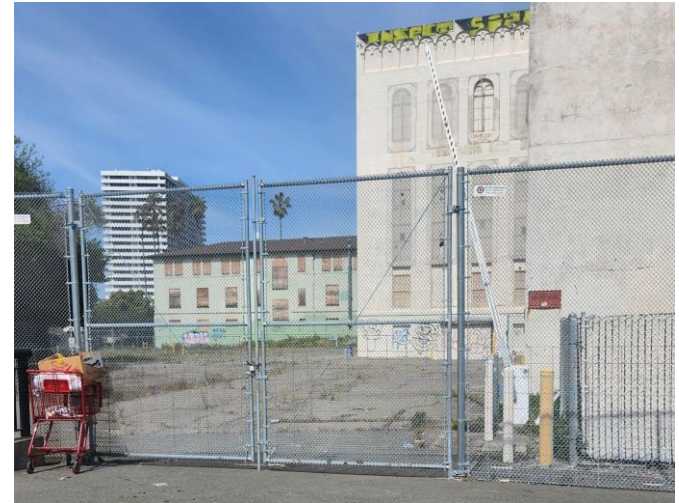
- **Alternate Name(s):** Paul Robeson Building and Ethel Moore Annex
- **Age:** 100+ years
- **Area:** 65,484 SF (1.5 acres)
- **General Plan (Zoning):** Urban Residential
- **Estimated Cost to Address Facilities Needs:**
  - 2020: \$85,000,000
  - 2024: \$108,800,000
- **Year Closed:** 2013
- **Context:** The property had been used, in whole or in part, for the main office of the District prior to the flood in January 2013, at which point the buildings stopped being used for District purposes.



Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.

# Former Administrative Building: Current Conditions



Graffiti now covers all sides of the buildings facing our schools. Trash lines the E 10th side of the property. Overall the site has become a blight on the neighborhood.

# Bond Street Annex School: 1710 45th Ave, Oakland, CA 94601

- **Area:** 6,028 SF (0.14 acres)
- **General Plan (Zoning):** Urban Residential
- **Estimated Cost to Address Facilities Needs:**
  - 2020: \$ 1,985,016
  - 2024: \$2,540,820
  - Recommended Demo Portables
- **Year Closed:** 2011
- **Context:** The property was closed due to the reduction of state funding for adult education. The site was then used as a storage facility until 2021.



Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.

# Bond Street Annex School: Current Conditions



Graffiti now covers the buildings. Overall the site has become a blight on the neighborhood.



# Ralph J. Bunche Academy: 1240 18th St, Oakland, CA 94607

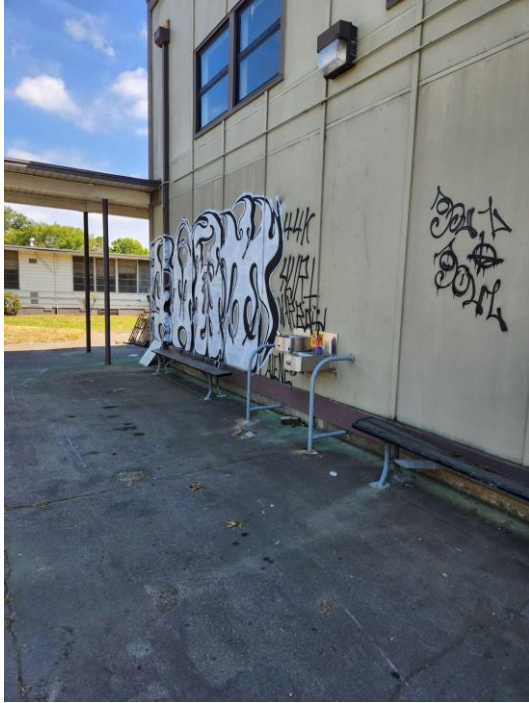
- **Facility age:** 46 years
- **Area:** 135,424 SF (3.11 acres)
- **General Plan (Zoning):** Institutional
- **Estimated cost to address facilities needs:**
  - 2020: \$7,963,231
  - 2024: \$10,192,935
  - Recommended Demo Portables
- **Year closed:** 2020
- **Reason:** In April 2021, The Board of Education passed Resolution Number [2021-0045](#), which ratified the decision to temporarily locate Bunche Academy at the West Oakland Middle school (WOMS) campus, located at 991 14th Street, and authorized keeping Bunche Academy at the WOMS campus through the end of the SY 2023-24. Board is yet to make a determination on the space use at this property.



Sources:

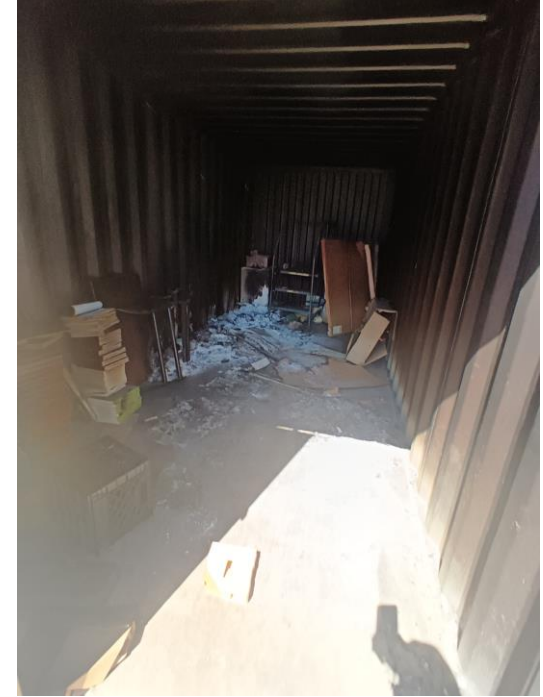
1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.

# Ralph J. Bunche Academy: Current Conditions



Graffiti now covers the buildings. The site is partly being used as storage.

# Ralph J. Bunche Academy: Current Conditions



Fire was reported at Ralph J. Bunche Academy in April 2024.

# Washington Childhood Development Center (Partial): 581 61st St, Oakland, CA 94609

- **Facility age:** 51 years
- **Area:** 15,800 SF (0.36 acres)
- **General Plan (Zoning):** Mixed Housing Type Residential
- **Estimated cost to address facilities needs:**
  - 2019: \$1,827,000
  - 2024: \$2,338,560
  - Recommended Demo Portables
- **Year closed:** 2010
- **Context:** The program closed due to reductions in state funding. At that time, the pre-school moved into the Sankofa School building. There was a short temporary use of the former CDC by the Temporary Alternative Placement (TAP) Center.



Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.

# Washington CDC: Current Conditions



The mural has been graffitied over. The siding on the portable is deteriorating. Grass and weeds are breaking through the asphalt throughout the schoolyard.

# Golden Gate CDC: 6232 Herzog St, Oakland, CA 94608

- **Facility age:** 98 years
- **Area:** 25,531 SF (0.59 acres)
- **General Plan (Zoning):** Mixed Housing Type Residential
- **Estimated cost to address facilities needs:**
  - 2020: \$1,985,016
  - 2024: \$2,540,820
  - Recommended Demo Buildings
- **Year closed:** 2010
- **Context:** Golden Gate CDC was a part of the CDC closures in 2010. The site is located across the street, separate from Golden Gate Elementary which is currently leased by ASPIRE. The site was leased to Yu Ming Charter School from 2014 to 2018.



Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.

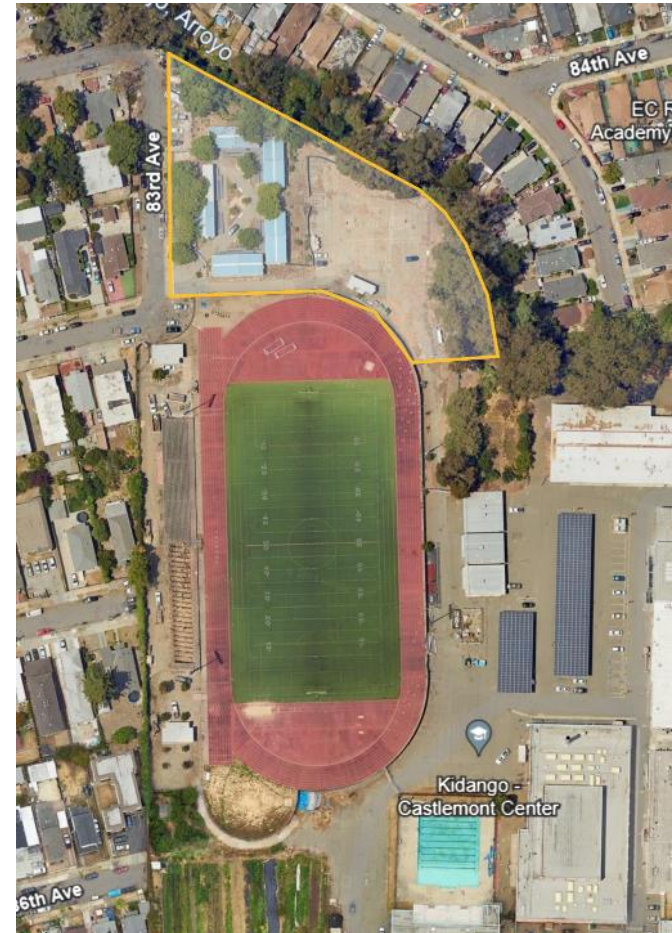
# Current Conditions at Golden Gate CDC



Grass and weeds have taken over the asphalt and play matting. The paint on buildings in terrible condition. Trash accumulates around the former school.

# Hillside at Castlemont (Partial): 2369 84th Ave

- **Facility age:** 23 years
- **Area:** 116,290 SF (1.9 acres)
- **General Plan:** Institutional
- **Estimated cost to address facilities needs:**
  - 2020: \$4,714,413
  - 2024: \$6,034,448
- **Year closed:** 2014
- **Context:** This portion of the Castlemont campus served as Hillside Academy until 2014 and shortly served as the Rudsdale Newcomer campus until the end of the SY 2020-21. This portion of the campus is made up of 6 portables.

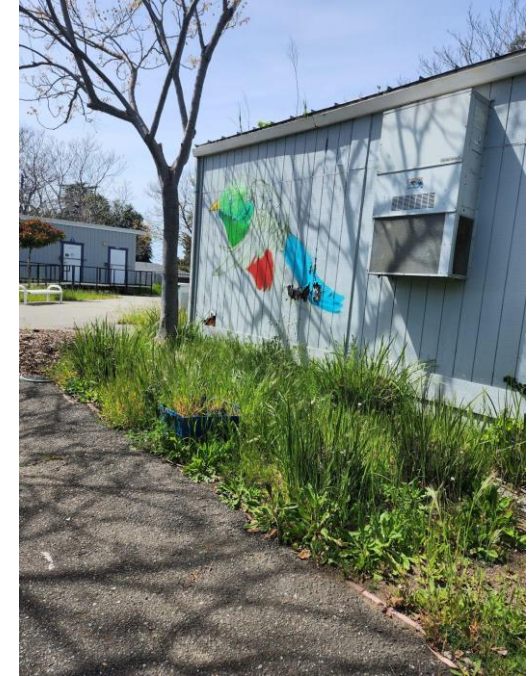


Sources:

1. OUSD Facilities Master Plan 2020, April 2020.
2. California Department of General Services, California Construction Cost Index.



# Hillside at Castlemont (Partial): Current Conditions



Trash and abandoned vehicles can be seen collecting along the street in front of the former Hillside Academy. Overgrown grass and weeds. Damage to the exterior portable walls.

## Board Discussion:

Based on the 5 current vacant sites, what thoughts do you have about future use of the properties?

Is there further analysis or additional data that staff can provide to offer deeper insights to the Board?

# THANK YOU

## Any Questions?

Additionally, for more information, please reach out:

# Resources



**OAKLAND UNIFIED  
SCHOOL DISTRICT**  
*Community Schools, Thriving Students*

1. OUSD BP 7350 Physical Assets Management:  
<https://ousd.legistar.com/LegislationDetail.aspx?ID=3927265&GUID=AE6B6819-88B0-41A4-A2AD-A5FD2BFAF63E&Options=ID|Text|&Search=assets+management>
1. OUSD Asset Management Report, 2021:  
<https://resources.finalsite.net/images/v1692100286/ousdorg/giki0zemkd9pen36mnh/2021AssetManagementReport.pdf>
1. OUSD Facilities Master Plan, 2020: <https://www.ousd.org/facilities-planning-management-department/about/about/facilities-master-plan>
1. OUSD Asset Map:  
<https://ousd.maps.arcgis.com/apps/View/index.html?appid=e2d956e81eaf4a45b24b705e76b7871e&extent=-122.4784,37.7048,-121.9901,37.8847>
1. OUSD Enrollment Dashboard:  
[https://dashboards.ousd.org/views/Enrollment/Snapshot?:embed=y&:showAppBanner=false&:display\\_count=n&:showVizHome=n&:origin=viz\\_share\\_link](https://dashboards.ousd.org/views/Enrollment/Snapshot?:embed=y&:showAppBanner=false&:display_count=n&:showVizHome=n&:origin=viz_share_link)
1. OUSD Leases Dashboard: [https://dashboards.ousd.org/views/OUSDLeases2021-22/Leases?:iid=1&:embed=y&:isGuestRedirectFromVizportal=y&:display\\_count=n&:origin=viz\\_share\\_link&:showVizHome=n#2](https://dashboards.ousd.org/views/OUSDLeases2021-22/Leases?:iid=1&:embed=y&:isGuestRedirectFromVizportal=y&:display_count=n&:origin=viz_share_link&:showVizHome=n#2)
1. OUSD Classroom Utilization Dashboard:  
[https://dashboards.ousd.org/views/UtilizationDashboard\\_17055329266870/UtilizationCalculations?:showAppBanner=false&:display\\_count=n&:showVizHome=n&:origin=viz\\_share\\_link&:embed=y#2](https://dashboards.ousd.org/views/UtilizationDashboard_17055329266870/UtilizationCalculations?:showAppBanner=false&:display_count=n&:showVizHome=n&:origin=viz_share_link&:embed=y#2)

# INDEX



**OAKLAND UNIFIED  
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[24-0191](#), January 2024: Presentation - Facilities Committee on the Policies and Decision-Making Process for Asset Management.

[23-2075](#), January 2024: Resolution - Prioritizing the Disposition and Use of Unutilized District Properties - Facilities Committee.

October 2023: Town hall - The Future of Affordable Housing at Unused OUSD Sites

[21-1686](#), June 2021: Report - Implementation of Resolution 2021-0128 - Advancing District's Citywide [Redesign of Quality Schools] Plan Work.

[21-0278](#), February 2021: Report - Key Facilities Policies and Reopening of Schools Plan.

[20-2146](#), December 2020: Resolution - Advancing District's Citywide Plan Work - Board of Education.

[18-2155](#), October 2018: Discussion - Board Policy 7350 - Physical Asset Management - Facilities Department.

# GLOSSARY



**OAKLAND UNIFIED  
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## **Asset Management**

The systematic process of planning, operating, maintaining, upgrading, and disposing of assets in a cost-effective manner to support the district's vision and mission. The process of evaluating the condition and needs of school facilities, determining future requirements, and developing plans for their effective use and maintenance.

## **Deferred Maintenance**

Maintenance activities that have been postponed or delayed, leading to deterioration of facilities and increased repair costs over time.

## **Disposition**

The process of transferring or disposing of surplus property, which may include sale, lease, exchange, or donation.

## **Facility Site/Campus Definition**

A physical location of an OUSD campus, which may have more than one school and more than one building or set of buildings on the site.

## **Lessee**

The party who leases or rents property from another party. The lessee is the tenant who pays rent to occupy and use the property for a specified period.

## **Lessor**

The party who owns the property and leases or rents it to another party. The lessor is the landlord who grants the right to use the property to the lessee in exchange for rent.

## **Physical Assets**

Any buildings, land, facilities, and infrastructure owned or leased by the district. These assets provide the physical space and resources necessary for delivering educational programs, supporting administrative functions, and maintaining the overall operation of the district.

## **Surplus Property**

Surplus is space that is not needed for classroom purposes after meeting District students needs and in-District charter student's needs. Identified as an option for addressing structural deficit and increasing resources to students.

## **Surplus Land Act (SLA)**

Legislation governing the disposal of surplus land by public agencies in California, aimed at ensuring that surplus public land is prioritized for affordable housing and other public benefits.

# OUSD Property Disposition Options & Considerations

## Lease Options - without Surplus Property designation

1. **Joint use:** short-term agreement permitting use of space for (up to five years, with renewals) to community-based organizations (CBOs) such as daycares, preschools, or community centers.
2. **Joint occupancy:** long-term leased space which may include property development, allowing for up to 99 years lease period. Initiates landlord tenant terms and conditions.
3. **Exchange of property:** Exchange surplus property for income-producing property.

## Lease Options with Surplus Property designation

1. **Ground Lease:** Ground lease is also occupancy initiating tenancy but excludes the Owner (tenant has exclusive occupancy rights during the term of the Ground Lease).
2. **Lease for long-term CBOs use or commercial development:** Lease surplus property for long-term community-based organization use or commercial development, consistent with generating revenue for the district.

# OUSD Property Disposition Options & Considerations

6. **Lease an entire campus:** Lease an entire campuses to schools, potentially generating premium income for the district
7. **Sale options:** CBOs: Sale of surplus property to community-based organizations for land + existing buildings or land only.
8. **Sale options:** Development for affordable housing: Sale of surplus property for affordable housing development, potentially resulting in lower returns but with potential political benefits.
9. **Sale options:** Development for market-rate housing: Sale of surplus property for market-rate housing development, involving extensive analysis and potentially lengthy approval processes.

# Surplus Land Disposition: Process and Code Requirements

## Definition:

- “Surplus” is space that is not needed for classroom purposes after meeting District students needs and in-District charter student’s needs.
- Identified as an option for addressing structural deficit and increasing resources to students.

## Process and Code Requirements by California Department of Housing & Community Development, 2021:

- The disposition (sale/lease) of property may be subject to the Surplus Land Act (SLA).
- Government Code section 54221(b)(1) mandates that a local agency declare land as either “surplus land” or “exempt surplus land” with written findings before any disposal action.
- Pursuant to Government Code 54222 (a)(1), any local agency disposing of surplus land must send a written notice of availability to certain local public entities, CalHFA certified housing sponsors, and other local agencies.
- Government Code 54230.5 (b)(1) requires a local agency to provide a description of notices sent and negotiations conducted with any responding entities to the Department of Housing and Community Development before agreeing to terms for surplus land disposition, along with any restrictions to be recorded against the property.

# APPENDIX



**OAKLAND UNIFIED  
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# District Facilities and Charters 101

**Key Concept:** The District's charter authorizing responsibilities are separate and different from the District's obligations around OUSD facilities and charter schools.

## → ***What do charter schools have to do with OUSD facilities?***

Prop 39 and its implementing regulations require school district facilities to be shared fairly among all public school students who reside in the district, including those in charter schools.

## → ***What is required of the District?***

School Districts must make facilities available to charter schools to serve their in-district students in conditions reasonably equivalent to those in which they would be served if they were attending other public schools in the District.

# Prop 39 - OUSD Obligations

OUSD is required by law to fulfill the following obligations:

Must offer enough space to accommodate the charter school's in-district students

Facilities offered must be reasonably equivalent to the facilities the charter school's students would attend if they were at District schools

Facilities offered must be contiguous, furnished, and equipped (Can be offered at more than one site if certain findings are made)

District must make reasonable efforts to provide the charter school facilities near to where they wish to locate



# Prop 39 - Annual Timeline

November 1	Prop 39 Facilities Request Form due
December 1	District submits objections to Charter School's ADA projections
January 1	Charter School response to Projection Objection Letter
February 1	District submits Preliminary facilities offer to Charter School
March 1	Charter School responds to Preliminary facilities offer
April 1	District submits Final facilities offer to Charter School
May 1	Charter School responds to Final facilities offer

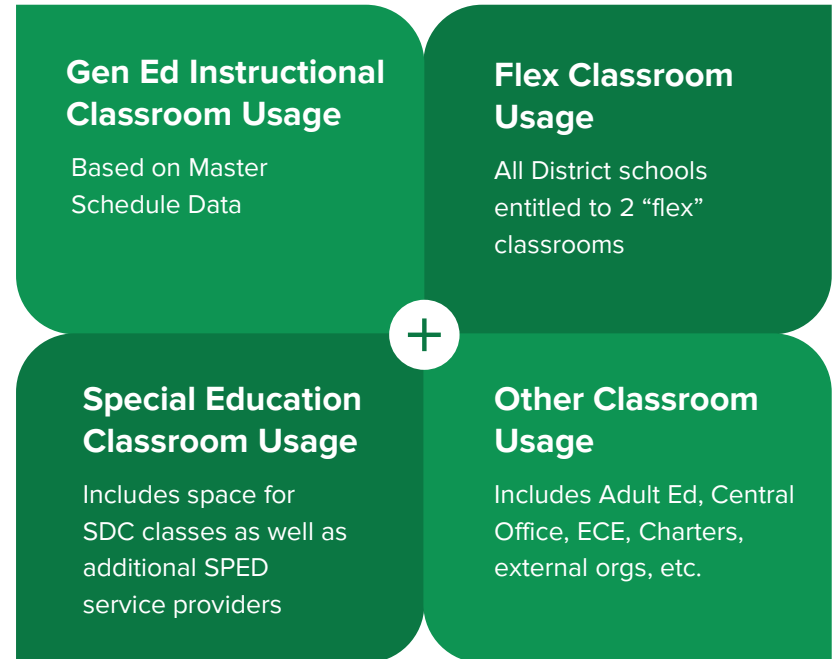
# Prop 39 - Charter School Classroom Entitlement

Charter Schools are entitled to classroom space based on their **in-district ADA** and space provided to students at a set of District-operated **comparison schools**. **The charter school's classroom entitlement is based on the average ratio of classrooms to ADA at their comparison district schools.**

For example, Charter School A's grades 6-8 comparison district schools had an average of 17.56 ADA per classroom. Charter School A's grade 6-8 ADA is 155.65, which entitles them to 9 classrooms for their middle school grades ( $155.65 / 17.56 = 8.86$  classrooms)

# Prop 39 - Using Utilization Data and Making Offers

- OUSD has discretion to choose which sites to offer, but **must make legally compliant offers.**
- The State does not determine *how* OUSD decides to make offers, just that OUSD must make “**reasonably equivalent**” offers of space to all charter schools that have requested it.
- Utilization calculations are a starting point for OUSD staff and Board members to understand where there might be underutilized space to include in a Prop 39 offer.



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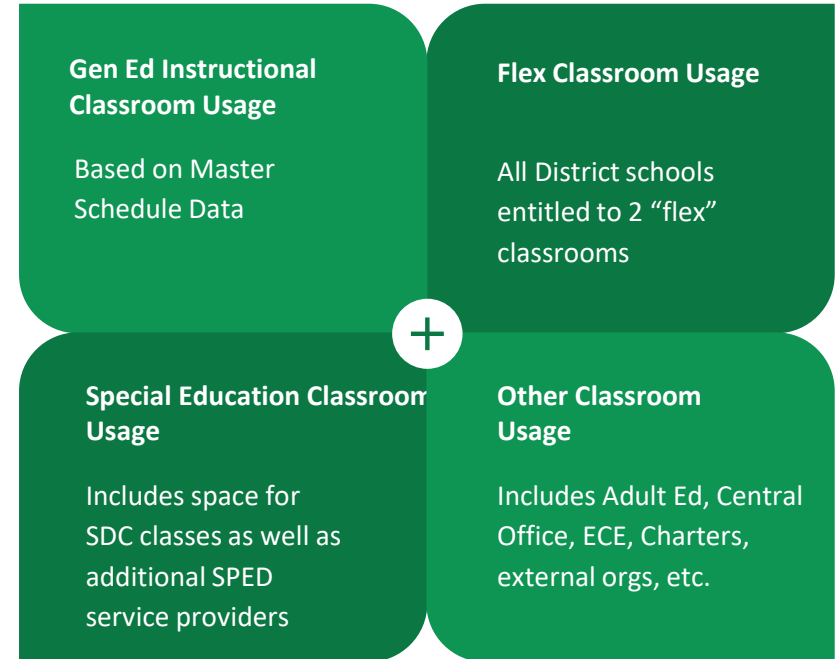
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For example, Charter School A's grades 6-8 comparison district schools had an average of 17.56 ADA per classroom. Charter School A's grade 6-8 ADA is 155.65, which entitles them to 9 classrooms for their middle school grades ( $155.65 / 17.56 = 8.86$  classrooms)

# Prop 39 - Using Utilization Data and Making Offers

- OUSD has discretion to choose which sites to offer, but **must make legally compliant offers.**
- The State does not determine *how* OUSD decides to make offers, just that OUSD must make “**reasonably equivalent**” offers of space to all charter schools that have requested it.
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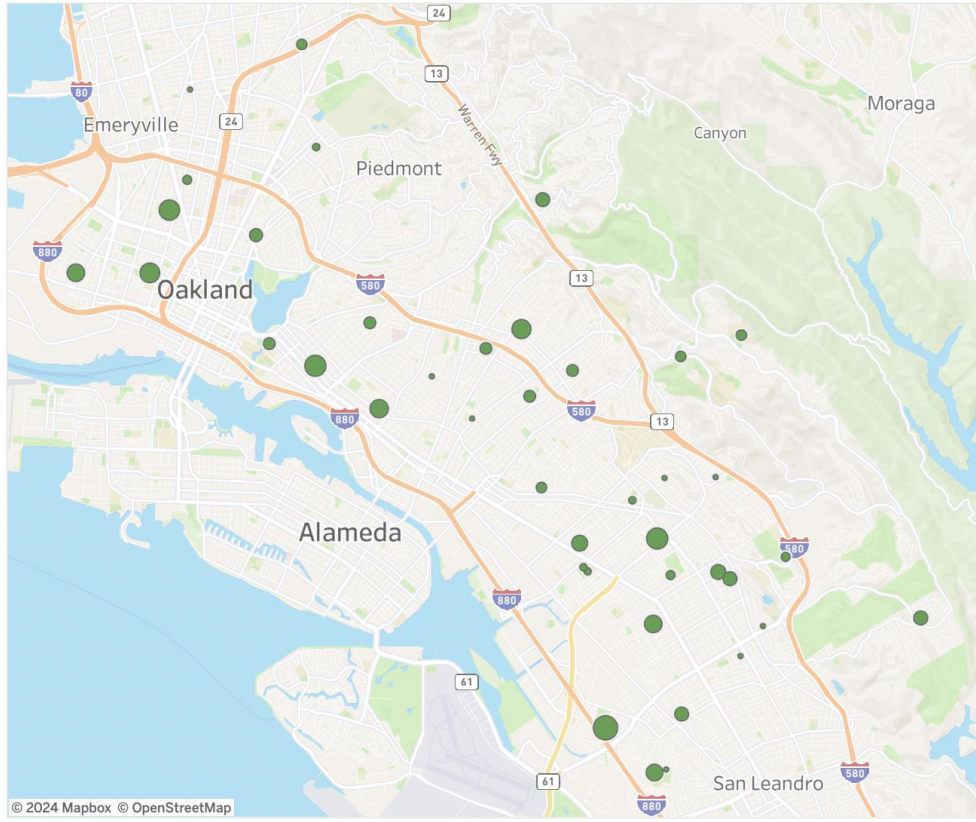
# OUSD Classroom Utilization

- OUSD has a standardized Facility Utilization Formula in order to assess the use of classrooms in District-owned buildings.
- OUSD is a full service community school district; classrooms are used as instructional spaces, but also serve as spaces to meet the needs of the entire OUSD community.

## Site Utilization = Total Classrooms - Total Footprint

- **Footprint** is the record of usage that includes the allocation of general education and special education day classroom; schools have access to these spaces regardless of the formula.
- **Classrooms** are defined as instructional spaces that are at least 600 sq. ft. Non-classroom spaces such as libraries, auditoriums, and cafeterias are not categorized as classrooms; schools have access to these spaces regardless of the formula.
- **Utilization** is calculated at the campus level; not at the individual school level, and includes all schools and programs located on campus.

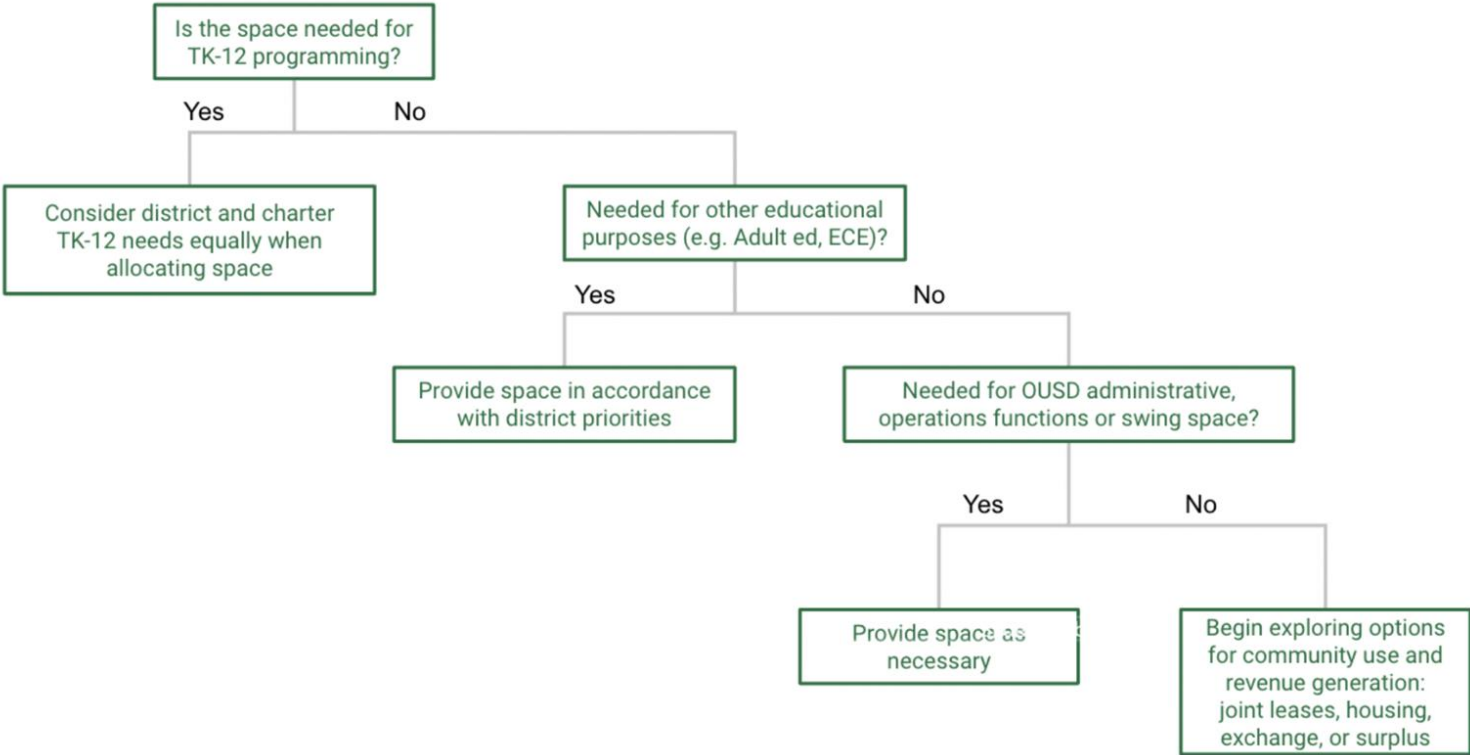
# OUSD Classroom Utilization, SY 2023-24



Count of Underutilized Classrooms by District	
District 1	Under = 7
District 2	Under = 38
District 3	Under = 49
District 4	Under = 39
District 5	Under = 2
District 6	Under = 44
District 7	Under = 68

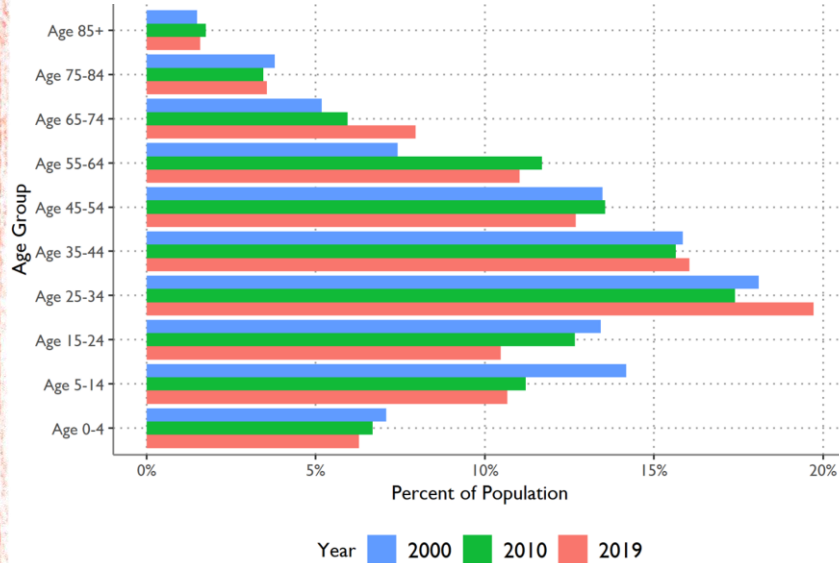


# Considerations for Use of Property Before Disposition and Revenue Generation

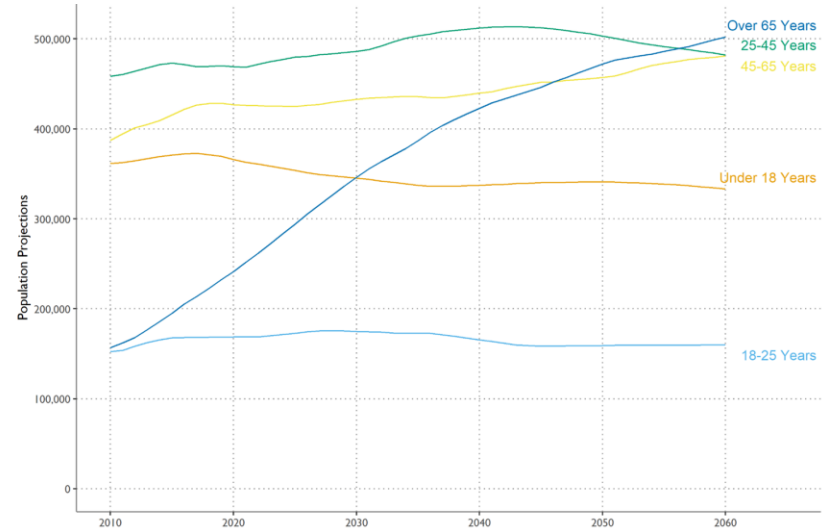


# Demographic Changes in Oakland

## Oakland Population by Age, 2000-2019



## Alameda County Age Projections, 2010-2060



Oakland's median age is 36.5 years. The proportion of individuals aged 65 and over in Oakland is increasing. This trend mirrors national and state patterns of longer lifespans and declining birth rates.

Sources: City of Oakland 2023-31 Housing Element, November 2022.

# District Staff Commute to Work by Bargaining Groups

Bargaining Group	Staff Living Outside of Oakland (%)	Staff Living 10 miles or more from Work Site (%)	Average Total Commute Time from Outside of Oakland	Average Total Miles Per Day
OEA	<b>65%</b>	33%	50+ mins	36 mi
OCDPA	<b>43%</b>	24%	40+ mins	25 mi
AFSCME	<b>42%</b>	30%	50+ mins	37 mi
BCTC	<b>75%</b>	61%	66+ mins	56 mi
Teamsters	<b>64%</b>	57%	62+ mins	61 mi
Overall	<b>59%</b>	25%	50+ mins	36 mi

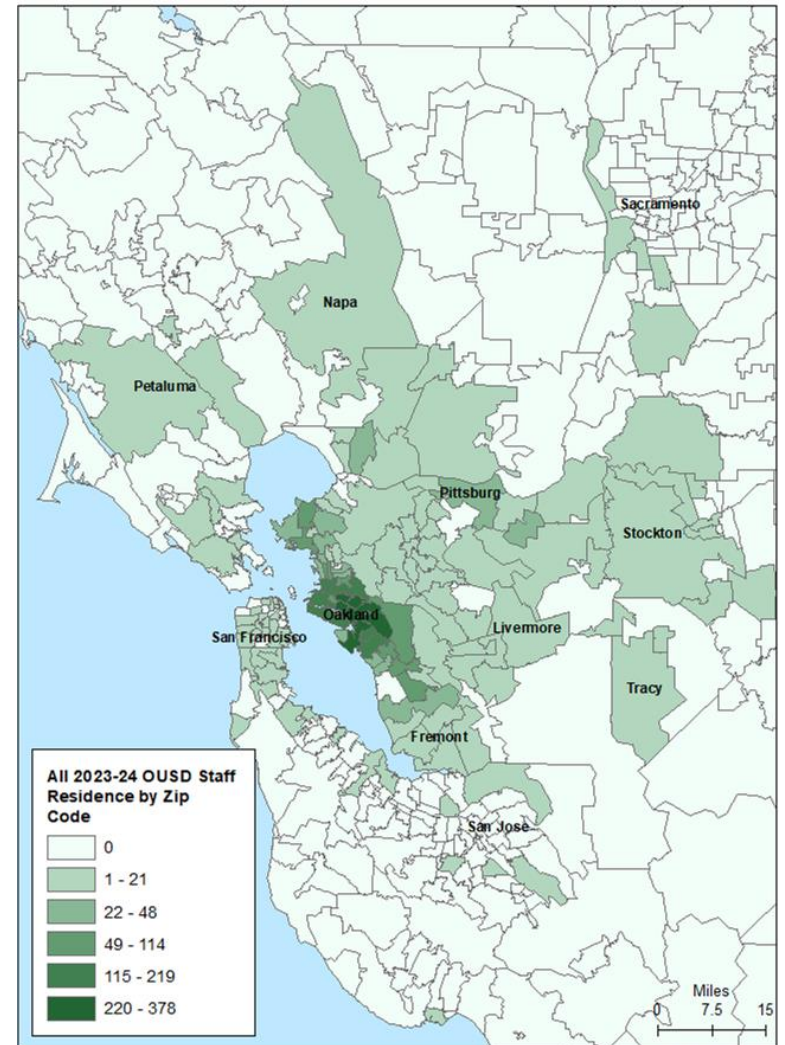
Source: OUSD Research, Assessment, and Data; All Staff Home Zip Codes and Positions

Note: Staff living outside of Oakland is inclusive of any person who lives outside of Oakland zip codes. Total average time and miles travelled is accounting for travel to and from site. Travel times have been calculated without traffic.

# Where District Staff Lives, 2024

Distance from Oakland	Count of Staff	% Staff
<10 mi	3,865	74.28%
11-20 mi	707	13.59%
21-30 mi	250	4.8%
31-40 mi	156	3.00%
41-50 mi	86	0.94%
>50 mi	139	2.67%

Source: OUSD Research, Assessment, and Data; All Staff Home Zip Codes and Positions.



# OUSD Longitudinal Staff Survey Retention Survey, 2024

## RESPONDENT CHARACTERISTICS

Do you own or rent a home/apartment/room? (n=10,870)						
	2018	2019	2020	2021	2022	2023
Own	40%	39%	49%	40%	41%	40%
Rent	50%	51%	41%	50%	50%	51%
Both own and rent	2%	1%	1%	1%	1%	1%
Neither own nor rent	1%	1%	1%	1%	1%	1%
Live rent free with family/friends	2%	3%	2%	2%	2%	2%
Homeless	<1%	1%	<1%	<1%	<1%	<1%
Decline to state	5%	4%	6%	6%	5%	4%

If you rent, is your rent subsidized (by family, friends, government, other programs, etc.)? (n=6,796)						
	2018	2019	2020	2021	2022	2023
Yes	11%	12%	12%	13%	13%	13%
No	89%	76%	75%	74%	76%	77%
Decline to State	0%	12%	13%	13%	11%	10%

Roughly what percentage of your monthly household income goes to pay for housing (rent or mortgage)? (n=10,870)						
	2018	2019	2020	2021	2022	2023
Under 15%	7%	5%	7%	4%	5%	5%
15-30%	27%	21%	27%	21%	21%	21%
30-50%	43%	38%	35%	39%	38%	35%
Over 50%	23%	24%	17%	23%	24%	26%
Decline to State	0%	11%	14%	12%	12%	13%



# OUSD Longitudinal Staff Survey Retention Survey, 2024

## RESPONDENT CHARACTERISTICS

How long is your daily commute (in one direction) to your work site? (n=10,870)

	2018	2019	2020	2021	2022	2023
Under 20 minutes	51%	51%	52%	53%	56%	55%
20-40 minutes	30%	32%	30%	31%	28%	30%
40-60 minutes	12%	12%	13%	12%	11%	10%
Over 60 minutes	7%	6%	5%	5%	5%	5%

How do you get to work? (Check all that apply) (n=10,870)

	2018	2019	2020	2021	2022	2023
Walk	7%	8%	9%	9%	9%	10%
Car	92%	91%	92%	90%	88%	89%
Bus	6%	6%	8%	6%	7%	7%
BART/Train	8%	8%	12%	7%	6%	5%
Bike	9%	7%	10%	9%	7%	7%
Motorcycle	1%	<1%	<1%	1%	1%	1%
Other	2%	3%	2%	3%	4%	4%



K-12 EDUCATION