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Board Cover Memorandum

To Board of Education

From Kyla Johnson-Trammell, Superintendent
Preston Thomas, Chief Systems & Services Officer
Pranita Ranbhise, Director of Facilities Planning & Management

Meeting Date June 18, 2025

Subject Asset Management & Real Property Services - Updates & Next Steps

Ask of the Board The Board will receive an update on proposed next steps, including feasibility study priorities, staff engagement strategies, and scoping for Phase II asset review.

Background In alignment with Board Resolution 2324-0155, the District contracted with Devine & Gong, Inc. and Brookwood Partners to support asset management and real property evaluation services across underutilized and vacant properties. The work is being delivered in two phases.

To comprehensively study all vacant properties, the project is staged in two phases:

- **Phase I:** Focused on three key sites - 1025 2nd Ave (Former Administrative Building), Lakeview, and Ralph J. Bunche Academy - to establish baseline valuation, understand development trade-offs, and refine the District's overall strategy based on Board priorities.
- **Phase II** will evaluate the remaining sites, incorporating the learnings from Phase I to take a more tailored approach. Phase II sites can include Golden Gate CDC, Hillside at Castlemont, Bond Street Annex School, Former Edward Shands Adult Education Center, Former Tilden CDC, and Piedmont CDC. Based on Board feedback, Phase II can include the Old Chabot Space and Science Center and the Urban Montessori Charter School site (Tilden Campus).

This work is critical to support the District's long-term goals related to fiscal sustainability, educational alignment, and broader community benefit.

Discussion This presentation is a follow-up from the Asset Management Study Session from May 8, 2025. Information presented will focus on:

- **Staff Survey – Housing and Asset Management Strategy**
 - Goal: Gauge staff interest and demand for housing and other asset strategies.

- Survey themes include: employment status, housing and commute, household size, and housing interest.
- Planned for presentation at the June 2025 Facilities Committee and launch in August.
- **Feasibility Studies – Scope and Purpose**
 - **Technical assessments:** environmental (Phase 1), structural (if needed), geotechnical, utilities, traffic/parking, fire safety.
 - **Program and design:** demand analysis, massing studies, reuse plans, parking/phasing strategies.
 - **Financial analysis:** budgeting, PLA impact, pro forma, funding source review.
 - **Benefits:** clarifies project scope, reduces risk, supports strong RFPs, and improves partner selection.

Next Steps include:

- Board formally requests staff to conduct feasibility studies for Phase I sites to inform potential Request for Qualifications/Proposals
- Board to finalize the scope of Phase II properties
- Analyze project delays at Edward Shands and Tilden CDC
- Staff survey distribution

Fiscal Impact

Costs associated with potential feasibility studies that are identified as part of the next steps and the Phase II scope of work.

Attachment(s)

Presentation: Asset Management - Updates & Next Steps.

Asset Management

Updates & Next Steps

June 18, 2025

Facilities Committee Meeting, June 18, 2025

OUSD Facilities Planning & Management in Partnership with Devine & Gong,
Inc. & Brookwood Partners



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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



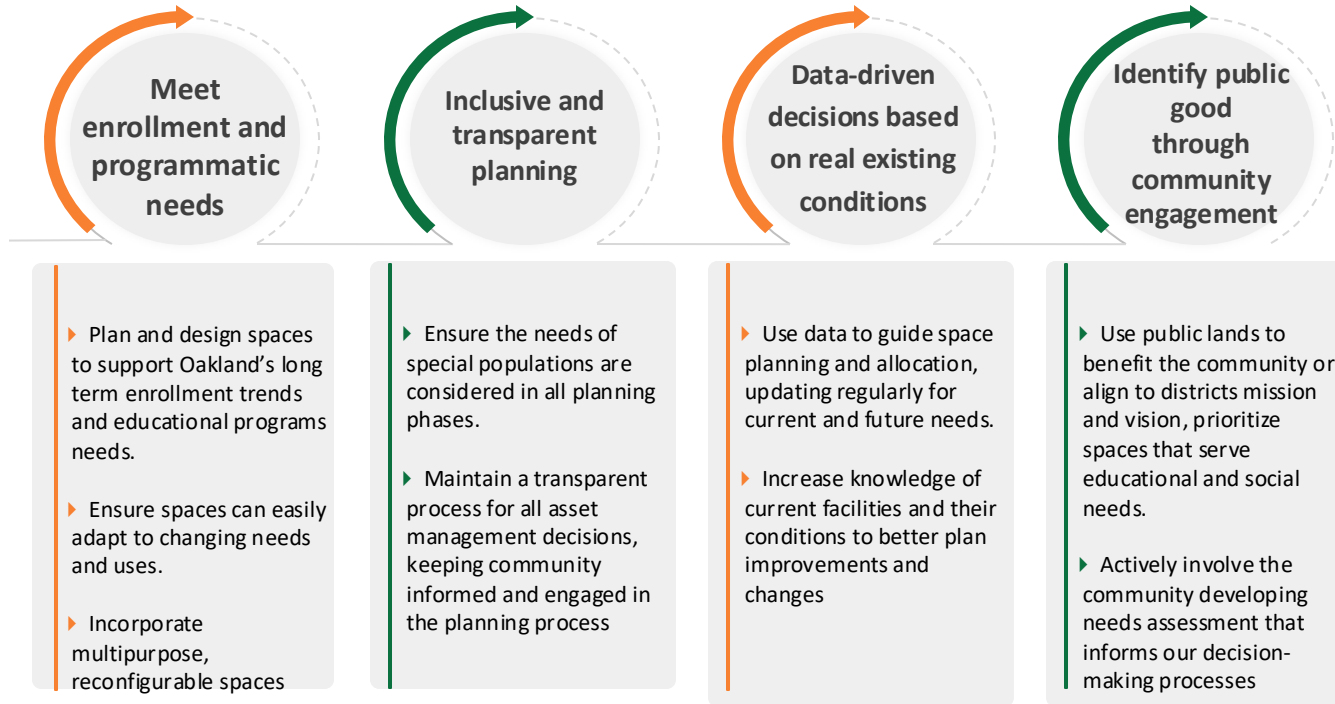
Growing a Diverse and Stable Staff

Attracting and Retaining Staff Reflective of
Oakland's Rich Diversity



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Board Guiding Principles for Asset Management



Collaboration with public agencies

- ▶ Work closely with the City of Oakland and other public agencies to address shared property issues and streamline processes.
- ▶ Seek collaborative solutions for permit approvals and other bureaucratic challenges

Agenda

- Asset Management Project Context and Timeline
- Discussion of Next Steps
 - Feasibility Studies for Phase I Properties
 - Distribution of Staff Survey
 - Evaluation of Phase II Properties



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Brookwood
Partners

Asset Management and Real Property Services

Project Objective:

- Conduct a comprehensive evaluation of the District's vacant properties to determine their value, feasibility, and potential benefits
- Develop a structured approach to prioritize sites and align with Board objectives

Key Approach and Reasoning: Two-phase process to assess all vacant properties.

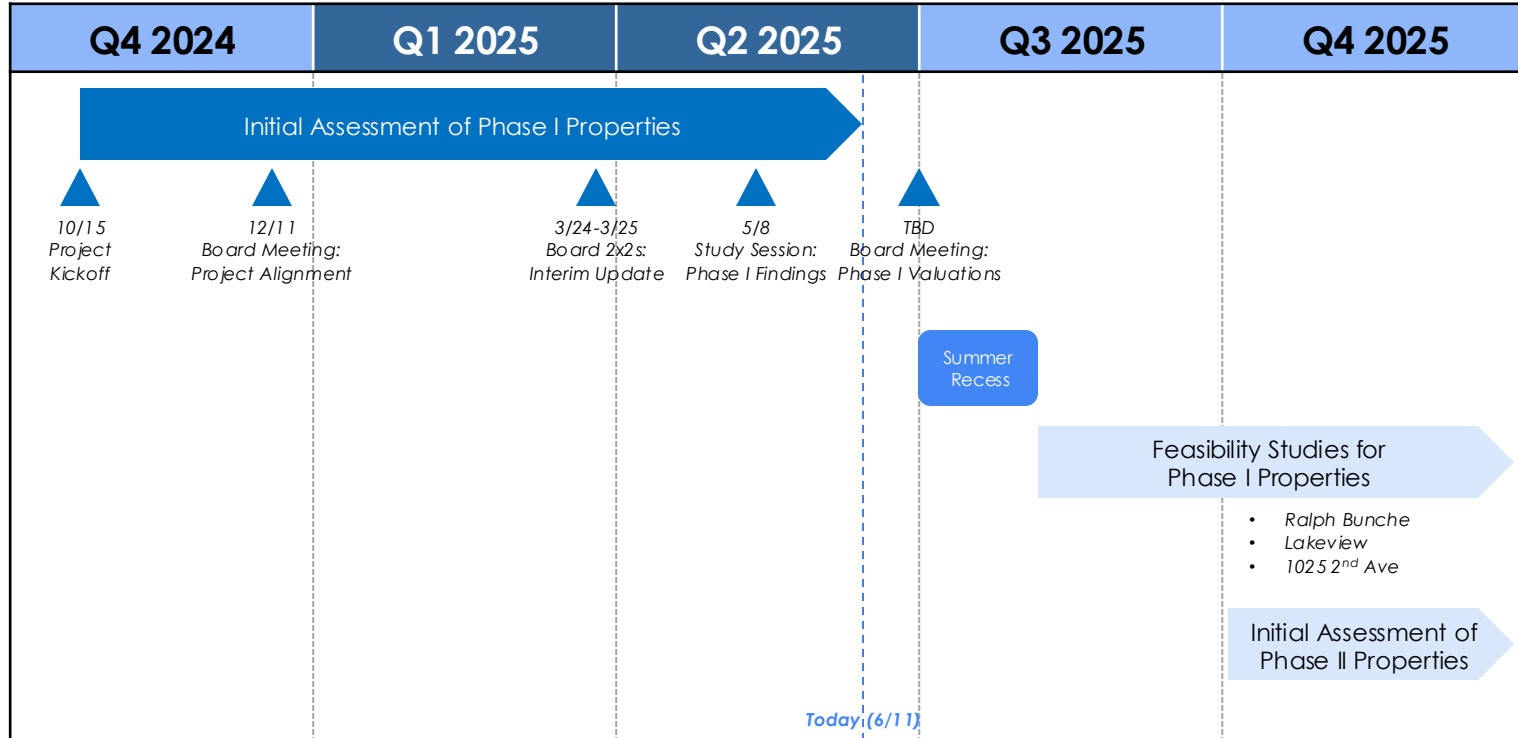
- **Phase I** focuses on three sites to refine evaluation methods
 - Sites: **1025 2nd Ave, Lakeview, Former Ralph J. Bunche Academy**
 - Goal: Identify key issues, feasibility, and trade-offs
 - Timeline: Q4 2024 to Q2 2025
- **Phase II** applies insights from Phase I to remaining sites
 - Sites Added: Old Chabot Observatory, Tilden Campus (formerly Urban Montessori)
 - Focus: Apply lessons from Phase I for deeper analysis
 - Timeline: Q3 2025



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Asset Management Project Timeline



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Brookwood
Partners

Next Steps Presented at the Study Session – 5/8/2025:

1. **Board Directors to work with staff over the summer to bring forward formal recommendations for feasibility studies** to a future Facilities Committee or a Board meeting as a new legislative item based on the options explored during the study session.
2. **Distribute an OUSD all-staff survey** to receive an accurate picture of support and demand for housing options when staff returns from summer.
3. **Study Phase II sites** at a similar level of depth to Phase I, in accordance with Board preferences around specific sites to prioritize.



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Feasibility Studies: Scope and Purpose

Scope of Feasibility Study

- **Technical Due Diligence**
 - Environmental (Phase 1 Site Assessment)
 - Structural (if required)
 - Geotechnical
 - Slope and grade
 - Utility capacity
 - Traffic impact (Lakeview) and parking
 - Fire safety considerations
- **Programming and Design**
 - Market/employee demand analysis
 - Formal massing studies
 - Existing building reuse plans
 - Parking and phasing strategies
- **Financial Analysis**
 - Construction cost budgeting
 - Cost analysis of PLA requirements
 - Operating proforma
 - Review of funding sources and analysis of financial feasibility
 - Competitiveness for public funds

Key Benefits

1. **Refines project** objectives, program, and conceptual design
2. **Develops necessary technical documentation** for RFP
3. **Reduces risk & uncertainty** to increase interest from development partners
4. **Informs evaluation & selection criteria** to ensure selected project partner can execute

*Note: Feasibility studies for each Phase I property could study **affordable housing, workforce housing, or both.** Narrowing the set of options studied will help focus the analysis and reduce cost.*



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Staff Survey

Goal: Gauge support and demand for housing and other asset management strategies, and develop a detailed understanding of employees' housing needs.

Themes of Questions:

- Employment Status
- Current Housing Situation
- Commute Time
- Housing Needs
- Household Size/Composition
- Interest in Housing

Sample survey questions

Question 16: Knowing that the funds used to pay for housing do not come from the District's General Fund, which is used to pay salaries and benefits, would you be supportive of OUSD building workforce housing for employees even if you didn't expect to live there? *

- ☐ Yes
- ☐ Maybe
- ☐ No
- ☐ N/A: I hope to live in workforce housing

Question 17: If the District provided affordable employee housing, would you consider living there? *

- ☐ Definitely
- ☐ Likely, but I want more information
- ☐ Maybe
- ☐ Probably not



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Phase II Properties

- **Proposed Analysis:** Similar level of depth as was conducted in Phase I, focusing on:
 - High-level assessment of potential of each site for community impact, affordable/unhoused housing, and workforce housing
 - Estimate of as-is value
- **Potential Properties:** Priority sites asterisked based on size, location, and expressed interest:
 - Golden Gate CDC*
 - Old Chabot Observatory*
 - Tilden Campus (*formerly Urban Montessori*)*
- **Not suitable for potential development** due to size or current status of property usage
 - Hillside at Castlemont (*potential demo*)
 - Piedmont CDC (*potential for community use*)
 - Edward Shands (*currently in a ground-lease*)
 - Tilden CDC (*currently in a ground-lease*)
 - Other - Bond St. Annex



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APPENDIX

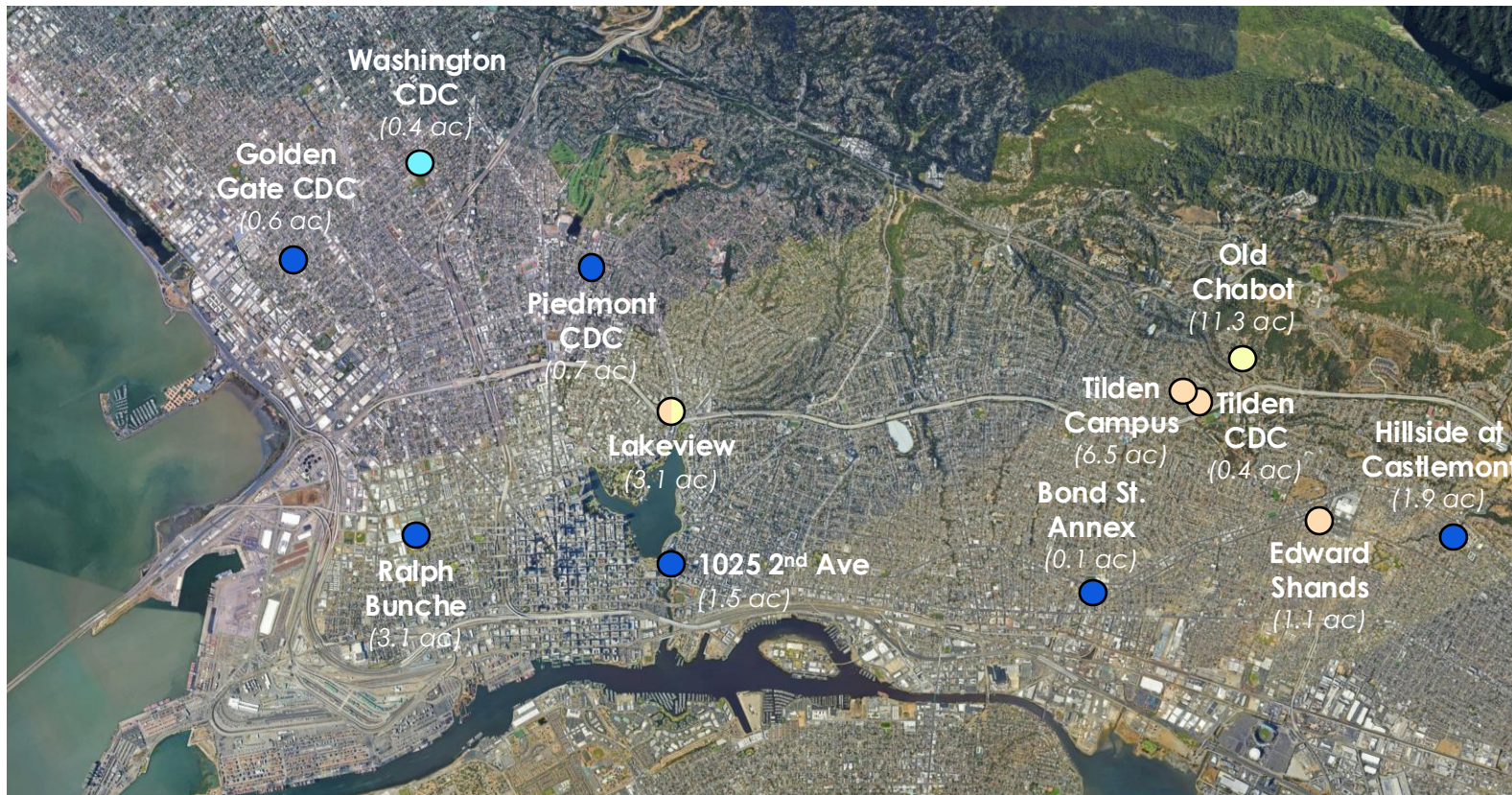


Background

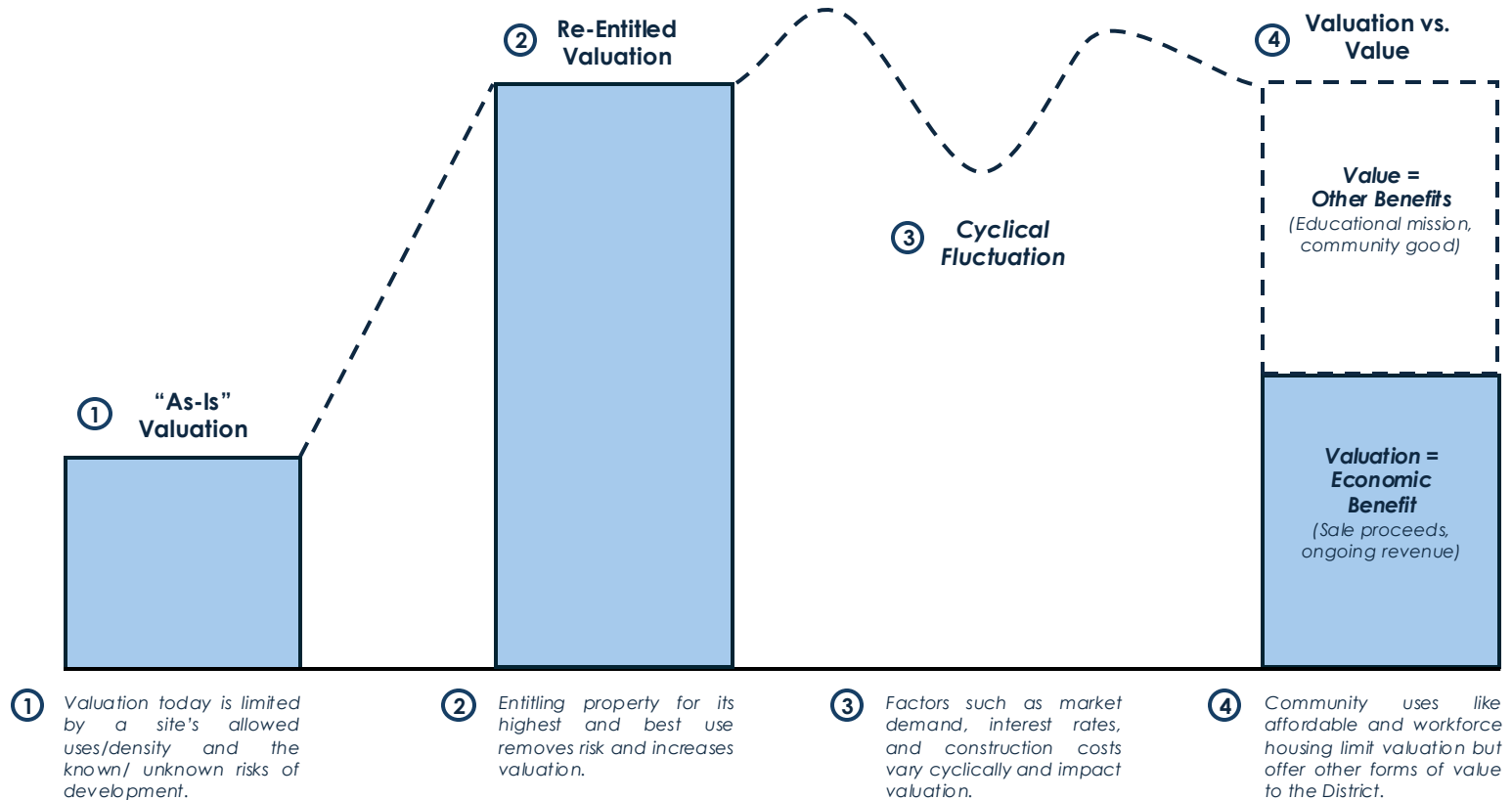
- **October 30, 2023** – Town Hall on future affordable housing at unused OUSD sites (Former Director Sam Davis & Director Jennifer Brouhard).
- **January 2024** – Facilities Committee Meeting: Asset Management Overview & Summary. Review of Board Policy 7350 and prioritization. (24-0191)
- **January 2024** - Adoption by the Board of Education of Resolution No. 2324-0155 Prioritizing the Disposition and Use of Unutilized District Properties. (24-0100)
- **April 2024** – Board Study Session: Real Property Asset Management overview of OUSD assets, challenges, current leased/vacant properties, and vision for surplus properties. (24-1162)
- **May 2024** – RFQ/P for Asset Management and Real Property Services regarding 1025 Second Ave closed with no responses.
- **June 2024** – Facilities Committee Meeting: Asset Management updates on long-term ground leases at three OUSD properties. (24-1671)
- **September 2024** – Initial tour of Jefferson Union School District Educator Workforce Housing project.
- **October 2024** – Board 2x2: Tour of Jefferson Union School District Educator Workforce Housing project.
- **October 2024** – Board Study Session: Real Property Asset Management updates on guiding principles, consultant scope, and workforce housing initiatives. (24-2661)
- **October 2024** – Approval of Services Agreement with Devine & Gong Inc. and Brookwood Partners
- **December 2024** – Phase I Property Discussion in Closed Session (no action)

OUSD Vacant, Leased, or Underutilized Sites

● Vacant
 ● District Use
 ● Leased
 ● Pre/TK Expansion



Fundamentals of Real Estate Valuation



Executive Summary: Property Options

	"As Is" Sale	Entitled Sale	Affordable/ Unhoused Housing	Workforce Housing	Market Rate Housing
Description	Property sold in "as is" condition	District adds value by entitling the property for redevelopment before selling	Donate or lease land to developer to construct affordable housing for the public	Construct housing for faculty & staff, developed by District or private developer	Generate long-term revenue via ground lease for market-rate housing development
Direct Benefits	One-time funds	One-time funds, improved land value (subject to market)	Possible modest sale or lease income	Attract & retain high quality talent; possible future revenue stream	Future revenue stream
Indirect Benefits	-	-	Help stabilize Oakland residents/families	Competitiveness with peer districts	Participation in future appreciation
Disadvantages / Challenges	Limited sale value in down market; loss of future upside potential	City approvals take time & money (~\$1.5 to 2M and 1-2 years)	Requires ~\$800K to \$900K per unit in public sources; Measure U funds are earmarked for other projects	Requires ~\$700K to \$900K per unit in subsidy (e.g., GO bond funds, property sale proceeds)	Subject to real estate market recovery; politically sensitive
Timeline	1-1.5 years	2-3 years to entitle & sell (increase in value depends on market recovery)	5-10 years	5-7 years	Depends on market recovery
Next Steps	<ul style="list-style-type: none"> ● 7-11 Committee ● Brokered sale 	<ul style="list-style-type: none"> ● 7-11 Committee ● City approvals ● Brokered sale 	<ul style="list-style-type: none"> ● 7-11 Committee ● RFP for developers 	<ul style="list-style-type: none"> ● Feasibility study ● Funding strategy 	<ul style="list-style-type: none"> ● 7-11 Committee ● RFP for developers

Note: As-Is Valuation represents appraised value of the property today as unentitled.