Project Questions

1. What are the current costs of underinvestment in school facilities in Oakland USD? How do Oakland USD’s facilities M&O budget trends compare to other California school districts and industry standards for achieving healthy and educationally adequate facilities?

2. How can school districts communicate the importance of funding school facilities maintenance and operations? What tools and resources do districts need to facilitate the participation of parents, students, and communities in facilities planning that promotes educational quality, health and safety, and value in public spending?

Methods for Creating Effective Benchmarking

Current Replacement Value: The current dollar cost of replacing a facility with one similar capacity and function. Oakland USD’s CRV was calculated by multiplying the district’s total square footage (assessed in 2011-2012) by a new construction cost estimate ($400 per square foot)

CRV = Total Facilities Square Footage (actual Oakland USD SQFT) x $400 per square foot new construction cost

Cost of Facility M&O: According to the Association for Physical Plant Administrators (APPA), 2–4% of the current replacement value (CRV) of a building should be spent on maintenance every year. Our calculation used 3% CRV.

APPA Best Practice Yearly Maintenance and Operation Expenditures (actual Oakland USD expenditures) = CRV x 3%

Deferred Maintenance: The difference between Oakland USD’s annual M&O expenditures and the amount required to maintain a school facility in good repair according to APPA.

Deferred Maintenance Estimate (for selected years): APPA Best Practice Yearly Maintenance Expenditures - Actual M&O Expenditures

Benchmarking Oakland USD M&O Expenditures Against Industry Best Practices

Figure 3 depicts the annual expenditures Oakland USD made between 2002 and 2011 on facility operations and maintenance and the resulting deferred maintenance totals. Over the ten years of analyzed data, Oakland USD’s annual M&O expenditures trended downward and the annual deferred maintenance totals increased. During this time span, deferred maintenance totaled grew at a yearly rate of 2.38 billion. During this same 10-year period, the estimated accumulated deferred maintenance totaled over $183,000,000.

Based on the industry assumption that every $1 of deferred maintenance is estimated to result in an additional $4 of future needed capital improvements, the district’s estimated accumulated deferred maintenance between 2002-2011 will result in estimated additional capital outlays of $730,000,000.

Benchmarking Oakland USD M&O Expenditures Against Comparable School Districts

Table 2 shows that Oakland USD spends $8.29 on maintenance per square foot, which is more than Fresno Unified and Sacramento City Unified but less than Long Beach Unified. Table 2 also shows maintenance spending per student enrolled in the 2010-2011 calendar year. Oakland USD SPED costs per pupil is higher than Long Beach and Fresno USD. Oakland USD’s data indicators are not outliers, with comparable districts M&O expenditure and staffing indicators falling both above and below Oakland’s. This suggests that districts across the state may be collectively struggling to adequately maintain and operate their facilities. Exogenous factors, irrespective of local district environments, may be affecting local districts’ ability to achieve good performance.

Strategic Advocacy: Communications Toolkit

To increase support for facilities on behalf of parents and district leaders, we designed a toolkit of resources intended convey the importance of facilities in context of the new accountability landscape under LCFF.

Vision for the Toolkit

The toolkit is designed as a resource for individuals who are interested in making the case for appropriate investment in facilities in their school district. Each resource seeks to educate a diverse range of audiences on key issues in facilities and what they could do to support school facilities in their district in context of LCFF.

Inside the Toolkit

The toolkit starts with a primer giving a “crash course” on promoting facilities in light of LCFF, followed by a series of stand-alone resources that can be shared to that end.

Primer: School Facilities in the Era of LCFF

Facilities funding in California over the years

Good repair and facilities inspection

The importance of Adequate Investment in School Facility Maintenance

School facilities 101: The Good in Good Repair

School Facilities Budgeting and Training Simulation Tool

Sample Resources

The content of each of these resources corresponds to the color of the titles listed above.

Data Sources

- Use the toolkit’s primer to understand how changes at the state level are impacting your school district.
- Explore and share the resources within this document to promote facilities in your district.
- Use the toolkit as a training tool for parents participating in LCAP engagement committees.