



5.0

INVESTMENT
FRAMEWORK



Claremont Multi-Purpose Room (MPR) Modernization Project

5 Investment Framework

5.1. Purpose

The Problem OUSD Must Solve

The District faces two core challenges. **First**, every school needs baseline facility improvements to support health, safety, daily operations, and functional learning environments. **Second**, some campuses have deeper issues—such as major building deficiencies, enrollment pressures, or program needs—that require modernization, redesign, or significant reinvestment beyond routine repairs.

This is compounded by limited capital funding and the need to balance equity with impact. If resources are

spread too thinly, major problems remain unresolved. If investments are concentrated only at a few campuses, other schools may fall further behind.

Needs are widespread, but the depth of need is uneven across the portfolio, requiring a strategy that balances equity with impact. To address this challenge, the FMP is introducing a T-shaped investment strategy.

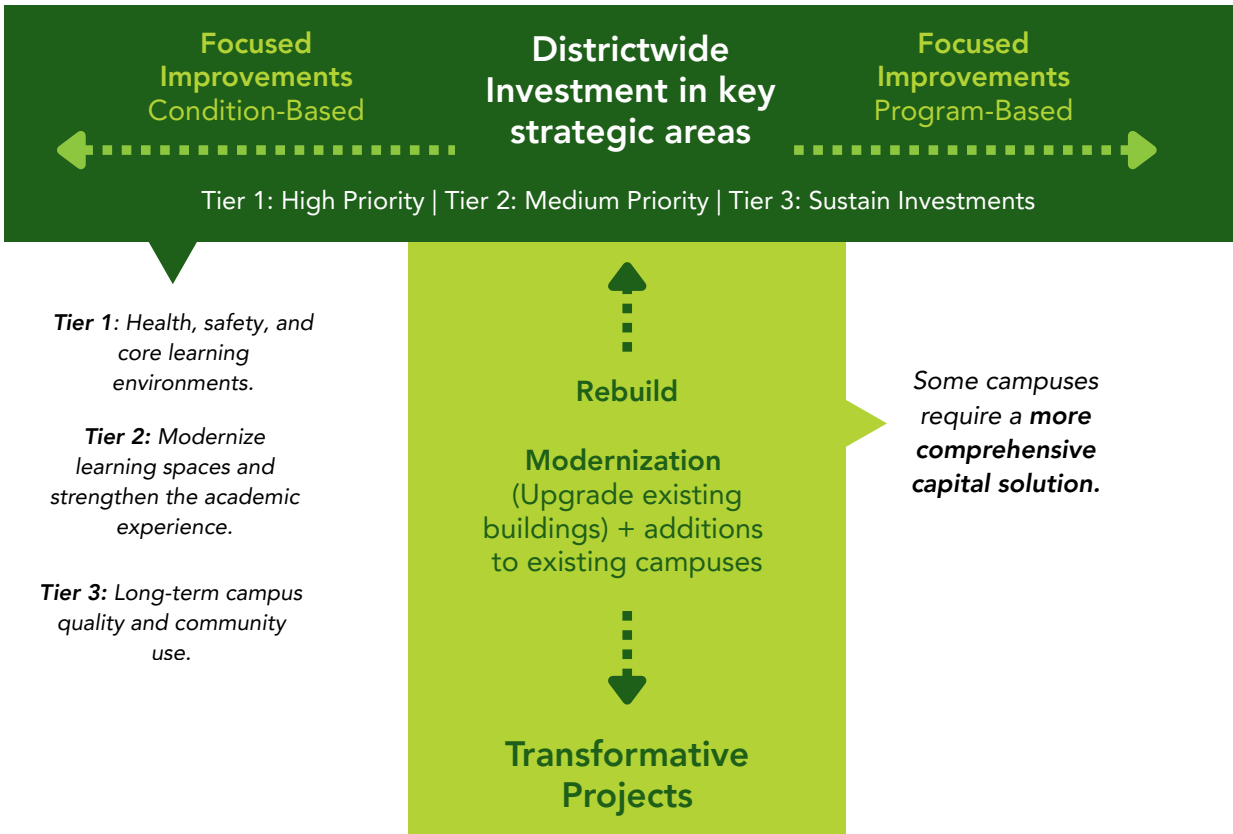


Figure 41 Tiers of Implementation and Types of Projects under T-Shaped Investment Strategy



5.2. T-shaped Investment Strategy

This framework provides a structured approach that supports consistent improvements across the entire portfolio while also enabling transformative change where it is most needed. It allows OUSD to advance Districtwide priorities through a shared baseline of investments, while also identifying and resourcing a smaller set of transformative projects.

A PREDICTABLE AND TRANSPARENT WAY TO BALANCE

This strategy provides a predictable and transparent way to balance the need for widespread improvements across all schools with the need for deeper, transformative investments at a smaller number of campuses. It recognizes that every school requires safe, functional, and modern learning spaces, yet also acknowledges that some campuses face conditions or programmatic needs that require a more comprehensive and long-term capital solution.

THE T-SHAPED INVESTMENT MODEL INCLUDES TWO COMPLEMENTARY COMPONENTS.

The top of the T represents Districtwide focused priorities. These investments are smaller in scope, highly targeted, and implemented across many schools. The purpose is to address the most urgent needs that affect day-to-day operations and the quality of the core learning environment for the greatest number of students.

The vertical stem of the T represents deep investments at a limited number of schools. These projects are major in scale and have the potential to fully transform facilities through new construction, significant modernization, or complete campus rebuilds.

Together, these strategies create a balanced approach that meets immediate needs while advancing long-term District goals.

USING THE T-SHAPED STRATEGY TO GUIDE FUTURE DECISION MAKING

The T-shaped strategy provides a balanced and equitable framework that supports both near-term improvements and long-term transformation. Districtwide investments address the immediate needs that students and staff face every day, while deep investments advance the structural changes needed to ensure sustainability, modern learning environments, and improved operational efficiency.

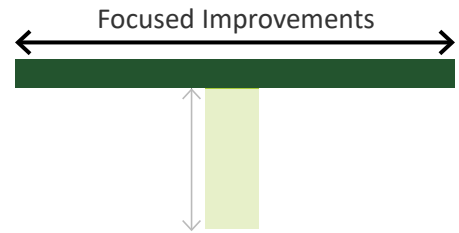
This balanced approach allows OUSD to:

- Improve conditions for all students through widespread focused investments.
- Identifies a smaller number of schools for major, high-impact projects that address multiple priorities at once.
- Align capital planning with enrollment trends, District educational priorities, and long-term financial considerations.
- Provide consistent, predictable upgrades across the District while also creating transformative campuses that serve as community anchors.

The T-shaped investment strategy balances smaller upgrades across all schools with larger, transformative investments at a few campuses.

This approach improves day-to-day learning conditions while strengthening community trust, and supporting future academic and operational goals.

5.3. Districtwide Focused Improvements



Districtwide improvements are essential because they address the basic reliability and functionality of school buildings across the entire portfolio. These upgrades are often condition based or program based and can be sequenced over time to bring consistent improvements to all OUSD students.

Focused Improvements (Condition Based)

These projects target the physical conditions that most directly affect health, safety, and the core learning environment. Examples include:

- Education adequacy improvements that enhance classroom usability and support instructional practice.
- Facility system improvements such as HVAC, plumbing, electrical upgrades, lighting, and flooring.
- Restroom modernization.
- Fencing, seismic, and safety upgrades.
- Addressing deferred maintenance needs that have accumulated across aging buildings.

These projects typically do not require substantial reconfiguration of the campus and can be implemented at many schools within a short period of time. Their purpose is to keep buildings functional, compliant, and safe for students and staff.

Focused Improvements (Program Based)

Program-based investments support District initiatives, educational pathways, and student experience goals. Examples include:

- Space expansion for TK and early childhood programs.
- Specialized program upgrades such as STEM, arts, and CTE.
- Special education supportive spaces.
- Living schoolyards, outdoor learning areas, and safety improvements.
- Technology enhancements to support 21st-century classrooms.

These investments often respond directly to enrollment needs, programmatic goals, or equity commitments. They improve the learning experience and support school communities without requiring a complete rebuild.



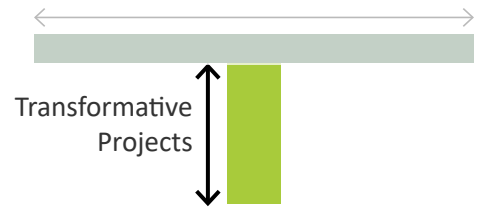
Focused improvement: Claremont Middle School Kitchen



Program Expansion: Kaiser Early Childhood Center



5.4. Transformative Projects



While Districtwide improvements provide essential upgrades across many schools, some campuses require a more comprehensive capital solution due to major facilities deficiencies, high replacement value, aging systems at end of life, and the scale of deferred maintenance that cannot be resolved through incremental repairs.

Rebuilds

These projects involve rebuilding a school through new construction and completely reimagining the campus. They provide:

- Modern classrooms with flexible learning spaces.
- Energy-efficient systems and updated infrastructure.
- Full replacement of legacy systems and high deferred maintenance.
- Strong alignment with emerging instructional models.
- Improved campus identities that support enrollment and attract families.

Transformative projects also allow the District to reset building age, reduce operational costs over time, and create flagship campuses that serve as models for future development. They often require boundary adjustments and thoughtful planning related to temporary relocation during construction.

Modernization (Upgrade Existing Buildings Or Additions to existing campus)

Major modernization retains existing structures but significantly upgrades systems, learning environments, and campus functionality. Advantages include:

- Lower initial cost because it builds on existing infrastructure.
- Ability to improve learning environments without full displacement.
- Extension of building life and preservation of community-valued spaces.
- Flexibility to target essential systems or site-specific needs.

These projects offer meaningful improvements with less disruption, although they may not fully resolve legacy infrastructure challenges or reimagine the campus to the same extent as a full rebuild.



Fremont High School Rebuild



Madison Park Academy Modernization

5.5. Implementation Tiers for Districtwide Focused Improvements

The FMP organizes Districtwide investments into three tiers. These tiers help the District sequence projects based on facilities conditions, school enrollment, gaps in education adequacy, align them with community priorities, and create a manageable and predictable capital program.

Tier 1: High Priority Area	Tier 2: Medium Priority Area	Tier 3: Sustain Investments
PRIORITIZE HEALTH, SAFETY, AND THE CORE LEARNING ENVIRONMENT.	BUILD WHOLE-CHILD EXPERIENCES, EDUCATIONAL EQUITY, AND LONG-TERM INNOVATION.	MAINTAIN PARTNERSHIP, PRIDE, AND LONG-TERM SUSTAINABILITY.
The purpose of Tier 1 is to protect the basic functionality and safety of schools. Projects in this tier include: • HVAC modernization and air quality improvements • Water quality, plumbing, and electrical system upgrades • Restroom modernization • Fencing, lighting, seismic upgrades, and other safety improvements • Deferred maintenance for roofs, floors, and similar needs These investments respond to the most urgent and non-negotiable facility concerns.	Tier 2 investments modernize learning spaces and strengthen the academic experience. Examples include: • TK and early childhood expansion • Specialized program upgrades, including STEM, arts, and CTE • Special education facility improvements • Multipurpose spaces, dining hall upgrades, and kitchen modernization • Technology infrastructure improvements These investments significantly elevate the student experience and help the District advance equity and programmatic goals.	Tier 3 focuses on long-term campus quality and community use. Projects include: • Athletic field and gym upgrades • Outdoor learning environments and shaded areas • Energy efficiency, solar, and EV infrastructure • Maintenance of solar systems through ongoing operations and maintenance to preserve long-term energy savings. These investments sustain the quality and functionality of school campuses and strengthen community connection.



Before



After



Living Schoolyard project at Joaquin Miller Elementary School

5.6. Facilities School Design Thresholds Framework for Transformative Projects

The Facilities School Design Thresholds Framework reflects a synthesis of national research, best practices in school design, and demonstrated success within the Oakland Unified School District. Research consistently shows that school structure shapes instructional quality, student experience, and long-term sustainability. Studies from state and national sources indicate that mid-sized schools are best positioned to support strong academic programming, efficient operations, and stable staffing structures, balancing economies of scale with personalized learning environments.

Data Sources

These recommendations are informed by guidance and data from the California Department of Education the National Center for Education Statistics, CDE's Guide to School Site Analysis and Development, and the Coalition for Adequate School Housing which emphasizes aligning school size and site capacity with the educational program a campus is designed to support. Together, these sources reinforce a functional, program-driven approach to facilities planning. This framework builds on these findings and is grounded in established models, including Professional Learning Communities, Linked Learning pathways, and Multi-Tiered Systems of Support, and is reinforced by local schools where cohort-based structures have strengthened outcomes, collaboration, and program stability.

Cohort-Based Design Approach

At its core, this framework advances a cohort-based design approach for transformational major bond projects. Students are organized into stable grade-level teams or pathway communities, supported by educators who share responsibility for instruction, planning, intervention, and student support. This structure enables consistent collaboration, inclusive practices, and sustained academic and enrichment programming aligned to community school models.

Flexible, Program-Driven Design Targets

While presented through a facilities lens, these school-size ranges are intended to serve as design targets for major transformational investments (modernizations/rebuilds), rather than as fixed requirements for all sites.

Facilities School design decisions should be grounded in academic program priorities, enrollment trends, operational efficiency, and financial sustainability.

Together, these elements ensure that new investments and modernization efforts are aligned to create sustainable, high-quality schools that support strong instructional outcomes.

This framework establishes clear, research-aligned ranges for school size and structure, providing a consistent foundation for planning, investment, and portfolio decisions. It reflects both national evidence and Oakland's lived experience in designing schools that support strong instructional models, and is grounded in a cohort-based approach that organizes students into grade-level groups based on enrollment and contractual class size. Each cohort represents a full set of classrooms within a grade, enabling teacher collaboration, flexible grouping, and coordinated supports, while aligning staffing, scheduling, and facilities to support effective and sustainable instructional models.

ELEMENTARY (TK–5)

Elementary schools serving 500–650 students with three to four cohorts per grade create the conditions for strong instructional collaboration, flexible grouping, and consistent intervention. This structure supports inclusive special education through co-teaching and shared supports, while sustaining enrichment and counseling services. At this scale, schools are more resilient to enrollment shifts, reduce per-pupil administrative costs, and support deeper investment in facilities and programming. Strategically designed elementary schools strengthen collective teacher efficacy and improve learning conditions for students.

MIDDLE SCHOOL (6–8)

Middle schools enrolling 700–900 students, organized into Professional Learning Communities serving approximately 350–450 students, balance belonging with access to opportunity. Team structures enable coordinated instruction, shared interventions, support content-specific collaboration, and consistent expectations. This scale supports robust electives, inclusive special education services, and stable scheduling. Operationally, it allows efficient staffing of counseling and leadership while improving resilience



to enrollment changes. Team-based middle schools strengthen engagement, achievement, and student persistence.

TK–8 SCHOOLS

TK–8 schools designed with at least four cohorts per grade band and a total enrollment of 800 students provide continuity from early learning through middle grades. This scale supports teacher collaboration, inclusive special education services, and sustained enrichment programming. Schools can offer both foundational supports and middle-grade electives while maintaining stable staffing and scheduling. Strategically designed TK–8 schools strengthen enrollment retention, improve facility efficiency, and support long-term student success.

6–12 SCHOOLS

Schools serving grades 6 through 12 represent a distinctive design approach within Oakland Unified School District, originating with models such as Coliseum College Prep Academy (CCPA), Madison Park Academy, and Life Academy. These schools demonstrate how a continuous grade span can strengthen alignment between middle and high school experiences. **6–12 schools with 4 cohorts per grade** provide a continuous, vertically aligned experience that reduces transition risk and strengthens relationships with schools of 800–950 students. Students benefit from coordinated supports in the middle grades and expanded opportunities in high school, including Linked Learning pathways and dual enrollment. This structure supports inclusive special education and efficient use of facilities. Operationally, it stabilizes enrollment pipelines, reduces duplication, and improves overall program coherence.

COMPREHENSIVE HIGH SCHOOLS (GRADES 9–12)

High schools should be designed to accommodate at least 1,200–1,300 students to sustain comprehensive programming and operational stability. Ninth-grade cohort houses provide a structured transition into high school, improving on-track rates and long-term outcomes through coordinated supports and strong relationships. Within this structure, 10th–12th-grade Linked Learning pathways of 250–400 students create personalized learning communities with a strong focus on college, career, and community. This scale supports project-based learning, integrated CTE, work-based learning, personalized supports, dual enrollment, and inclusive instructional models. Sufficient cohort size

stabilizes staffing and scheduling, enabling effective counseling and pathway leadership while strengthening student engagement and postsecondary readiness.

CONTINUATION SCHOOLS (GRADES 10-12, OFF TRACK FOR GRADUATION)

Continuation high schools designed for students aged 16–18 are **most effective when designed for approximately 300 students**. At this scale, schools can offer multiple CTE sequences, increasing student choice and engagement rather than limiting students to a single option. Larger cohorts also support safer environments, adequate staffing, and consistent counseling structures. Very small programs dilute resources and limit overall impact, while this scale enables stronger programming and more strategic facility investments.

Summary

School size is not simply a facilities consideration. It is a foundational condition for instructional quality, student support, and long-term sustainability.

As the District considers both site-specific investments and broader, districtwide planning, it must prioritize opportunities that maximize value for student learning while also maximizing the impact of bond expenditures. This requires aligning school size, program design, and facility investment to support sustainable, high-quality educational models.

Designing the district for the future means making intentional choices about where and how to invest, ensuring that resources are concentrated in ways that strengthen instructional programs, expand student opportunities, and create stable, well-supported school communities.

5.7. Re-envisioning, Re-designing, & Transformative Decision Framework

OUSD uses consistent, transparent metrics to identify campuses that qualify for consideration as major investment projects. These metrics allow the District to focus limited capital resources on sites where investment can deliver the greatest system-wide benefit.

Criteria Used to Identify Transformative Project Candidates

CONTEXTUAL FACTORS FOR PRIORITIZATION

Beyond the initial data metrics used to identify transformative project candidates, OUSD must consider a broader set of contextual factors when determining which major investments should move forward and in what sequence. These considerations ensure that capital decisions are not only technically sound, but also equitable, strategic, and responsive to community needs.

Together, these factors allow the District to integrate both the technical and social dimensions of school planning into decision-making, ensuring that investments advance educational quality, equity, and long-term system sustainability.

Metric	Threshold	Indication
1. Campus Facility Condition Index (FCI)	Rating “Poor” or “Deficient”	Indicates buildings with substantial repair or replacement needs
2. Overall Education adequacy (EA) score	Less than rating “Good”	Reflects that existing spaces were not designed to support modern instructional models, including collaborative, flexible, and technology-integrated learning.
3. Current or potential enrollment capacity	Approaching grade-span standards: 500-650 (Elementary), 700-900 (Middle / 6–12/TK-8), 1,200 - 1,300 (High School)	Ensures investment is focused on schools capable of supporting comprehensive programs, operational efficiency, and long-term fiscal sustainability
4. Office of Public School Construction (OPSC) State Funding Eligibility	Eligible	Sites eligible for state matching funds provide opportunities to leverage local bond dollars, and accelerate delivery of major improvements.
5. Equity Indicators	Higher relative need	Includes unduplicated pupil count, students with disabilities, multilingual learners, and other indicators of student need to ensure alignment with equity priorities and resource allocation.
6. Enrollment Health Index	Moderate to strong	Combines birth rates, local capture rates, and historical and projected enrollment trends to assess long-term sustainability, community demand, and alignment between investment and realistic enrollment capacity.
7. Proximity to City-Owned or Publicly Controlled Properties	Within or adjacent	Proximity may enable shared use, joint development, or co-location of services (e.g., health, recreation, early childhood), strengthening community outcomes and maximizing public investment.

Figure 42 Criteria Used to Identify Transformative Project Candidates



ADDITIONAL FACTORS TO CONSIDER

Historic Designation and Architectural Significance

Buildings with historic protections or architectural value may require tailored modernization approaches rather than full replacement. These constraints should be incorporated early in feasibility analysis to identify appropriate investment strategies.

Proximity to Other Schools (within 0.5 miles)

High-density clusters of schools may benefit from combined solutions, shared infrastructure, or a single transformative project serving multiple communities. In these contexts, consolidation or co-location strategies may improve efficiency while expanding program offerings and community access.

Geographic Distribution of Bond Projects and Socioeconomic Conditions

The District should consider the geographic distribution of major investments to ensure that capital projects are equitably spread across communities and aligned with local socioeconomic conditions. Historically underserved neighborhoods may require prioritized investment to address compounding impacts of aging facilities, limited access to high-quality programs, and reduced community resources. Evaluating projects through this lens helps ensure that capital planning does not inadvertently reinforce inequities, but instead contributes to balanced investment and Districtwide fairness.

Historic Disinvestment and the Legacy of Redlining

In evaluating transformative projects, OUSD should explicitly consider the lasting impacts of historic disinvestment, redlining, and other discriminatory practices that shaped neighborhood development, attendance boundaries, and access to public resources. Many of the District's oldest and most under-resourced facilities are located in communities that experienced decades of systemic neglect. As new investments are made, the District should consider opportunities to create school boundaries that reflect socio-economic, cultural and racial diversity.

Coordination with the City of Oakland General Plan

Coordinating the Facilities Master Plan with the City of Oakland's General Plan allows OUSD to better anticipate where future enrollment demand may emerge based on

planned land use, housing development, and population growth. This alignment helps the District prioritize modernization or capacity investments in growth areas while avoiding overinvestment in locations where long-term enrollment is unlikely to rebound. Integrating citywide planning assumptions supports more efficient capital planning, improves student access to schools, and ensures the facilities portfolio reflects both current conditions and future development patterns.

These contextual factors ensure that transformative investments are evaluated not only through the lens of facility condition, but also through equity, access, community stability, and long-term District strategy, allowing OUSD to make decisions that are both responsible and forward-looking.

5.8. Determining New Construction vs. Major Modernization

Deciding whether a campus should receive a new building or a modernization requires careful analysis. OUSD should conduct feasibility studies, supported by architectural and engineering expertise, to assess:

- The cost difference between rebuilding and modernizing
- The remaining life and structural soundness of existing buildings
- The ability of the current campus layout to support modern instructional models
- Opportunities to improve safety, accessibility, and community use
- Phasing options that minimize disruption to students
- Community priorities and preferences

Regardless of the approach, any major investment must allow the school to deliver a high-quality, future-ready learning environment.

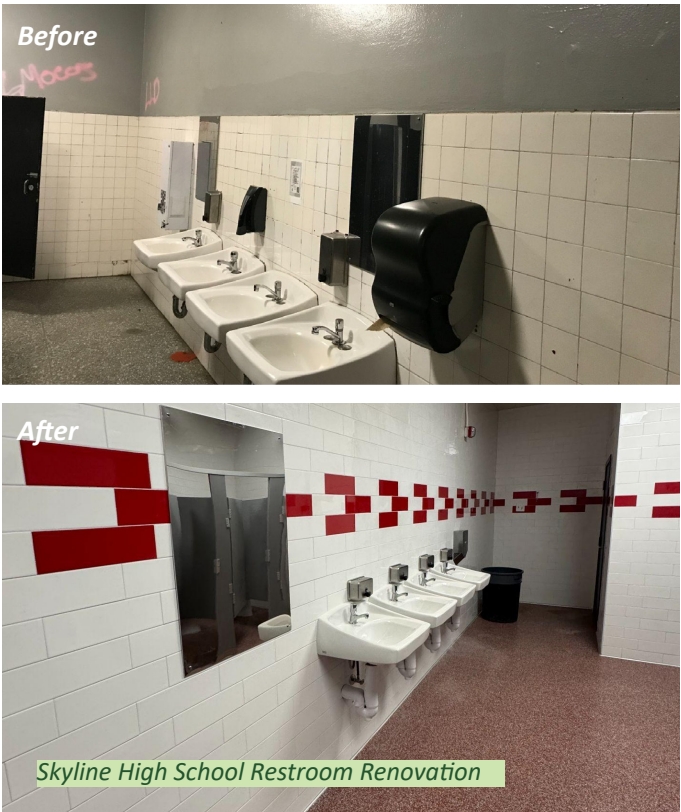
5.9. Districtwide Focused Projects Decision Framework

Unlike transformative projects, which are limited to a small number of campuses, Districtwide focused projects are designed to be implemented at many schools over time. It is important to emphasize that eligibility does not guarantee funding or implementation. The identification of need reflects technical analysis and professional judgment, but actual project selection will depend on available funding, project sequencing, community priorities, and Board direction.

Districtwide focused projects fall into two primary categories. While distinct, these categories often overlap and are best understood as complementary strategies.

Eligibility for Condition-Based Focused Projects

Condition-based projects respond to deficiencies identified through formal assessments and on-the-ground experience. These investments address the physical condition of buildings and systems that are critical to safe and effective school operations.



	Metric	Indication/ Details
Primary Eligibility Factors	Facility Condition Assessments	Buildings with rating Poor or Deficient Indicates repair or replacement needs
	Education adequacy assessments	Reflects that existing spaces were not designed to support modern instructional models, including collaborative, flexible, and technology-integrated learning.
Contextual Review	Data is interpreted in context such as equity and geographic indicators.	Through site walk-throughs, staff feedback, and maintenance records.
System-specific Qualification	Building system or space evaluations	Schools may qualify even if overall need rankings are lower when a specific system is failing or nearing the end of its useful life.

Figure 43 Eligibility Criteria Used to Identify Condition Based Focused Project Candidates



Eligibility for Program-Driven Focused Projects

Program-driven projects are designed to support District educational priorities and respond to evolving student needs. These investments focus on creating or improving spaces that enable specific programs and services, even when the overall facility condition may not warrant a major capital project.



	Metric	Indication/ Details
Primary Eligibility Factors	Enrollment Health and Trends	Combines birth rates, local capture rates, and historical and projected enrollment trends to assess long-term sustainability, community demand, and alignment between investment and realistic enrollment capacity.
	Program Participation and Demand Data	Program enrollment levels and demand indicators such as waitlists, application numbers, and participation rates for programs like CTE, TK, and specialized learning pathways.
	Program Vision, and District Strategic priorities	Reflects that existing spaces be designed to support suitable instructional models for the identified programs as per District priorities.
Program Alignment	Education adequacy assessments	Projects ensure facilities can support instructional models and services valued by families, regardless of a school’s age or overall condition

Figure 44 Eligibility Criteria Used to Identify Program-driven Focused Project Candidates

Implementation and Prioritization

As outlined in Section 5, Districtwide focused projects will be grouped into implementation tiers. These tiers reflect community feedback and District priorities and provide a clear framework for sequencing work over time.

Tiering allows the District to:

- Address the most urgent health and safety needs first
- Balance condition-based and program-driven investments
- Align capital work with funding availability
- Provide transparency and predictability to school communities

The exact projects included in each tier, as well as their scope and budgets, will be determined through future planning efforts. OUSD, the Board of Education, and the community will work together to refine project lists and adjust priorities as funding becomes available.

The goal is not to promote a purely data-driven approach but to support data-informed decisions that are thoughtful, contextual, and grounded in the lived experiences of students, families, and educators.

A Flexible and Equitable Investment Approach

Districtwide focused projects play a critical role in ensuring that capital investments benefit all students, not just those attending schools slated for major modernization or transformation. They provide flexibility, allowing the District to respond to emerging needs, address inequities, and make steady improvements across the system.

As facility conditions evolve, programs expand, and community priorities shift, the list of focused projects will continue to be updated. The Facilities Master Plan provides the tools needed to evaluate new data, revisit eligibility, and ensure that investment decisions remain responsive, transparent, and aligned with District goals.





5.10. Consistency with LCAP

The FMP is aligned with and supports the goals outlined in the Local Control and Accountability Plan (LCAP), ensuring that capital investments directly reinforce the District’s academic, equity, and student outcome priorities.

The FMP translates LCAP goals into a physical and spatial implementation framework, identifying how facilities can support key initiatives such as improved academic performance, equitable access to resources, student well-being, and community engagement.

LCAP 2025-26 Goals	Relevance and Consistency with FMP 2026
Goal 1 – Strong Academic Foundations Improve literacy, math, and college/career readiness for all students	Supports targeted investments in classrooms, labs, and CTE facilities, aligned with the FMP’s data-driven identification of academic gaps and prioritized through the T-shaped framework (districtwide upgrades + select transformative projects).
Goal 2 – Support for Priority Student Groups Improve outcomes for English learners, students with disabilities, foster youth, and other high-need groups	Reinforces the need for specialized, flexible, and inclusive learning environments, informed by equity-focused data analysis and prioritized through districtwide baseline improvements and targeted interventions at high-need campuses.
Goal 3 – Safe, Healthy, and Joyful Schools Ensure students feel safe, connected, and supported	Direct link to facilities upgrades, outdoor spaces, safety improvements, and “joyful schools” design with initiatives such as Living Schoolyards.
Goal 4 – Family and Community Engagement Strengthen partnerships with families and community	Aligns with the FMP’s approach to creating community-centered campuses, with investments in shared and multi-use spaces prioritized based on site context and community needs identified through engagement and data.
Goal 5 – Effective and Equitable Resource Allocation Ensure resources are aligned to student needs and equity priorities	Aligns with the FMP’s data-driven prioritization framework, ensuring investments are distributed based on facility condition, student need, and equity considerations across the district.
Goal 6 – Staff Recruitment, Retention, and Development Build a stable, diverse, and effective workforce	Supports improvements to staff work environments and amenities, aligned with FMP strategies that enhance campus functionality and contribute to attracting and retaining educators.
Goal 7 – Operational Effectiveness Improve district systems and service delivery	Aligns with facilities operations, maintenance systems, and asset management (FCI analysis integration)
Goal 8 – Continuous Improvement & Accountability Use data and stakeholder input to refine strategies	Positions the FMP as a living, data-informed framework that integrates ongoing community engagement, enabling continuous updates, performance tracking, and refinement of investment priorities over time.

Figure 45 Consistency Checklist with LCAP Goals