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

# Memo

**To** Board of Education

**From** Sondra Aguilera, Acting Superintendent  
Joshua R. Daniels, General Counsel  
Jenine A. Lindsey, Executive Director of Labor Relations & ADR

**Meeting Date** October 6, 2022

**Subject** “Sunshining” of the Oakland Unified School District’s Initial Proposals to All Bargaining Units regarding Health and Welfare Benefits Agreement

**Action** Conduct a Public Hearing on the District's initial proposal to all bargaining units regarding health and welfare benefits agreement

**Background & Discussion** In 2015, the District and all labor unions entered into an agreement through coordinated bargaining for a Health Benefits Governance Board (HBGB). The purpose of the HBGB is to:

- Establish shared ownership and responsibility among the Parties (both District and Labor) for the quality and continued viability of health and welfare benefits;
- Achieve stability, predictability, and equitability of health and welfare benefit programs;
- Maintain at least two affordable medical plans from which to choose;
- Provide the best health and welfare benefits possible at reasonable and affordable cost to the District and employee participants;
- Encourage and incentivize employee wellness and preventive health care as cornerstones of all District health and welfare plans, to the benefit of District employees, eligible dependents and in the interest of containing premium increases;
- Cover with health and welfare benefits all participating employees with minimum or no employee premium contributions;
- Provide for an annual increase in the District's contribution which shall be recognized by all parties as part of negotiated total compensation increases for District employees;
- Emphasize the critical role of the HBGB to contain costs within the annual budget for health and welfare benefits plus reserves funds, if any, through vendor participants, plan design and, if necessary, through direct contributions from participants;

- Incentivize the HBGB to enact, in a timely and preventive manner, meaningful changes to District plan designs and to take whatever measures are necessary to live within the health and welfare Fund as set-forth herein; and
- Explore options to reduce the cost of early retirees' (pre-Medicare) benefit costs.

Pursuant to Section 3547 of the Educational Employment Relations Act, before representatives of the District may begin formal negotiations on changing or extending an existing agreement, it is required to present its initial proposals for public review and comments. This process is often referred to as “sunshining.” As the District may propose to modify, amend, or replace certain sections of the HBGB Agreement, this public hearing is being conducted pursuant to Section 3547.

**Fiscal Impact**

To be determined based on the details of the successor agreement.

**Attachment(s)**

- Oakland Unified School District’s Initial Proposals to All Bargaining Units regarding Health and Welfare Benefits Agreement

OAKLAND UNIFIED SCHOOL DISTRICT INITIAL PROPOSALS  
TO ALL BARGAINING UNITS REGARDING HEALTH AND WELFARE BENEFITS AGREEMENT

Presented on October 6, 2022

The Oakland Unified School District (“OUSD”) submits this initial proposal to American Federation of State County and Municipal Employees (AFSCME) Local 257, Building Trades Council, Oakland Education Association (OEA), Service Employees International Union (SEIU) Local 1021, Teamsters Local 853, Teamsters Local 70, and United Administrators of Oakland Schools (UAOS). OUSD may propose to modify, amend, or replace the following sections of the HBGB Agreement, titled “Agreement Coordinated Bargaining Regarding Health and Welfare Benefits between the Oakland Unified School District and the Signatory Unions,” as follows:

**Section I: Establishment of the Health Benefits Governance Board**

**Section II: Health and Welfare Benefits Governance Board**

**Section III: Role and Operations of the Health Benefits Governance Board**

**Section IV: Calculation of Defined District Total Annual Contribution to the Health and Welfare Fund**

**Section V: Status of the Health and Welfare Fund and Shortfall Provisions**

**Section VI: Effect of Agreement**

**Section VII: Withdrawal from Plans**

**Section VIII: Definitions**