



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

SYSTEMS EQUITY REFORM: RESULTS-BASED BUDGETING TASK FORCE

Staff Lead: Sele Nadel-Hayes

Alignment with District Vision

OUSD MISSION/VISION

All students will graduate. As a result, they are caring, competent, and critical thinkers, fully-informed, engaged, and contributing citizens, and prepared to succeed in college and career.



OUSD GOAL

To create a FULL SERVICE COMMUNITY DISTRICT that serves the whole child, eliminates inequity, and provides each child with an excellent teacher every day.



TASK FORCE GOAL

To review, refine, and audit the finance system for schools (i.e. Results Based Budgeting) for effectiveness, efficiency, and equity, including the impact of RBB on high-needs schools.

Task Force (Sele Nadel-Hayes)

TASK FORCE GOALS

- **To review, refine, and audit the finance system for schools (i.e. Results-Based Budgeting) for effectiveness, efficiency, and equity.**
- **To analyze the recent history and impact of Results-Based Budgeting on high-needs schools**
- **To select a funding allocations model and process that supports all students and all schools to meet the district goals of academic and fiscal solvency**

TASK FORCE DELIVERABLES

- **Task force creates criteria for successful finance system for schools**
- **Task force reviews RBB and examines alternative model(s) and methods.**
- **Task force provides policy recommendation to Board of Education in December 2010**
- **Modified school allocations process in place by January 2011**

Task Force Membership

NAME	TITLE	ORGANIZATION	TASK FORCE ROLE
TBD	Large HS Principal/AP	OUSD	member
TBD	Small HS Principal/AP	OUSD	member
TBD	Large Elementary Principal/AP	OUSD	member
TBD	Small Elementary Principal/AP	OUSD	member
TBD	MS Principal/AP	OUSD	member
Artise Hardy	Budget Director	OUSD	member
TBD	Principal/AP – High Title I Eligible Percentage	OUSD	member
TBD	Principal/AP – Low Title I Eligible Percentage	OUSD	member
Vernon Hal	Dep Sup of Business and Operations	OUSD	member
TBD	RExO/NExO	OUSD	member
TBD	HRSS	OUSD	member
Lynn Bailiff	Operations Support Coach	OUSD	member
TBD	DAC member	OUSD	member
TBD	DAC member	OUSD	member
Sele Nadel-Hayes	Manager, Operations Support	OUSD	Staff Lead
TBD	Elementary Teacher	OUSD	member
TBD	MS Teacher	OUSD	member
TBD	HS Teacher	OUSD	member
Cecelia Shields	Financial Services Associate	OUSD	member

Operating Norms & Work Structure

OPERATING NORMS

- **Focus on solutions that promote effectiveness, efficiency, and equity.**
- **Promote transparency through shared documents and frequent engagement opportunities for all interested community members and district staff**

WORK STRUCTURE

- **Convene task force members for weekly study and engagement sessions**
 - **Evaluate current RBB system for effectiveness, efficiency, and equity**
 - **Review documentation and analysis of other equity-based budgeting systems**
 - **Collect criteria for selecting a successful system**
- **Facilitate weekly engagement sessions with other interested parties for feedback**
- **Produce two working documents**
 - **By November 5: Draft criteria for a successful system**
 - **By November 19: Draft policy for BOE and community review**
- **Produce a policy recommendation to the BOE**
- **Develop guidebook and training plan to be distributed and offered in January 2011**

Key Dates & Project Plan Overview

KEY DATES

- October 18th – Task Force Overview presentation to Finance/HR Committee
- October 27th – November 12th – Weekly study/engagement sessions
- November 5th – Draft criteria for successful system available for review and feedback
- November 19th – Draft policy recommendation available for review and feedback
- December 5th – Final policy recommendation review – Finance Committee (due to board office 11/24)
- December 12th – Final policy recommendation review/approval – BOE
- January 3rd – Budget development cycle begins for school sites and departments

	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
Establishment & Workplan										
Research/Analysis										
Feedback from community and Board members										
Budget office & schools implement policy recommendation										
Taskforce reviews impact & refines process										

Interdependencies with Other Task Forces

- Systems Equity Reform: Options & School Choice
 - Align funding allocations to support enrollment trends and planning
- Effective Principals & Leadership
 - Ensure training and other resources are in alignment with effective practices
 - Ensure site-based decision-making is reflected in budgeting cycle
- Balanced scorecard
 - Align results from funded programs with funding system
- Regional/Neighborhood Approach
 - Ensure that fiscal resources are allocated to schools in alignment with asset and resource management plans

Guiding Effective Practices & Research

Equity-Based Budgeting Research and Models

- Commission on Behavioral and Social Sciences and Education: [“Equity and Adequacy in Education Finance: Issues and Perspectives”](#) (1999) Chapters 7 and 8
- Hartford Unified School District [“Guide to Student-Based Budgeting”](#) (2008)
- Snell, Lisa [“Weighted Student Formula Yearbook: Best Practices”](#) Reason Foundation (2009)

OUSD-specific Results-Based Budgeting Research and Analysis

- Hill, Matt [“Funding Schools Equitably: Results-Based Budgeting in Oakland Unified School District”](#) Center for American Progress (2008)
- Chambers, Jay et al [“A Tale of Two Districts”](#) American Institutes for Research (2008)
- GO Public Schools [“RBB Issue Group Recommendations”](#) (2009)
- King, Caroline [“Results-Based Budgeting”](#) OUSD Knowledge Capture Project caselet (2009)