

Board Office Use: Legislative File Info.	
File ID Number	20-1368
Introduction Date	June 24, 2020
Enactment Number	20-1126
Enactment Date	June 24, 2020 er



LABOR MANAGEMENT & EMPLOYEE RELATIONS

MEMO

To: Board of Education

From: Kyla Johnson-Trammell, Superintendent
Joshua Daniels, General Counsel
Jenine Lindsey, Executive Director of Labor Strategy & ADR

Board Meeting Date: June 24, 2020

Subject: Tentative Agreement- Teamsters Locals 70 & 853

Action Requested and Recommendation Approval by the Board of Education of the tentative agreement (“TA”), as Agreement between the Oakland Unified School District (“OUSD”) and Teamsters Locals 70 & 853.

Background and Discussion The tentative agreement between OUSD and Teamsters, covering July 1, 2019 and June 30, 2022, includes a 5% on-going salary increase and bonuses. The tentative agreement was ratified by Teamsters Locals 70 & 853 unit members on April 23, 2020. Teamsters Locals 70 & 853 represents truck drivers and warehouse stock clerks.

Fiscal Impact The tentative agreement is within the District’s financial ability to cover the anticipated costs and reviewed by the Alameda County Office of Education (“ACOE”) through the AB1200 process. The purpose of ACOE’s review, as required by Government Code Sections 3540.2 and 3547.5, is to review and comment on the tentative agreements.

- Attachments**
- Tentative Agreement between OUSD and Teamsters Locals 70 & 853
 - ACOE’s AB 1200 Review Letter

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LABOR MANAGEMENT & EMPLOYEE RELATIONS

- Public Disclosure of Tentative Agreement

Tentative Agreement
Between
Teamsters and Oakland Unified School District

April 20, 2020
Time:

Article 5 Compensation

(1) Bonuses

Unit members employed by the District at the time of ratification/approval of this agreement by the Board of Education shall receive the following one-time bonuses:

- a. A one-time bonus equal to 3% of base annual salary (as of the date of Board ratification/approval).
- b. A one-time bonus equal to 3% of unit member base annual earnings between January 1, 2019 and June 1, 2020.

(2) Ongoing Salary Increase Effective 2019-20

Unit members employed by the District at the time of ratification by the Board shall receive a 5% on-going increase to all salary schedules effective June 1, 2020.

(3) Longevity Pay

Effective July 1, 2020, the longevity stipends for unit members shall be as follows:

- ~~1%~~ after 10 full years
- 2% after ~~15~~ **10** full years
- 3% after 20 full years

Article 7 Vacation

7.2.1 Vacation shall be scheduled so as to enable the District to maintain its full functioning status. Employees who prefer a specific vacation time period shall so notify their supervisors/department heads/administrators and such preferences shall be considered. Employees shall request vacation leave in writing or email to their supervisor with a cc/copy LMER Representative and the Union at least ten days in advance of an anticipated vacation leave, and shall then be given at least one week's notice of the date upon which their vacation period will commence. No more than three employees may be scheduled at the same time. No vacations will be scheduled during the two-week period immediately preceding the opening of the school in the fall.

Duration/ Term of the Agreement

This Agreement shall be effective July 1, 2019, except for those provisions which have been assigned other effective dates, and shall remain in full force and effect through June 30, 2021.

Reopeners

For the 2020-21 school year, the parties agree to a reopener on compensation plus up to two additional articles per party.

FOR TEAMSTERS

By: *Dominic Chiovare* 4/23/2020
Dominic Chiovare, President
Local 70

By: *[Signature]* 6/17/2020
Phillip Ybarrolaza, Business Agent Local 853

FOR THE DISTRICT

By: *Jenine A. Lindsey*
Jenine Lindsey, Executive Director, Labor Relations & ADR

By: *Kim Raney*
Kim Raney, Executive Director
Transportation and Logistics Nutrition
Services and Warehouse

Jody London

Jody London
President, Board of Education 6/25/2020

[Signature]

Kyla Johnson Trammell, Secretary
Board of Education 6/25/2020

**Memorandum of Agreement
Tentative Agreement
TEAMSTERS LOCAL 853/LOCAL 70 (“Teamsters”)
and
OAKLAND UNIFIED SCHOOL DISTRICT (“OUSD”)**

Regarding Vacation Accrual and Usage and COVID-19 School Closures

Vacation Accrual and Usage During COVID 19 Closure

- A. Within 45 days of the Board of Education’s approval of this Agreement, unit members who worked during the school closure period, or was unable to work due to medical (including occupational) illness, shall receive up to 80 hours of vacation hours accrued at the time of this agreement as a vacation payout.
- B. Unit members not reporting to work during the COVID-19 school closure, shall use vacation hours during the closure period (May 16, 2020 through May 30, 2020). If a unit member is ill, a unit member may use sick leave after all vacation hours are exhausted.

Premium Pay

- A. Unit members, performing essential duties, during the COVID-19 school closure shall be paid premium pay (an additional .5 their hourly rate for a total of time and a half) for hours worked May 16, 2020 through May 30, 2020 in support of food distribution to students.

Vacation Accrual and Payout for the 2020-21 and 2020-22 School Years

- A. For the 2020-21 and 2021-22 school year, each unit member shall take a minimum of 80 hours of vacation subject to the amount accrued by the employee and approval by the Department Lead.
- B. Employees with an excess of 120 hours, shall take mandatory vacation during winter break and spring break each fiscal year (3 full weeks).
- C. In ~~August~~ June of 2021 and ~~August~~ June 2022, each employee shall receive a vacation pay-out up to 80 vacation hours during the 2020-21 school year (not to exceed the amount accrued by the employee as of June 30, 2021 and June 30, 2022), provided that the employee took a minimum of 80 vacation hours during the school year.
- D. The district and the Union will strictly enforce OUSD policy and Article 7.2.1 of the CBA to ensure employees are enabled to schedule vacations.

Effective June 30, 2021 vacation accrual for unit members with a balance in excess of 300 hours, shall be suspended. **The unit member's vacation accrual shall be reactivated when such leave is below 300 effective the proceeding July 1st.** This provision will not apply if said employee was denied properly requested vacation by OUSD during the term of this MOU. This MOU will expire July 1st 2022 **unless an amendment and/or extension is agreed to by the party.**


FOR THE UNION

By:  4/23/2020
 Dominic Chiovare, President Local 70

By:  6/17/2020
 Phillip Ybarrolaza, Business Agent Local 853

FOR THE DISTRICT

By: 
 Jenine Lindsey, Director of Labor Strategy

By: 
 Kim Raney, Executive Director
 Transportation and Logistics Nutrition
 Services and Warehouse



Jody London
 President, Board of Education 6/25/2020



Kyla Johnson Trammell, Secretary
 Board of Education 6/25/2020



June 9, 2020

Jody London, President
Board of Education
Oakland Unified School District
1000 Broadway, Suite 680
Oakland, CA 94607

RE: Public Disclosure of Collective Bargaining Agreement with Teamsters Local 853/Local 70

Dear President London:

The Alameda County Office of Education (ACOE) received the completed Public Disclosure of Collective Bargaining Agreement (CBA) and signed Tentative Agreements between the Oakland Unified School District (OUSD) and Teamsters Local 853/Local 70 (Teamsters). The Public Disclosure includes increased compensation and other costs for the period July 1, 2019 through June 30, 2021, with reopeners in the 2020-21 school year. The purpose of ACOE's review, as required by Government Code (GC) Sections 3540.2 and 3547.5, is to review and comment on the tentative agreements.

Collective Bargaining Agreement Between Teamsters Local 853/Local 70

The Agreement between OUSD and Teamsters, covering period July 1, 2019 through June 30, 2021, provides for:

Bonuses

- 1) Unit members employed by the District at the time of ratification/approval of this agreement by the Board shall receive the following one-time bonuses:
 - a) A one-time bonus equal to 3% of base annual salary (as of the date of Board approval/ratification).
 - b) A one-time bonus equal to 3% of unit member base annual earnings between January 1, 2019 and June 1, 2020.

Ongoing Salary Increase Effective 2019-20

Unit members employed by the District at the time of ratification by the Board shall receive a 5% on-going increase to all salary schedules effective June 1, 2020.

Longevity Pay

Effective July 1, 2020, the longevity stipends for unit members shall be as follows:

- a) 2% after 10 full years
- b) 3% after 20 full years

Fiscal Impact of the Tentative Agreements with Teamsters

Per the District's Public Disclosure of Collective Bargaining Agreement, the District estimates the fiscal impact to the General Fund as follows:

Description	2019-20	2020-21	2021-22
One-Time Fiscal Impact:	\$16,139	\$0	\$0
Ongoing Fiscal Impact:	\$20,098	\$22,268	\$22,302
Total Fiscal Impact	\$36,237	\$22,268	\$22,302

Pursuant to Assembly Bill (AB) 2756 and GC Section 3547.5(c) the county superintendent is granted the authority to take specific action if a school district does not process the budget revisions necessary to meet the costs of the agreement in each year of its term.

Structural Deficit Spending and Reserves

The District's public disclosure document is projecting structural operating deficits in its general fund of \$9.3 million for fiscal year 2019-20, \$35.1 million for fiscal year 2020-21 and \$71.7 million for fiscal year 2021-22. The District's financial analysis, as presented in the disclosure, projects the District is unable to meet the 2% percent minimum reserve requirement level, as set by the state criteria and standards for two (2) of the three (3) years.

Based on ACOE's preliminary review of OUSD's Third Interim Budget Report, the District is projecting a structural operating deficit in its 2019-20 Third Interim Budget Report and related multi-year budget projection for the two (2) subsequent years. The District calculated that an on-going \$36.7 million and an additional \$39.8 million in expenditure reductions and/or revenue enhancements are needed for 2020-21 and 2021-22, respectively, in order to maintain the board-approved reserve standards.

In early May 2020, the Governor announced the revised State budget projection for 2020-21, which included a 10% reduction (Proration Factor) that is applied to the LCFF base grant, after applying 2.31% COLA, which will effectively reduce OUSD's LCFF entitlement by 7.92%. The Proration Factor is triggered off, if backfill funding from the federal government is received by the state of California. These reductions to the District's general funding levels further exacerbates the deficit spending of OUSD and would require additional budget balancing solutions to maintain its reserve level.

OUSD's Commitment to Fiscal Solvency

The Governing Board of OUSD (Board) has the fiduciary responsibility to maintain fiscal solvency for the current and subsequent fiscal years. On June 26, 2019, the Board has approved Resolution No.1819-0219 confirming OUSD's commitment to identify a plan for expenditure reductions and/or revenue enhancements of \$10 million for the 2020-21 school year, beginning in October of 2019, with finalization no later than March 2020, with an additional \$10.5 million in expenditure reductions and/or revenue enhancements for 2021-22 to be finalized no later than March 2021.

This resolution has been superseded by Resolution No. 1920-0180 on December 11, 2019 and directed the Superintendent to identify sufficient reductions in general fund expenditures and/or increases in general fund revenues for 2020-21 to ensure that the District can maintain its 3% reserve for 2021.

On March 4, 2020, the Board approved Resolution No. 1920-0214, which committed to implement expenditure reductions and other budget balancing solutions of \$20.2 million for 2020-21 and reaffirmed its commitment to establish 1% reserve above the 2% reserve required by the State at the closing of books for 2019-20. OUSD staff is currently working to implement these Board approved reductions.

Conclusion

We commend the Board and the OUSD District staff with its board approved strategic plan of action. However, we caution the District that the affordability of the tentative agreements with Teamsters is highly dependent and contingent upon the full implementation of Resolution No. 1920-0214, and the District outlining and approving additional budget balancing solutions to retain fiscal stability.

The OUSD Board may consider deferring the approval/ratification of this recent settlement until after ACOE's review of the District's 2020-21 Adopted Budget report and multi-year budget projection, that may result in budget savings for 2019-20, and will more accurately reflect the true impact of this settlement, the finalized estimates of California's Prop. 98 funding levels, as well as allows OUSD to implement its strategic plan as approved in March.

We appreciate the assistance and cooperation of the District's business office during our review process. If you have any questions, please feel free to call me at (510) 670-4140.

Sincerely,



L. Karen Monroe
Alameda County Superintendent of Schools

cc: Board of Education, Oakland USD
Kyla Johnson-Trammell, Superintendent, Oakland USD
Preston Thomas, Chief Systems and Operations Officer, Oakland USD
Lisa Grant-Dawson, Chief Business Officer, Oakland USD
Luz T. Cazares, Interim Chief Financial Officer (Consultant), Oakland USD
Gina Murphy-Garrett, Senior Executive Director, Budget
Chris Learned, State Trustee, Oakland USD
Tony Thurmond, State Superintendent of Public Instruction, CDE
Raul A. Parungao, Associate Superintendent of Business Services, ACOE
Teresa Santamaria, Chief of District Business & Advisory Services, ACOE
Shirene Moreira, Director II, District Advisory Services, ACOE

Public Disclosure of Collective Bargaining Agreement

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of District: Oakland Unified School District

Name of Bargaining Unit: Teamsters Locals 70 & 853

Certificated or Classified: Classified - Fund 01

The proposed agreement covers the period beginning: 7/1/2019 and ending: 7/1/2022
(date) (date)

The Governing Board will take action on: 6/24/2020
(date)

Letter requested from Alameda County Office of Education? Yes (indicate yes or no)

A. Proposed Changes in Compensation

Bargaining Unit Compensation Changes to General Fund as a result of Collective Bargaining Agreement	Annual Cost Prior to Proposed Agreement FY 2019-20	Fiscal Impact of Proposed Agreement <small>(complete Year 2 and 3 for multiyear & overlapping agreements only)</small>		
		Year 1	Year 2	Year 3
		Increase/(Decrease) FY 2019-20	Increase/(Decrease) FY 2020-21	Increase/(Decrease) FY 2021-22
1. Salary Schedule (Including Step & Column)	\$ 296,185	\$ 14,954	\$ 16,568	\$ 16,594
		5.05%	5.59%	5.60%
2. Other Compensation Stipends, Bonuses, Longevity, Overtime Differential, Callback or Standby Pay, etc.		\$ 14,195		
		4.79%	0.00%	0.00%
2a. Description of Other Compensation (Listed on Line 2 above)				
3. Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.	\$ 101,888	\$ 7,089	\$ 5,700	\$ 5,708
		6.96%	5.59%	5.60%
4. Health/Welfare Increases				
		0.00%	0.00%	0.00%
5. Total Cost of Negotiated Settlement (Add Items 1 through 4 to equal 5)	\$ 398,073	\$ 36,237	\$ 22,268	\$ 22,302
		9.10%	5.59%	5.60%
6. Total number of represented Employees (Use FTEs)	7.3	7.3	7.3	7.3
7. Total Compensation <u>Average</u> Cost per Employee	\$ 54,531	\$ 4,964	\$ 3,050	\$ 3,055
		9.10%	5.59%	5.60%

Public Disclosure of Collective Bargaining Agreement
 In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of District: **Oakland Unified School District**

Name of Bargaining Unit: **Teamsters Local 70 & 853**

The Governing Board will take action on: **6/24/2020**

D. Impact of Proposed Agreement on Current Year Operating Budget - UNRESTRICTED GENERAL FUND

Impact of the Proposed Agreement on the Current Year Operating Budget (EC 42142)	Column 1	Column 2	Column 3	Column 4
	Latest Board-Approved Budget Before Settlement As of: 4/30/2020	Adjustments as a result of Settlement	Other Revisions due to Settlement and/or Other Unit Agreements	Total New Budget (Col 1+2+3)
Revenues				
LCFF Sources (8010-8099)	\$ 381,973,989			\$ 381,973,989
Federal Revenue (8100-8299)	\$ -			\$ -
Other State Revenue (8300-8599)	\$ 10,284,537			\$ 10,284,537
Other Local Revenue (8600-8799)	\$ 7,128,985			\$ 7,128,985
Total Revenues	\$ 399,387,511	\$ -	\$ -	\$ 399,387,511
Expenditures				
Certificated Salaries (1000-1999)	\$ 140,141,581			\$ 140,141,581
Classified Salaries (2000-2999)	\$ 53,729,970	\$ 29,148		\$ 53,759,119
Employee Benefits (3000-3999)	\$ 90,316,862	\$ 7,089		\$ 90,323,951
Books and Supplies (4000-4999)	\$ 10,448,219			\$ 10,448,219
Services & Operating Expenses (5000-5999)	\$ 38,249,405			\$ 38,249,405
Capital Outlay (6000-6599)	\$ 214,089			\$ 214,089
Other Outgo (7100-7299 & 7400-7499)	\$ 5,985,437			\$ 5,985,437
Direct Support/Indirect Cost (7300-7399)	\$ (3,081,507)			\$ (3,081,507)
Total Expenditures	\$ 336,004,056	\$ 36,237	\$ -	\$ 336,040,294
Operating Surplus (Deficit)	\$ 63,383,454			\$ 63,347,217
Other Sources and Transfers In (8910-8979)	\$ 264,067			\$ 264,067
Other Uses and Transfers Out (7610-7699)	\$ -			\$ -
Contributions (8980-8999)	\$ (71,215,526)			\$ (71,215,526)
Current Year Increase (Decrease) In Fund Balance	\$ (7,568,004)	\$ -	\$ -	\$ (7,604,242)
Beginning Balance	\$ 34,047,095			\$ 34,047,095
Pr. Year Audit Adj./Restatements (9793-9795)				
Current Year Ending Balance	\$ 26,479,090	\$ -	\$ -	\$ 26,442,853
Components of Ending Balance				
Reserved and Legally Restricted (9711-9740)				\$ -
Reserved for Economic Uncertainties (9789)	\$ 11,995,481	\$ 725	\$ -	\$ 11,996,206
Designated Amounts (9775-9780)				\$ -
Unappropriated Amounts (9790)	\$ 14,483,609			\$ 14,446,647

Public Disclosure of Collective Bargaining Agreement
 In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of District: **Oakland Unified School District**

Name of Bargaining Unit: **Teamsters Local 70 & 853**

The Governing Board will take action on: **6/24/2020**

D. Impact of Proposed Agreement on Current Year Operating Budget - RESTRICTED GENERAL FUND

Impact of the Proposed Agreement on the Current Year Operating Budget (EC 42142)	Column 1 Latest Board- Approved Budget Before Settlement As of: 4/30/2020	Column 2 Cost of of Settlement	Column 3 Other Revisions due to Settlement	Column 4 Total New Budget (Col 1+2+3)
Revenues				
LCFF Sources (8010-8099)	\$ 3,233,105			\$ 3,233,105
Federal Revenue (8100-8299)	\$ 54,283,478			\$ 54,283,478
Other State Revenue (8300-8599)	\$ 61,118,420			\$ 61,118,420
Other Local Revenue (8600-8799)	\$ 72,199,928			\$ 72,199,928
Total Revenues	\$ 190,834,932	\$ -	\$ -	\$ 190,834,932
Expenditures				
Certificated Salaries (1000-1999)	\$ 70,282,531			\$ 70,282,531
Classified Salaries (2000-2999)	\$ 41,128,344			\$ 41,128,344
Employee Benefits (3000-3999)	\$ 72,432,792			\$ 72,432,792
Books and Supplies (4000-4999)	\$ 9,664,407			\$ 9,664,407
Services & Operating Expenses (5000-5999)	\$ 60,021,735			\$ 60,021,735
Capital Outlay (6000-6599)	\$ 893,676			\$ 893,676
Other Outgo (7100-7299 & 7400-7499)	\$ 6,457,426			\$ 6,457,426
Direct Support/Indirect Cost (7300-7399)	\$ 2,003,032			\$ 2,003,032
Total Expenditures	\$ 262,883,943	\$ -	\$ -	\$ 262,883,943
Operating Surplus (Deficit)	\$ (72,049,011)	\$ -	\$ -	\$ (72,049,011)
Other Sources and Transfers In (8910-8979)				\$ -
Other Uses and Transfers Out (7610-7699)	\$ 886,044			\$ 886,044
Contributions (8980-8999)	\$ 71,215,526			\$ 71,215,526
Current Year Increase (Decrease) In Fund Balance	\$ (1,719,529)	\$ -	\$ -	\$ (1,719,529)
Beginning Balance	40,683,995			\$ 40,683,995
Pr. Year Audit Adj./Restatements (9793-9795)				
Current Year Ending Balance	\$ 38,964,466	\$ -	\$ -	\$ 38,964,466
Components of Ending Balance				
Reserved and Legally Restricted (9711-9740)	\$ 38,964,466			\$ 38,964,466
Reserved for Economic Uncertainties (9789)				
Designated Amounts (9775-9780)				\$ -
Unappropriated Amounts (9790)	\$ -			\$ -

Public Disclosure of Collective Bargaining Agreement
 In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of District: **Oakland Unified School District**

Name of Bargaining Unit: **Teamsters Local 70 & 853**

The Governing Board will take action on: **6/24/2020**

D. Impact of Proposed Agreement on Current Year Operating Budget - COMBINED GENERAL FUND

Impact of the Proposed Agreement on the Current Year Operating Budget (EC 42142)	Column 1 Latest Board- Approved Budget Before Settlement As of: 4/30/2020	Column 2 Cost of of Settlement	Column 3 Other Revisions due to Settlement	Column 4 Total New Budget (Col 1+2+3)
Revenues				
LCFF Sources (8010-8099)	\$ 385,207,094	\$ -	\$ -	\$ 385,207,094
Federal Revenue (8100-8299)	\$ 54,283,478	\$ -	\$ -	\$ 54,283,478
Other State Revenue (8300-8599)	\$ 71,402,957	\$ -	\$ -	\$ 71,402,957
Other Local Revenue (8600-8799)	\$ 79,328,913	\$ -	\$ -	\$ 79,328,913
Total Revenues	\$ 590,222,443	\$ -	\$ -	\$ 590,222,443
Expenditures				
Certificated Salaries (1000-1999)	\$ 210,424,111	\$ -	\$ -	\$ 210,424,111
Classified Salaries (2000-2999)	\$ 94,858,314	\$ 29,148	\$ -	\$ 94,887,463
Employee Benefits (3000-3999)	\$ 162,749,655	\$ 7,089	\$ -	\$ 162,756,744
Books and Supplies (4000-4999)	\$ 20,112,626	\$ -	\$ -	\$ 20,112,626
Services & Operating Expenses (5000-5999)	\$ 98,271,139	\$ -	\$ -	\$ 98,271,139
Capital Outlay (6000-6599)	\$ 1,107,765	\$ -	\$ -	\$ 1,107,765
Other Outgo (7100-7299 & 7400-7499)	\$ 12,442,863	\$ -	\$ -	\$ 12,442,863
Direct Support/Indirect Cost (7300-7399)	\$ (1,078,475)	\$ -	\$ -	\$ (1,078,475)
Total Expenditures	\$ 598,887,999	\$ 36,237	\$ -	\$ 598,924,236
Operating Surplus (Deficit)	\$ (8,665,557)	\$ (36,237)	\$ -	\$ (8,701,794)
Other Sources and Transfers In (8910-8979)	\$ 264,067	\$ -	\$ -	\$ 264,067
Other Uses and Transfers Out (7610-7699)	\$ 886,044	\$ -	\$ -	\$ 886,044
Contributions (8980-8999)	\$ -	\$ -	\$ -	\$ -
Current Year Increase (Decrease) In Fund Balance	\$ (9,287,534)	\$ (36,237)	\$ -	\$ (9,323,771)
Beginning Balance	\$ 74,731,090			\$ 74,731,090
Pr. Year Audit Adj./Restatements (9793-9795)	\$ -			\$ -
Current Year Ending Balance	\$ 65,443,556	\$ (36,237)	\$ -	\$ 65,407,319
Components of Ending Balance				
Reserved and Legally Restricted (9711-9740)	\$ 38,964,466	\$ -	\$ -	\$ 38,964,466
Reserved for Economic Uncertainties (9789)	\$ 11,995,481	\$ 725	\$ -	\$ 11,996,206
Designated Amounts (9775-9780)	\$ -	\$ -	\$ -	\$ -
Unappropriated Amounts - Unrestricted (9790)	\$ 14,483,609	\$ -	\$ -	\$ 14,483,609
Unappropriated Amounts - Restricted (9790)	\$ -	\$ -	\$ -	\$ -
Unrestricted Reserves Percentage	4.41%			4.41%

Public Disclosure of Collective Bargaining Agreement

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of District: Oakland Unified School District

Name of Bargaining Unit: Teamster

The Governing Board will take action on: 6/24/2020

E. Revised MYP Including the Effects of Collective Bargaining

	Year 1	Year 2	Year 3
	FY 2019-20	FY 2020-21	FY 2021-22
Revenues			
LCFF Revenue Sources	385,207,094	353,979,094	351,951,552
Federal Revenue	54,283,478	61,349,741	46,849,741
Other State Revenue	71,402,957	64,701,534	64,701,534
Local Revenue	79,328,913	79,328,913	79,328,913
Other Financing Sources	264,067	264,067	264,067
Total Revenue	590,486,510	559,623,349	543,095,807
Expenditures			
Certificated Salaries	210,424,111	210,424,111	212,401,696
Step & Column Adjustment		2,735,514	2,761,223
Settlement-Related Costs (+/-)			
Other Adjustments		(757,929)	8,500,000
Total Certificated Salaries	210,424,111	212,401,696	223,662,919
Classified Salaries	94,887,463	94,887,463	95,468,130
Step & Column Adjustment		1,233,158	1,240,491
Settlement-Related Costs (+/-)		16,568	16,594
Other Adjustments		(669,059)	(366,860)
Total Classified Salaries	94,887,463	95,468,130	96,358,355
Employee Benefits	162,756,744	165,578,337	171,596,808
Settlement-Related Costs (+/-)		5,700	5,708
Books & Supplies	20,112,626	14,659,960	14,913,577
Services, Other Operating Exp	98,271,139	93,307,500	94,921,720
Capital Outlay	1,107,765	1,107,765	1,107,765
Other Outgo (Excluding Transfers of Indirect Costs)	12,442,863	12,442,863	12,442,863
Other Outgo - Transfers of Indirect Costs	(1,078,475)	(1,078,475)	(1,078,475)
Other Financing Uses	886,044	886,044	886,044
Other Adjustments			
Total Expenditures	599,810,280	594,779,520	614,817,284
Net Increase(Decrease) in Fund Balance	(9,323,771)	(35,156,171)	(71,721,477)
Beginning Fund Balance	74,731,090	65,407,319	30,251,148
Audit Adjustments/Restatements	0		
Ending Balance	65,407,319	30,251,148	(41,470,330)
Components of Ending Balance			
Revolving & Stores	150,000	150,000	150,000
Restricted Balance & Other Designations	38,964,466	39,525,039	36,030,609
Required Reserve	11,996,206	16,441,843	18,442,478
Unrestricted Balance (Incl Revolving)	14,296,647	(25,865,735)	(96,093,417)
ADA Assumption:	33,897	33,717	33,517
Comments (Major changes):			

Public Disclosure of Collective Bargaining Agreement
 In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

F. State Reserve Standard

1. Calculate State Required Minimum Reserve - Required Reserve for Economic Uncertainty (REU)

	Year 1	Year 2	Year 3
a. Total Expenditures including Transfers Out and Other Uses	599,810,280	594,779,520	614,817,284
b. Required Reserve Percentage (REU) for this District	2.00%	2.00%	2.00%
c. REU Amount:	\$ 11,996,206	\$ 11,895,590	\$ 12,296,346

2. Budgeted Unrestricted Reserve (After Impact of Proposed Agreement)

a. General Fund Unrestricted REU	\$ 11,996,206	\$ 16,441,843	\$ 18,442,478
b. General Fund Unrestricted Unassigned/Unappropriated	\$ 14,296,647	\$ (25,865,735)	\$ (96,093,417)
c. Special Reserve Fund 17- REU	\$ -	\$ -	\$ -
d. Special Reserve Fund 17- Unassigned/Unappropriated	\$ -	\$ -	\$ -
g. Total District Budgeted Unrestricted Reserves	\$ 26,292,853	\$ (9,423,892)	\$ (77,650,939)

3. Has the minimum state-required reserve been met? **Yes** **No** **No**

If NO, how do you plan to restore your reserves?

By making additional reductions due to the District's projected losses as a result of the Governor's May Revise for FY 20-21 and FY 21-22.

Public Disclosure of Collective Bargaining Agreement

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of District: Oakland Unified School District

Name of Bargaining Unit: Teamster

The Governing Board will take action on: 6/24/2020

B. Narrative Description of Agreement

8. **What was the negotiated percentage increase that was approved?** For example, if the increase in "Year 1" was for less than a full year, what is the annualized percentage of that increase for "Year 1"?

3.00% of base salary as of date of Board ratification. 3.00% of base salary earned between Jan 01, 2019 through Jun 30, 2020. 5.00% salary increase, June 01, 2020

9. **Were any additional steps, columns or ranges added to the schedules?**

(If yes, please explain.)

No additional steps or columns.

10. **Please include additional comments and explanations as necessary.**

(If more room is necessary, please attach additional sheet.)

N/A

11. **Proposed negotiated changes in non-compensation items**

(e.g. class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

N/A

12. **What contingency language is included in the proposed agreement (e.g. reopeners, etc.)?**

N/A

13. **Identify other major provisions that do not directly affect the district's costs; such as binding arbitration, grievances procedures, etc.**

New language to enforce use of vacation time to mitigate the cost of vacation payouts and cultivate employee wellness.

Oakland Unified School District School District
Public Disclosure of Collective Bargaining Agreement
In accordance with AB1200 (Chapter 1213/1991) and GC 3547.5.

Certification of Board Action

The disclosure document must be signed by the district Superintendent or designee at the time of public disclosure and by the President or Clerk of the Governing Board at the time of formal board action on the proposed agreement.

The information provided in this document summarizes the financial implications of the proposed agreement and is submitted to the Governing Board for public disclosure of the major provisions of the agreement (as provided in the "Public Disclosure of Proposed Collective Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code 3547.5.

<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/> District Superintendent (or Designee) (Signature)	<div style="background-color: yellow; height: 20px; width: 100%;"></div> <hr style="border: none; border-top: 1px solid black; margin-top: 5px;"/> Date
---	--

After public disclosure of the major provisions contained in this summary, the Governing Board, at its meeting on 6/24/2020 , took action to approve the proposed Agreement with the Teamster Bargaining Unit.

<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/> President (or Clerk), Governing Board (Signature)	<div style="background-color: yellow; height: 20px; width: 100%;"></div> <hr style="border: none; border-top: 1px solid black; margin-top: 5px;"/> Date
---	--

Special Note: The Alameda County Office of Education reserves the right to ask any additional questions or request any additional information we feel is necessary to review the district properly under AB 1200, including a copy of the Tentative Agreement.

Public Disclosure of Collective Bargaining Agreement
 In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of District: **Oakland Unified School District**

Name of Bargaining Unit: **Teamster**

The Governing Board will take action on: **6/24/2020**

C. Source of Funding for Proposed Agreement

14. Source of Funding for Proposed Agreement

A. If this is a one-time or off-schedule settlement, how will the cost of the proposed agreement be funded and when is the payment expected to be funded?

[Redacted]

B. If this is not a one-time settlement, how will the ongoing cost of the proposed agreement be funded in the current and subsequent years (i.e., what will allow the district to afford this contract on an ongoing basis)?

[Redacted]

15. What are the Specific Impacts (Positive or Negative) on Instructional and Support Programs to Accommodate the Settlement? Include the impact of changes such as staff reductions or increases, program reductions or increases, elimination or expansion of other services or programs (e.g. counselors, librarians, custodial staff, etc.).

[Redacted]

16. Will this agreement create, increase, or decrease deficit spending in the current or subsequent year(s)? "Deficit spending" is when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

[Redacted]

17. Were "Other Adjustments" amount(s) entered in the multiyear projections (page 5) for 1st and 2nd subsequent fiscal years?

<u>MYP</u>	<u>Amount</u>	<u>"Other Adjustments" Explanation</u>
1st Subsequent Year	\$ (1,426,988)	Negotiated salary agreements and Board
2nd Subsequent Year	\$ 8,133,140	Negotiated salary agreements and Board

Additional Explanation (if necessary)

[Redacted]

Oakland Unified School District **School District**
Public Disclosure of Collective Bargaining Agreement

In accordance with AB1200 (Chapter 1213/1991) and GC 3547.5.

CERTIFICATE OF AFFORDABILITY

Certification of the District’s Ability to Afford the Costs of a Collective Bargaining Agreement

This disclosure document must be signed by the District Superintendent and Chief Business Official prior to public disclosure and included as part of the public disclosure documentation.

The District projects the total monetary cost of the settlement to be as follows:

For an ongoing cost, please show the ongoing cost in each year. For a one-time cost, only include the cost in the year impacted.

Cost over current budget / MYP	Year 1	Year 2	Year 3	Cumulative cost over 3 years
One-time	16,139	-	-	16,139
On-going	20,098	22,268	22,302	64,668
Total	36,237	22,268	22,302	80,807

Please check one of the following:

No budget revisions are necessary for the District to afford this settlement.

Budget revisions are necessary for the District to afford this settlement. These revisions are itemized below. The District’s budget assumptions are attached, which become an integral part of this document.

Note that if the District does not adopt all of the revisions in the current fiscal year, the County Superintendent is required to issue a qualified or negative certification on the next Interim Report per Government Code (GC) 3547.5(c).

Indicate any changes from the latest board approved budget:

Budget Adjustment Categories	Change to Fund Balance Increase (Decrease)		
	Year 1	Year 2	Year 3
Revenues/Other Financing Sources			
Expenditures/Other Financing Uses			
Increased salary costs	36,237	22,268	22,302
0	(36,237)	(22,268)	(22,302)
Ending Fund Balance Increase (Decrease)	-	-	-

Please review the above and sign below:

In accordance with the requirements of Government Code Section 3547.5, the Superintendent and Chief Business Official of the Oakland Unified School District School District hereby certify that the District can meet the costs incurred under the Collective Bargaining



District Superintendent (Signature)

6/17/2020

Date

Kyla Johnson-Trammell

District Superintendent (Type Name)


Lisa Grant Dawson (Jun 19, 2020 08:58 PDT)

Chief Business Official (Signature)

6/17/2020

Date

Lisa Grant-Dawson

Chief Business Official (Type Name)









1 Teamsters ACOE AB1200 v2020-0602

Final Audit Report

2020-06-19

Created:	2020-06-18
By:	Ronald Morrisjr (ronald.morrisjr@ousd.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAAU_aTqOifcvaxYFYQLcDrdcYRh5U_54T9

"1 Teamsters ACOE AB1200 v2020-0602" History

-  Document created by Ronald Morrisjr (ronald.morrisjr@ousd.org)
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