

Oakland Unified School District's 2017-18 Budget Development Guide for School Sites



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I. MESSAGE FROM OUR INTERIM SUPERINTENDENT

Dear District Leaders,

I am pleased to share this year's 2017-18 OUSD Budget Guide Handbook (Handbook) with you. Each year, we aim to create a tool that can help ease anxiety that often surrounds budget season. This year, the Handbook includes answers to frequently asked questions and valuable tips and information from Central Office partners who have contributed their knowledge and expertise to make the budgeting process more user friendly for schools.

The 2017-18 Budget Development Kick Off for schools is scheduled to begin **February 10, 2017**. This process provides the opportunity for engagement with stakeholders and the ability to incorporate feedback into the schools' budget model. This is an extremely important step whenever possible or required by funding guidelines, such as Title I. This Handbook will guide you through several major funding sources clarifying how to utilize the resources for staffing purposes to:

- Meet the instructional needs of students;
- Articulate programs guidelines with School Site Councils; and
- Comply with Local Control Accountability Plan (LCAP) requirements, Board of Education actions, and schools' priorities.

What's New? This year, the Handbook includes an important new feature allowing us to more easily comply with LCAP coding according to Alameda County of Education and State Department of Education budget guidelines. This budgeting cycle you will be able to allocate funds using LCAP Goals and Action Areas. This budgeting feature has been made possible thanks to a major project lead by several of the Financial Services' departments.

What's Next? Please plan to begin working with your Network Superintendent, School Site Council (SSC) and the Office of Accountability and Programs to build and complete budget worksheets prior to attending budgetary consultations with Budget Analysts. The Budget Office Team looks forward to supporting you and working with you throughout the budget development process.

It is extremely important to engage with your SSC regarding your site's entire budget and reflect community input in your final plans. Together, with stakeholder feedback and data-informed decision making we will achieve the strongest and most impactful OUSD budget. I look forward to working with you all to ensure a successful budget development process. Thank you all for your dedication every day and your commitment to excellence as we ensure *Every Student Thrives!*

In Partnership,



Devin Dillon, PhD
Interim Superintendent

The Budget Development Handbook is designed to inform school site leaders on the technical aspects and overall process of Budget Development for 2017-18. Upon a review of this handbook, a school site leader will understand the rules, expectations, flexibilities and timing of the full Budget Development process.

Please note supporting materials concerning the academic program guidance will be forthcoming from the Chief of Schools and Network Superintendents.

II. REACHING OUR DISTRICT GOALS WITH SITE-BASED BUDGETS

To ensure that every Oakland public school student is prepared for success in college, career, and community, we must use all the resources at our disposal and allocate them in a manner that reflects our shared beliefs and supports a common vision for Oakland students. Funding from the State of California comprises the largest financial resource for the District. The Local Control Funding Formula (LCFF) is the mechanism that determines how the State funds education. Funds are allocated based on our enrollment, with additional allocation of funds based on our enrollment of English Learner, Low-Income, and Foster Youth.

LCFF funding requires that each school district develop a Local Control Accountability Plan (LCAP). The LCAP is a three year accountability plan that requires input from stakeholders to ensure LCFF funds are spent intentionally and strategically for our targeted populations: Students with Economic Hardship, English Language Learners, Foster Youth, Disabilities, African-American Students, and Latino Students. The six major goals of the LCAP, and the indicators that will measure our progress towards those goals are provided in the Appendix. Also provided are the actions that the District has committed to take, through budget allocations, to achieve those goals.

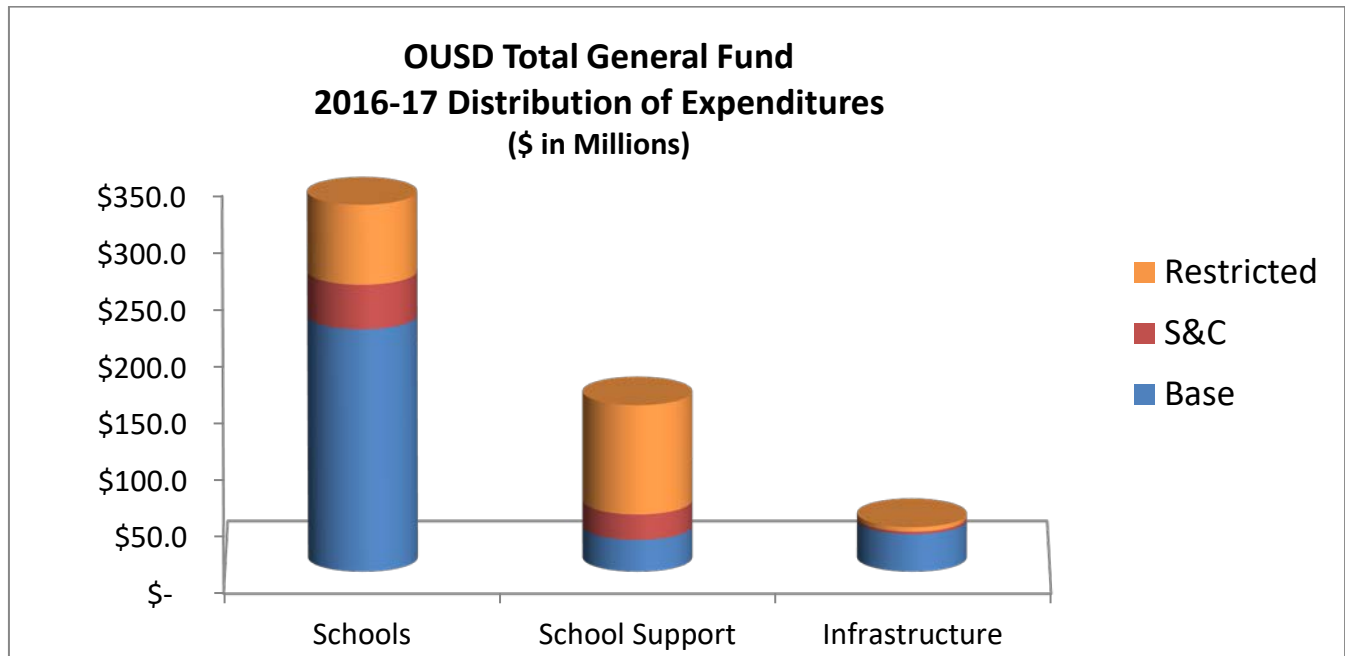
The process of community engagement is ongoing, through the LCAP Parent, English Language Learner, and Student advisory committees. Each school site should be reaching out to its own community for direction and agreement on school site plans.

The budget process translates the principles and priorities of the Strategic Plan and the LCAP into people, programs and investments that will move us as a District towards the outcomes we've targeted.

The Board of Education established the following principles (articulated in Board Policy 3150) to guide the Oakland Unified School District's annual budgeting process:

1. The allocation and expenditure of OUSD financial resources shall be aligned to the achievement of continuous improvement in school quality and student outcomes.
2. The allocation of OUSD financial resources to schools shall be maximized.
3. The distribution of OUSD financial resources to schools shall account for varying student needs and neighborhood conditions.
4. School governance teams shall be empowered to budget and expend OUSD financial resources.
5. The general public shall have timely access to accurate, comprehensive, and easily comprehensible OUSD financial management information at the school, department, and district-wide levels.

The overall allocation of funds according to Board Policy (BP 3150), the LCAP and the Strategic Plan starts with the distribution of unrestricted funds to no more than 12% to fund central or infrastructure activities. The remaining 88% of unrestricted funds are allocated to schools either directly as the allocations to sites or as a centrally provided service.



The allocation of the District’s unrestricted funds directly to schools is based on the direction provided by Board Policy #3150 (see Appendix A). It is:

- A base allocation based on enrollment projections by grade
- Additional base allocations to accommodate varying student need
- Supplemental allocations based on LCFF eligible students (low income, English learners, and foster youth), and
- Concentration allocations based on neighborhood factors
- Additional discretionary allocations based on the School Performance Framework (SPF) for each school, to better align resources to the achievement of continuous improvement in school quality and student outcomes.

As school sites make budget decisions for 2017-18, resources that are generated by the LCFF target populations should be used to improve outcomes for those students and aligned with the goals and actions in the LCAP.

III. ABOUT BUDGET DEVELOPMENT IN OUSD

A. What is Budget Development?

Budget Development is the process in which our District formulates its planned budget for the next school year. Each site prepares, reviews, and submits a draft budget for approvals during this process.

At the completion of Budget Development, all site budgets and the overall District budget have been planned in detail and include the number of teachers and other site-based and central office staff for next year, committed expenses for

supplies, finalized requests for central services, and funding for any program that will be carried out in our District for the next year.

B. Who Can Participate in Budget Development?

Everyone!

All members of the OUSD community are involved with and contribute to our Budget Development process. That being said, there are leaders and key stakeholder roles that are actively engaged in a routine manner.

Please see below for details on such roles. This list highlights the key groups and how they work together at a high-level to complete the process.

Principals: School site leaders drive the Budget Development process and are essential representatives for their students and communities. The District looks to Principals to help implement its overarching priorities through the budgeting process as they will serve and align with their students' unique needs. Principals are expected to engage in all required steps of the process and seek additional assistance from central offices, as needed. School Site Councils (SSCs) should be consulted on the overall budget, with final approval on the use of Title I resources. Principals are also responsible for the final submission of their site's budget and will be held accountable if deadlines are missed.

Central Supports: Analysts within Human Resources and Financial Services, the Partners within the Office of Accountability, and other central office department staff are responsible for being available for questions throughout the Budget Development process. Central supports are accountable for providing accurate information and timely responses.

Central Leadership: Our Network Superintendents are responsible for attending consultancies, listening to site leaders, engaging in creative problem solving when necessary, and communicating recommendations and approvals in accordance with the overall Budget Development timeline and process. This group is also charged with ensuring individual site plans and budgets are aligned with the District's vision as articulated in the Updated Strategic Plan and LCAP. Central Leadership is accountable to ensure all decisions are made within the designated timeline.

School Site Council (SSC) & Community at Large: The SSC and community are generally responsible for compiling representative input and communicating values and priorities to school site and district leadership. The SSC must also officially sign off on the use of Title I funds at their site.

Superintendent: The Superintendent will sign-off on all final budget actions in late February. The Chief of Schools and the Network Superintendents will work on his behalf to recommend and ensure sites build budgets aligned with the Superintendent's vision for the District leading up to his official approval.

School Board/Board of Education: The School Board will vote on the proposed budget and be required to approve the overall Budget in June 2017. They will review to ensure that the proposed actions are aligned with their vision for the District and the LCAP.

C. Where does Budget Development Take Place?

Budget Development session for schools will be held **February 28nd – March 13th** for each individual site and for central offices within OUSD. Specifically, there are a series of face-to-face meetings with site leaders and central office support, program experts and leadership that are key steps for the process. These meetings include: Network interface and final budget consultations/lock in sessions.

Additionally, the **Budget Development Tool (BDT)** is the online tool in which the budget is loaded, approved and locked. Site leaders will receive a web-link on training in this tool will be on the District's Intranet on February 17th 2017. From there, site leaders can use lock-in sessions to utilize the Tool to reflect their approved budget.

The Budget Development Tool will be accessible on February 17th and will be made available on the District Intranet and here: <http://bdt.ousd.org>

D. When is Budget Development?

Budget Development officially begins for the District in September when the Superintendent and Board work together to develop the District's Priorities. From there, the remaining of the district begins to priorities their bodies of work and align them with the District Priorities and the LCAP. In Overall, the development process spans from September until late March, at which point conversion to the Adoption Budget begins. Key dates, meetings, and hard deadlines are listed below (see two next pages).



This icon denotes an in-person meeting with Central Office is required.



This icon denotes an in-person meeting with SSC + is required.

Phase & Timing	Events & Deadlines
Phase 1-Planning & Preparation	- Hold 1 SSC Meeting to discuss plans & priorities  Feb 10: Kickoff Meeting for all Site Leaders and Budget Worksheets and Handbook are released  Mid Dec -Jan: Single Plan Student Tool available to sites Feb 17: Budget Development Tool Online Training Available Feb 17: Budget Development Tool Released



Phase 2-Appeals *(Optional)*

Bilingual/Dual Language

A-G Electives

Middle School Electives

- **Feb 10-16:** Principals submit base teacher appeals (if needed) to Network Supt
- **Feb 18-26 :**Network Leadership meets with Principals that submitted an Appeal request 
- **Feb 28:** SPSA Theory of Action Due
- **Feb 28:** Network communicates all final decisions regarding Appeals to Budget Dept.
- **Mar 1-13:** Budget Dept. reflects Appeal decisions in BDT and provides updated worksheets during Lock-in Session
- **Mar 10:** Draft Site Plan for Network Review
- **Mar 24:** Network Review of Site Plan

Phase & Timing

Events & Deadlines

Phase 3- Decision Making & Trades

- *Note:* if SSC meeting does not occur in Phase 3, it must happen within three weeks of Phase 4
- **Feb 28 – Mar 13:** Principals submit requests for base labor trades to Network Supt., HR, and Budget for review & Budget Dept. regenerates budget worksheets & updates Budget Development Tool
- Prior to scheduled Phase 4, principal finalizes all labor and non-labor decisions in preparation for sign-off



- Obtain Approval Sign-offs from HR and Office of Accountability for staffing changes & Title I funding actions
- **EXCEPTIONS FOR SSC SIGN-OFFS**
Schools sites may have SSC meetings scheduled after your Budget Development lock-in session. In order to accommodate your needs, the Budget Department will allow a three-week window from the scheduled lock-in session to validate the approvals from your SSC's. During lock-in session we will allocate your funding as you plan to propose to your SSC and will lock it in place once the SSC approves the budget. If the SSC does not approve the plan within the three-week window, Budget will move the planned funds to object code 4399 (surplus) and will not redistribute until after July 1, 2017.

Phase 4- Final Approvals Meeting & Lock-in

- **Feb 28-Mar 13:-** Principals share final proposed plan to Network Supt, Deputy Network Supt, and Partners from HR, Office of Accountability Partners, and Budget 
 - Principals and FA's enter all budget plans into the Budget Development Tool & ensure proposed plans balance in the tool
 - At the Approvals Meeting, Network Supt. and Principal sign final approval form
- **Mar 31:** All Budget Tools are locked

E.

How has Budget Development Changed from Last Year?

As you read through this handbook, you will likely notice there are a number of changes from 2017-18.

The ultimate goal of Budget Development remains the same - to solidify site budgets and identify program and staffing needs for the next year - but the process through which we achieve this goal is modified for 2017-2018. We have reflected upon the strengths and challenges of last year's cycle, discussed issues and ideas with school site leaders, central support and leadership, and made changes based upon these exercises and engagements. As a result, we have implemented changes to the following areas: online tool, overall process and handbook, and our allocation formula.

1. Overall Process & Handbook

In regards to the overall process and handbook, we have redefined the experience across five phases for all stakeholders to understand what can be expected of them and the interim goals for each phase. The lock-in and consulting phase will now be held simultaneously with the availability of the Budget Development Tool.

Acknowledging the tight timeline and the necessary communications required for schools, Budget has proposed an extension process for the submission of SSC approved documents during the 2017-18 Budget Development process. Of course, we would encourage you to have those discussions before your consulting/lock-in session but for those of you that are unable to meet to get final approval before then, a three week extension will be allowed, subject to the following:

IF YOU CAN PROVIDE US WITH DOCUMENTATION THAT YOU HAVE A SCHEDULED SSC MEETING WITHIN THREE WEEKS FROM YOUR SCHEDULED SESSION, THEN:

- At Consultation/Lock-in session provide your Financial Analyst (FA) with the date that you intend to meet;
- During Consultation/Lock-in session your FA will load your proposed 2017-18 Title I budget into the Budget Development Tool and lock-in with the proposed budget;
- After your SSC meeting, provide documentation to your Office of Accountability Partner that the meeting was held, the budget reviewed, and the Title 1 budget approved by the SSC;
- Budget and Office of Accountability will review outstanding SSC approvals;
- IF APPROVED: Proposed budget will be lock-in and adopted in 2017-18 budget.
- IF NOT APPROVED OR DOCUMENTATION IS NOT SUBMITTED: All Title I budgets will be reallocated to surplus (4399) and adopted in 2017-18 budget. **Adjustment will not be allowed in 2017-18 budgets until mid July 2017.**

2. Allocation of Resources to Schools

To align with the requirements of LCFF and LCAP, the changes for 2017-2018 include:

- **REQUIRED CODING CHANGES:** During the 2016-17 fiscal year there were programs identified as supplemental within the LCAP that were not coded as such within IFAS. Program Improvement and Call Funds were distributed in resource 0000(General Purpose), programs 1101 and 0107, respectively. In 2017-18 in accordance to the LCAP language these funds will be coded in resource 0002-Supplemental, program 1101 and 0107. Therefore, allocations within resource 0002 will reflect an increase. SSO allocations are also impacted by the LCAP recoding. Object code 5741 will reflect in the supplemental resource within the budget development tool.
- **MEASURE G LIBRARY** funds for library services will not be reflected on the budget worksheets released on February 9th, 2017. The Library Department has implemented a application process for the allocation of funds. Once approved, the Library Department will communicate the approved amount and the allocation will be updated on the budget worksheets and budget development tool (BDT)
- **LATE NEWCOMER (after 20 day) FTE** allocations will be reflected within the supplemental resource 0002, in alignment with the projected 2017-18 LCAP.
- **Call for Quality funds will not be appear on budget worksheets until further notice from the program**

F. How Can I Expect to Engage in Budget Development?

IV. PHASE 1: PLANNING & PREPARATION

A. Orientation to Budget Worksheets

A school site's Budget Worksheets are snapshots of the resources that will be made available to a site for the next fiscal year (FY). For FY17-18, there are a total of 2 worksheet summaries (FTE and the Comparison).

1. FTE WORKSHEET

The FTE Worksheet summarizes the site's overall base budget picture and consists of four main sections.

What you see

OUSD 2017-18 BASE FTE WORKSHEET						
123	SCHOOL		FY17-18	FY16-17 (20 day)	Difference	
1. ENROLLMENT						
ENROLLMENT						
	Regular Enrollment		-	-	-	
	Inclusion Enrollment (counted in regular enrollment)		-	-	-	
	SDC Enrollment		-	-	-	
	Newcomers Enrollment (Students Enrolled by 20th day)		-	-	-	
	TOTAL ENROLLMENT FOR PROJECTED BASE FTE		-	-	-	
	Newcomers "Late" Enrollment (Projected incoming students after 20th Day)		-	-	-	
TOTAL ENROLLMENT			-	-	-	
	LCFF - Free & Reduce, ELL & Foster Youth %		0%	0%	0%	
	TITLE I %		0%	0%	0%	
2. SCHOOL SITE BASE UNRESTRICTED FTE'S AND DOLLARS						
CERTIFICATED		2017-2018 FTE	17-18 Total Sal/Benes	2016-2017 FTE	16-17 Total Sal/Benes	DIFFERENCE
	Teachers-Prep (EEIP)	-	-	-	-	-
	Teachers-Classroom/TSA's	-	-	-	-	-
	Teacher Adjustment for Program (Combo, Newcomers, Expansion)	-	-	-	-	-
	<i>School Site Appeals Adjustment - Teachers</i>	-	-	-	-	-
	Total Teachers	-	-	-	-	-
	Principal	-	-	-	-	-
	Assistant Principal	-	-	-	-	-
	Total Administrators	-	-	-	-	-
	Total Certificated	-	-	-	-	-
CLASSIFIED						
	General Classified	-	-	-	-	-
	Attendance	-	-	-	-	-
	Noon supervision	-	-	-	-	-
	Other Classified	-	-	-	-	-
	<i>School Site Flexibility (Trade)Adjustment - Classified</i>	-	-	-	-	-
	Total Classified	-	-	-	-	-
TOTAL BASE UNRESTRICTED FTE'S		-	-	-	-	-
3. SCHOOL SITE BASE CENTRALLY FUNDED SUBSTITUTE COST						
Object Code						
1150	Teacher Sub projection		-	-	-	-
TOTAL CENTRALLY PROVIDED PROJECTED SUBSTITUTE COST		-	-	-	-	0
4. Centrally Provided and Funded FTE- UNRESTRICTED BASE						
Object Code		2017-2018 FTE	Total Sal/Benes	2016-2017 FTE	Total Sal/Benes	FTE DIFF
5721	Custodians	0.0	\$ -	0.0	\$ -	0
5732	Counselors	0.0	\$ -	0.0	\$ -	0
5741	School Site Security Officer(s)	0.0	\$ -	0.0	\$ -	0
5746	Budget Partner (Per Network)	0.0	\$ -	0.0	\$ -	0
5747	Human Resources Partner (Per Network)	0.0	\$ -	0.0	\$ -	0
5755	School Improvement Partners (per Network)	0.0	\$ -	0.0	\$ -	0
5708	Pathway Coaches	0.0	\$ -	0.0	\$ -	0
5709	Regional Athletic Managers	0.0	\$ -	0.0	\$ -	0
57XX	Common Core Teacher Leaders	0.0	\$ -	0.0	\$ -	0
TOTAL CENTRALLY PROVIDED BASE UNRESTRICTED FTE'S		-	-	-	-	-
Summary						
	ENROLLMENT	2017-2018	2016-2017			Difference
		0	0			-
	BASE UNRESTRICTED FTE'S	0.0	\$ -	0.0	\$ -	\$ -
	CENTRALLY FUNDED FTE's	0.0	\$ -	0.0	\$ -	\$ -
	TOTAL UNRESTRICTED STAFFING ALLOCATION (includes projected sub cost)	0.0	\$ -	0.0	\$ -	\$ -

**Also, please note, a site's budget worksheets will be regenerated if their base allocations or discretionary funding amounts change as a result of the Budget Development process, namely during the Appeals or Trades Phases.*

a) Section 1: Enrollment

The first section of the FTE Worksheet details a site's enrollment numbers including the Special Education Inclusion, Special Day Class (SDC), Newcomers, and Newcomer (Late Enrollment) students. Also included are the percentages of students projected to be in the LCFF target populations as well as Title I. This section introduces key statistics of your site. It is important to understand that many of the full-time equivalent employees (FTE) and funding allocations for your site are based on the listed enrollment projections.

1. ENROLLMENT						
ENROLLMENT	Regular Enrollment		-	-	-	
	Inclusion Enrollment (counted in regular enrollment)		-	-	-	
	SDC Enrollment		-	-	-	
	Newcomers Enrollment (Students Enrolled by 20th day)		-	-	-	
	TOTAL ENROLLMENT FOR PROJECTED BASE FTE		-	-	-	
	Newcomers "Late" Enrollment (Projected incoming students after 20th Day)		-	-	-	
TOTAL ENROLLMENT			-	-	-	-
	LCFF - Free & Reduce, ELL & Foster Youth %		0%	0%	0%	
	TITLE I %		0%	0%	0%	

Special Education Inclusion

Inclusion represents an opportunity for students with disabilities who have historically been educated in "special" separate programs to attend their home schools and participate in general education classrooms and curricula with their age-group peers. Inclusion is an evolutionary process through which the needs of the individual students are addressed by general and special education staff who help provide the necessary support to meet the students' needs. The inclusion process teaches staff and students the value of diversity. It provides a learning environment intended to better prepare everyone involved for cooperative living in a diverse community.

Newcomer Program

A newcomer is a student who has been in the United States for less than a year. OUSD provides programming at certain school sites that specifically serve non-English speaking immigrant students in their first 3 years in the United States, as well as some high school students in their 4th year. These sites not only provide English Language Development (ELD) courses aimed at this population, but special content area courses as well as support for mainstreaming. Newcomer sites also have systems in place to provide services outside of the classroom to meet the needs of this population. The formal designation of newcomer sites is made by the Chief of Schools in coordination with ELLMA and newcomer sites frequently receive extra resources to serve these students and provide capacity for sites to receive students throughout the year.

While some newcomers attend nearly every school in OUSD, newcomer programs are located at designated sites where program infrastructure has been established and/or there are historically high concentrations of newcomer students in the neighborhood. Sites with these newcomer programs receive a second layer of projections, developed between the



Enrollment Office and the ELLMA office, to account for the needs of these programs. Sites without these designated programs are still obligated to allocate the resources for English Learners they receive through LCFF (and other sources) to meet the needs of their newcomer students. The guidance below applies exclusively to sites with designated newcomer programs, which, for the 2017-18 school year are listed below. Sites interested in discussing services for their newcomers not listed below are encouraged to engage with ELLMA for thought partnership around allocating resources in service of these students as well as to understand the professional development and other services offered by ELLMA.

Designated Newcomer Programs for 2017-18

Elementary

Bridges at Melrose	Franklin	Garfield
Esperanza & Korematsu Discovery Academy		Manzanita Community School
Melrose Leadership Academy (K-8)		

Middle

Alliance	Bret Harte	Frick
Roosevelt	UPA	Westlake
Frick		

High

Castlemont	Fremont	Oakland High
Oakland International	Rudsdale @ Lakeview	

Newcomer Projections

Newcomer projections are issued for the sites listed above in two categories:

Day 20 Projections - These projections are a subset of the full Day 20 projections issued by the Enrollment office to school sites in late fall. Starting with the 2017-18 budget development cycle, the enrollment office listed newcomer Day 20 projections at the bottom of projection sheets so that sites with designated newcomer programs could determine what proportion of students in a given grade level are predicted to be newcomers. Please note that no Day 20 projections were issued for any elementary sites, even those with designated newcomer programs. Please also note that a zero in these projections boxes does not mean that no newcomers are expected sites without programs, simply that no Day 20 projections exist for that site.

Post Day 20 Projections (Late Comers)- Based upon an analysis of enrollment trends, which fluctuate wildly for newcomers, the ELLMA office issues Post Day 20 projections for newcomers, sometimes referred to in the budget process as “latecomers.” These projections account for the large number of newcomers who arrive after Day 20 and provide for positions to be budgeted at the start of the year to receive these students as the school year progresses. For



the 2017-18 school year, the ELLMA office issued Post Day 20 projections to elementary sites with designated programs for the first time, and continued to issue projections for designated programs at the middle and high school level. Post Day projections do not appear on the projection sheets issued by the enrollment office, and first appear to site leaders when they receive their budget at the start of the budget development office.

The combined number of Day 20 projections and post Day 20 projections represents the total projected size of a newcomer program at a given site. Site leaders are responsible for designing a master schedule that accommodates all projected newcomers not only in newcomer-specific sections but also in electives, PE, and other courses. Compliance with the law, sound instructional design, and honoring student civil rights requires increased integration of newcomer students into the mainstream program of schools after their first year of enrollment in US schools.

Newcomer Staffing and Discretionary Allocations

Newcomer projections (Day 20 and Post Day 20) drive staffing allocation formulas as well as discretionary funds in a manner similar to other projections. Post Day 20 (Late Comers) Allocations are written in LCAP as supplemental (resource 0002) and the FTE will be reflected in this resource. Sites with designated newcomer populations are expected to allocate teachers driven by newcomer projections for newcomer classes, as well as for other sections necessary for a complete newcomer program, such as electives and PE. Non-teaching staff allocations at sites with designated newcomer programs are also expected to be allocated with consideration of the needs of newcomer students along with the rest of school enrollment. Discretionary dollars tied to newcomer projections should be allocated to supplemental materials, staffing, and other activities related to newcomers.

Secondary Newcomer Class Size Ratios

Progress has been made in recent years at maintaining a 25:1 “soft cap” class size for secondary newcomer programs, however secondary designated newcomer programs are still funded at a 32:1 class size. Sites will be able to maintain a 25:1 class size until all schools across OUSD reach 25:1, at which point they must be prepared to accept students up to the 32:1 ratio. This means secondary site leaders must design master programs that permit up to 32 newcomers in newcomer sections as well as the elective and PE classes, although the hope is to maintain a 25:1 class size ratio for the majority of the school year.

Newcomer Projections and Consolidations

Due to the annual demand for more newcomer seats, as well as the well-documented volatility in newcomer enrollment, differences between projected Day 20 newcomer enrollment and actual enrollment are handled differently than other differences between projection and actual enrollment. Except in the case of extreme and unprecedented downturns in newcomer enrollment, sites with designated newcomer programs should not expect to experience consolidation of staff or resources in the event that their Day 20 newcomer enrollment is short of the Day 20 projection for newcomers. In the event that sites with designated newcomer programs experience other shortfalls in enrollment and consolidations, care must be made to ensure that reductions in staffing leave behind a master schedule that permits all projected newcomers to enroll in all necessary classes.



b) Section 2: Base Unrestricted FTE and Dollar allocations

For a site's unrestricted base FTE allocations, the budget worksheet includes the total amount of FTEs for teachers, administrators, and classified staff. In addition to the FTE, the total is shown in dollars and is based on average cost of salaries and benefits.

What you see

2. SCHOOL SITE BASE UNRESTRICTED FTE'S AND DOLLARS						
CERTIFICATED		2017-2018 FTE	17-18 Total Sal/Benes	2016-2017 FTE	16-17 Total Sal/Benes	DIFFERENCE
	Teachers-Prep (EEIP)	-	-	-	-	-
	Teachers-Classroom/TSA's	-	-	-	-	-
	Teacher Adjustment for Program (Combo, Newcomers, Expansion)	-	-	-		
	School Site Appeals Adjustment - Teachers	-				
	Total Teachers	-	-	-	-	-
	Principal	-	-	-	-	-
	Assistant Principal	-	-	-	-	-
	Total Administrators	-	-	-	-	-
	Total Certificated	-	-	-	-	-
CLASSIFIED						
	General Classified	-	-	-	-	-
	Attendance	-	-	-	-	-
	Noon supervision	-	-	-	-	-
	Other Classified	-	-	-	-	-
	School Site Flexibility (Trade)Adjustment - Classified	-			-	-
	Total Classified	-	-	-	-	-
TOTAL BASE UNRESTRICTED FTE'S		-	-	-	-	-

Base Allocations are generated by formula using projected enrollment figures. The FTEs provided through base allocations are not flexible and can only be adjusted through a review process. The review process and form to request an adjustment to the base labor allocation is included in the appendix. Moreover, a site is not responsible for managing the salary and benefits costs of these FTEs and any unfilled positions or vacancies will not result in vacancy savings to site budgets.

The approach, inputs and parameters for the 2017-2018 Base Allocations are detailed below.

Prep Teacher (EEIP) (Elementary, TK-5 Only)

To support teacher growth and honor our contractual obligations, prep teachers are provided within a site's base allocation, as reflected on a site's FTE Budget Worksheet. The table below details the formula for prep teacher allocations.

Number of certificated teachers	FTE Allocation (Recommended)	# of Days per Week
4	0.2	1
8	0.4	2
12	0.6	3
16	0.8	4
20	1.0	5
24	1.2	5
28	1.4	5
32	1.6	5
36	1.8	5
40	2.0	5
<i>EEIP FTE Calculation Formula: On average, an EEIP teacher can provide four 50-minute preparation periods in one day. The calculation formula is as follows: 0.2(one day) divided by 4 (50-minute preparation periods) multiplied by the # of teachers equals FTE allocation</i>		

Student:Teacher Ratios

The District has set the following student: teacher ratios for 2017-2018. The student:teacher ratio informs the number of base teacher FTEs allocated to a site and listed on a site's FTE Budget Worksheet.

For TK & K, 24:1 is a hard cap for each classroom.

For Grades 1-3, 24:1 is the average class-size across the school.

For all other grades, the student: teacher ratios remain unchanged, and are determined by the maximum class sizes permitted in the Oakland Education Association (OEA) – OUSD contract.

$$(Enrollment \# \times 6(Period \text{ per day}) / 5(teacher \text{ class load}) \times 32(class\text{-}size))$$

These ratios are for General Education students only. Schools are assigned additional teachers and other staff to support SDC students.

GRADE SPAN	TK-3	4 th -5 th	6 th -12 th
Student:Teacher Ratio	24:1	31:1	32:1

School Site Leaders (Certificated Administrators)

School site leaders support the management, safety, and professional growth of staff and students. In order to allow for effective impact of these positions, they have been provided to each site as part of base allocations. As captured in the below table, every school site receives 1 Principal, and Assistant Principals can range from 0-4 depending on projected enrollment.

The Ratio of Administrators to Teachers (RAT) includes little margin – to avoid significant financial penalties, we cannot increase the number of certificated administrators relative to the number of teachers.

Type of School	# of Students	Principal	Asst. Principal
Elem K-5	1-650	1	0
Elem K-5	650+	1	1
MS 6-8	1-200	1	0
MS 6-8	201-550	1	1
MS 6-8	551-800	1	2
MS 6-8	801+	1	3
K-8	1-500	1	0
K-8	501-800	1	1
K-8	801+	1	2
G 6-12	200-400	1	1
G 6-12	401-1000	1	2
G 6-12	1001+	1	3
HS 9-12	1-200	1	0
HS 9-12	201-500	1	1
HS 9-12	501-1000	1	2
HS 9-12	1001-1500	1	3
HS 9-12	1501+	1	4



Classified/Clerical Guidelines

Classified/Clerical Staff play a key role in a school site's ability to maintain records and overall school operations as well as help to meet school goals for improved attendance management. Sites receive clerical/classified staff within base FTE allocations. Of these positions, the general clerical, attendance clerk, and noon supervisor are non-negotiable and can only be adjusted through a review process. Other classified/clerical positions, such as library clerk and community assistant, may be "traded" for another FTE or converted into dollars through a review process. The review process and form to request an adjustment to the base labor allocation is included in the appendix.

Type of School	# of Students	Required/Non-Negotiable			Flexible (eligible for "trades")
		General Clerical	Attendance Clerk	Noon Supervisor	Other
Elem K-5	1 to 400	1	0.5	0.4	0
Elem K-5	401 to 600	1	0.5	0.5	0.5
Elem K-5	601 to 800+	1	1	0.6	1
MS 6-8	1 to 400	1	0.8	0	0
MS 6-8	401 to 600	1	1	0	2
MS 6-8	601 to 800+	1	1	0	2.5
K-8	1 to 400	1	0.8	0.4	0
K-8	401 to 600	1	1	0.4	0.5
K-8	601 to 800+	1	1	0.5	1
G 6-12	1 to 400	1	0.8	0	1
G 6-12	401 to 600	1	1	0	2
G 6-12	601 to 800+	1	1	0	3
HS 9-12	1 to 300	1	1	0	1
HS 9-12	301 to 600	1	1	0	2
HS 9-12	601 to 900	1	1	0	3
HS 9-12	901 to 1200	1	1	0	4
HS 9-12	1201 to 1500	1	2	0	5
HS 9-12	1501 to 1800	1	2	0	6
HS 9-12	1801 to 2000+	1	2	0	7

Note: For a list of which type of classified positions are in each bucket, see Appendix(page48).

c) Section 3: Base Centrally Funded Substitute Costs

Substitute teacher costs are included as a base allocation

3. SCHOOL SITE BASE CENTRALLY FUNDED SUBSTITUTE COST					
Object Code			2016-2017		2015-2016
1150	Teacher Sub projection		\$35,539		\$35,539
TOTAL CENTRALLY PROVIDED PROJECTED SUBSTITUTE COST			35,539		35,539

d) Section 4: Centrally Provided and Funded FTE – Unrestricted Base

For **centrally-managed FTE & services**, the budget worksheet lists the services for a site based upon criteria established by the central office. The District provides essential services that are core to a site's operation and are critical to the function of all schools. Most of these centrally-provided base allocations can be increased and purchased at the discretion of the site leader and school community with the use of site-based unrestricted discretionary funds. Some services are not provided centrally, but are available for purchase with unrestricted discretionary funding.

Note for counselors: Counselors are centrally funded and allocated at 500 to 1, above the OEA contract-driven formula of 700 to 1 ensure we maintain the required student to counselor ratios.

4. Centrally Provided and Funded FTE- UNRESTRICTED BASE						
Object Code		2016-2017 FTE	Total Sal/Benes	2015-2016 FTE	Total Sal/Benes	FTE DIFF
5721	Custodians	2.0	\$ 139,058	2.0	\$ 119,400	0
5732	Counselors	0.0	\$ -	0.0	\$ -	0
5741	School Site Security Officer(s)	0.0	\$ -	0.0	\$ -	0
5746	Budget Partner (Per Network)	1.0	\$ 146,108	1.0	\$ 77,256	0
5747	Human Resources Partner (Per Network) (includes Staffing Analyst, Talent Associates & School Ps	1.0	\$ 146,774	1.0	\$ -	0
5755	School Improvement Partners (per Network)	1.0	\$ 8,356	0.0	\$ -	1
5708	Pathway Coaches	0.0	\$ -	0.0	\$ -	0
5709	Regional Athletic Managers	0.0	\$ -	0.0	\$ -	0
TOTAL CENTRALLY PROVIDED BASE UNRESTRICTED FTE'S		5.00	440,296	4.00	196,656	1.00

When a site is purchasing additional services, a services contract must be completed and signed (See **Appendix B**). This contract must be signed by the site and submitted in advance of the Budget Development Lock-in Sessions. *Also please note, for Custodial Services you must complete the form even if you plan to maintain your base allocation.*

Centrally-Provided Services

Centrally provided services are as follows; additional services can be purchased beyond the centrally-provided allocation.

For additional Purchase	Services Available	Site Funded Object Code	Centrally Funded Object Code
	Counselors	5732	5703
	Custodians	5721	5701
	SSOs	5741	5704
	Nurses	5735	5705
	Psychologists	5734	5702



	Tech Services	5737/FTE	
	Budget Partner		5746
	HR Partner	5757	5747
	School Partners		5755
	Pathway Coaches		5708
	Regional Athletic Managers		5709

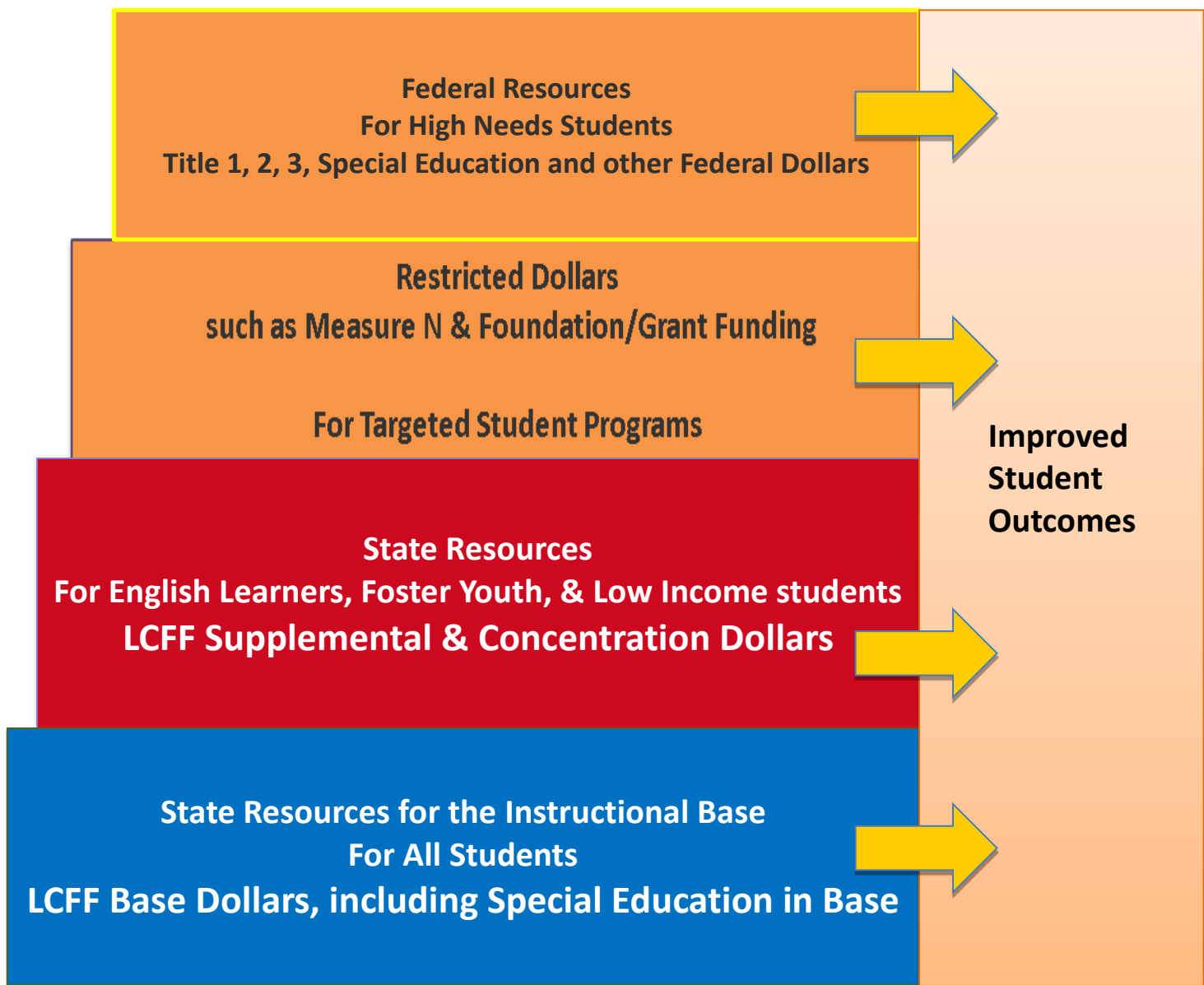
Central Services for Purchase

Service	Site based Object Code
Manhood Development Program Facilitator	5733
Mental Health Provider Intern	5739
Restorative Justice Coordinator	5736
Duplication	5716
Mail Services	5724
Adult & Career Education	5751

SERVICES FOR PURCHASE (p/1.0FTE)	2017-2018
Custodian	\$ 62,637
School Security Officer	\$ 61,119
Manhood Development Program Facilitator	\$ 92,364
Mental Health Services	see program mgr
Restorative Justice Coordinator	\$ 116,712
Community School Program Manager	\$ 125,164
Psychologists	\$ 121,297
School Technology Specialist	\$ 89,455
Adult & Career Education	see program mgr

2. 2017-18 Color of Money Improving Students Outcomes

Below is a chart of the types of money that flows through school sites.



- *LCFF was designed to direct resources to those students who need them the most.*
- *A “Base” level of funding is provided per pupil, with differentiation for grade.*
- *Additional resources are provided for students who are low income, English learners, and foster youth.*



Unrestricted Discretionary Funds

The first column shows the site's **unrestricted discretionary base funding amounts**. These are dependable and guaranteed General Purpose funds provided to a school based on enrollment projections and intended to cover the cost of the site's basic operational and other program needs, including but not limited to additional FTEs, supplies, books, contracted services and equipment to support the school site educational environment. **The usage of discretionary funds should reserve a minimum of 65% for non-salary expenses such as supplies, copier maintenance agreements and so forth.**

Per pupil allocations are driven by grade span and school type.

Please keep in mind if you are utilizing base discretionary funds to purchase an additional FTE, you must complete a request form before February 3. Your planning budget will be charged the **average** salary and

benefits cost (See Appendix D) for the position, no matter the actual cost of the person filling it and unfilled positions or vacancies will not result in vacancy savings to site budgets.

School Type	Discretionary Base amount per student, includes SDC
ELEMENTARY SCHOOL (TK-5)	\$175
TK-8 SCHOOL	\$200
MIDDLE SCHOOL (6-8)	\$225
HIGH SCHOOL (6-12)	\$263
HIGH SCHOOL (9-12)	\$300

Discretionary Formula = (Total Non-SDC + SDC Enrollment) X (Base amount per student)

Supplemental & Concentration Funds

Supplemental & Concentration funds are allocated to the District based upon enrollment of students across three LCFF target populations, namely Low-income, English Language Learners (ELL), and Foster Youth.

More specifically, the Budget Allocation Worksheets reflect funding a site will receive based upon the demographics of enrolled students for Supplemental funding, and based on the site's Z Score (also known as the "Environmental Score") for Concentration funding.

For 2017-2018, approximately \$25.6 million in LCFF Supplemental funds are being allocated to schools. The funds are generated by each enrolled student that is either low-income, English Language Learners (ELL) or foster youth (unduplicated count). The funds are allocated to school sites based upon their 2016-17 percentages of these students so that the funds follow the students.

For 2017-2018, approximately \$2.3 million in LCFF Concentration funds are being allocated to schools. These funds are generated when a District's enrollment of low-income, English Language Learners (ELL), and foster youth is over 55% of total enrollment. For Oakland, the percentage of low-income, ELL and foster youth enrollment is approximately 76% District-wide. Concentration funds are thus allocated to provide additional resources to schools that must also manage and address environmental factors in the surrounding location of the school that impact students. The environmental

factors considered for allocation of Concentration funds are: distance to a high crime/violent area, unemployment rates, proximity to liquor stores and grocery stores, median household income, and number of vacant lots in the area. Sites with a Z-Score (or Environmental Score) of red (6), dark orange (5) and light orange (4) will receive concentration funding at a level of \$100,000, \$50,000, or \$25,000 respectively.

Supplemental Formula = (Non-SDC Enrollment X LCFF %) X (rate per student of \$636)

For Supplemental & Concentration funding, sites are encouraged to utilize these funds to address the needs of the aforementioned demographics and their unique educational needs and allow them to access success, following the goals and actions of the LCAP. PLEASE REFER TO THE ACADEMIC GUIDANCE ON THE USE OF SUPPLEMENTAL AND CONCENTRATION FUNDS IN THE APPENDIX.

To allow the most flexibility with these resources, additional FTEs purchased with LCFF Supplemental or Concentration funding will be charged the **actual** salary and benefits costs for the person filling the position.

Supplemental – Call Funds (0107)

Call for Quality Schools Funds 2017-18

NOTE: These funds are not for ongoing operational school expenses, including general supplies, contracts or activities not directly related to this initiative. Funds must be used for approved expenses. Funds may not be transferred across programs. Funds must be expended by June 30, 2018. Call for Quality Schools funding is not included within Budget 1-Pagers, but is instead allocated following a thorough allocation of base, supplemental, concentration, and relevant measure dollars, to ensure these funds are not supplanting ongoing dollars.

In a continued effort to support quality school development, we are investing in supporting strategic school leaders and their school communities to pursue strategies to build programs that truly meet the diverse needs of our Oakland students and families. To this end, and in accordance with Board policy 6005 Quality School Development, the district has allocated funds to Intensive Support Schools and for other identified highest-need schools. These funds are intended to expand the capacity to support schools aligned to School Performance, School Site Planning, and addressing persistent underperformance and school design challenges.

These funds are explicitly meant ONLY for activities related to the different stages of continuous school improvement and school transformation:

- Assess Context, Program, and School Performance (including SPF)
- Conduct School Quality Review (SQR)
- Community Outreach and Engagement
- Building Capacity of Instructional Leadership Team (ILT) and Parent Teams
- Exposure to Great Schools
- Visioning & Pre-Planning
- Design Thinking & Cycles of Inquiry
- Transformation Plan
- On-site Transformation/Design Plan Implementation Assistance
- Progress Monitoring of Key Plan Elements
- Accelerated programing and intervention





Funding allocation is contingent on a year-by-year basis. Once selected and the plan is approved, sites receive a per pupil allocation (based **ONLY** on Final Enrollment Projections), with 100% allocation for the first year, and decreasing allocations each subsequent year up to three years. For this reason, funds should be used to build capacity and supplement, not supplant the core program. In addition, these funds **CANNOT** be used to replace an Appeal. Schools must plan with the expectation that these funds will not be ongoing.

Schools identified through the *Call for Quality Schools* process in SY 2015-16 and SY 2016-17 have already been identified and notified. Funds must be allocated in accordance with your articulated plan and will be reviewed and approved by your Network Superintendent and the Office of Continuous School Improvement. Schools that were designated as in the Engage & Explore phase for SY 2016-17 and invited to complete a Transformation Plan will receive funding as the plan has been approved.

- Subs - Teacher, Principal
- Travel Expenses
- Translation
- Child care
- Meeting Refreshment
- Extended contract – OUSD staff
- Conference Attendance
- Materials / Curriculum
- Contracted Services Related to Building Capacity of ILT or Transformation/Design Plan
- FTE related to Implementation of Transformation/Design Plan that are **NOT ongoing**

For budget planning advisement, please contact your Network Superintendent or Pablo Villavicencio at pablo.villavicencio@ousd.org.



Funds Allocated by SPF - Instructional Program investment (1101) & Measure G Ed Effectiveness (1442)

Funds

During the 2016-17 fiscal year there were programs identified as supplemental within the LCAP that were not coded as such within IFAS. Program Investment allocations were distributed in resource 0000(General Purpose), programs 1101. In 2017-18 in accordance to the LCAP language these funds will be coded in resource 0002-Supplemental, program 1101.

The table below provides the per pupil allocations for the Instructional Program Improvement funding, Intensive

SPF Designation	Program Investment per student award	Measure G Per student award for Ed Effectiveness	# of schools
Red	\$125	\$90	16
Orange	\$95	\$65	37
Yellow	\$75	\$50	16
Green	\$60	\$40	10
Blue	\$40	\$30	5
ISS Add'l Award	\$10	-	5
Total by Program	\$3,082,260	\$2,142,990	
Total		\$5,225,250	

Support Schools and the Educator Effectiveness (TGDS) funding (see note below).

Note on Educator Effectiveness Funding: Teacher Growth and Development System (TGDS) is the districtwide program for improving educator effectiveness. **All schools must provide for the need to support coverage for peer observers and alternate observers.**

Program Investment Formula = (Non-SDC Enroll. + SDC Enroll.) X SPF Rate per student

TGDS Formula = (Non-SDC Enroll. + SDC Enroll.) X SPF Rate per student

Measure G-Library Services

To provide additional resources to schools for library services, \$1.7 million of Measure G funds will be allocated to school sites to be used for library services. The funds can be used in the following ways:

In 2016 Measure G Library funds were earmarked to improve literacy through developing school libraries. The funding strategy was to distribute funds widely across 63 schools, with the expectation that schools would supplement funds in order to staff libraries and add quality resources. Analysis of this year's development has led us to the conclusion that this strategy, while providing resources, did not significantly increase the number of open libraries or the quality of resources. [New guidelines](#) have been established. In 2017 the funding strategy is to focus and deepen funding at fewer sites in order to assist those schools with existing libraries to improve quality and to assist closed libraries in opening with professional staffing.



2017 Library Funding Process: The goal of the Library Measure G funding is to create equity throughout the District in addition to striving for the quality outlined in the [CA State Model School Library Standards](#).

1. All sites wishing to apply for funding will fill out the 2017-18 Library Funding application.
2. Sites will self-assess the development of their library (see below) and lay out a plan for the library to be open, staffed and resourced using the CA State Library Standards as a guideline to quality.
3. Applications are due **Monday, February 13**. [Application for 2017-18 Library Funding](#)
4. Applications will be collectively reviewed and may require site visits, and approved in time for budgeting for staff in the Budget Development Lock-in. Approved funds will be allocated at this time.
5. Priority for funding will be based on the following factors: School Performance Framework status; Developmental stage of the Library; History of Site-Initiated Prior Funding that the 17-18 request builds upon; and Evidence of Other Resources directed toward the library.

Information on Assessing Developmental Stage of Site Libraries: The [District Library Manager](#) is available for support in understanding the stages by providing an overview and context of OUSD libraries and CA State Standards.

Stage	Description
1	Library currently closed. No dedicated library staff. Current space used for multiple purposes other than library services or programs.
2	Library open minimal hours per week. Staffed by Stip-Subs, teacher without library credential or other staff working in the library. Currently lacking one or more of the following: up to date resources, furniture, technology.
3	Library open 4 - 5 days of the week, with regular class visits, staffed by teacher or MLIS librarian, with adequate amounts of up to date resources, furniture, technology.
4	Library in alignment with CA State Library Standards with Professional Teacher - Librarian (holds both a teacher credential <u>and</u> library credential), 28 books per student with an average copyright date of 2006

[Restricted Resources](#)

For a site's **restricted resources**, the Budget Allocations Worksheets lists the relevant funding by source as well as the total allocated amount.

Please keep in mind if you are utilizing Restricted funding for the purchase of additional FTEs, your budget will be charged the **actual** salary and benefits costs for the person filling position.

For additional details and to view any rules and regulations, please see below.



Title I

The purpose of Title I is to improve instruction in high poverty areas to ensure all students meet high academic standards.

Title I funds can be used to enhance and supplement the existing core program. Title I funds cannot be used to pay for staffing, materials, and/or services that students are required to have as a part of their core educational needs. Please see below for more detailed examples of allowable and non-allowable expenses for Title I. Additionally, all planned expenses for Title I must be officially reviewed, approved, and signed-off by a site's School Site Council (SSC). There are no exceptions to this rule and, as such, SSC engagement must be done in a proactive and meaningful way and align with the overall Budget Development timeline.

ALLOWABLE Expenses:

- Provide extended learning time, e.g. before/after school programs; summer intervention; & pull out focused instruction.
- Instructional materials for extended learning time; supplemental materials.
- Direct services to ensure that students stay in school (nurses, social workers, psychologists, additional counselors, community liaisons).
- Professional Development (PD) for teachers to enable Title I students to meet academic achievement standards.
- Support for PD (extended contracts, paid in-services, overtime, supplemental books, software, and substitutes for PD release time).
- Travel/Conferences (Title I related)
- Light Refreshments at Title I parent events (curriculum and data analysis based – not a social event or SSC meeting).
- Parent involvement activities (presenters, materials, transportation that support parent education to improve academic achievement).
- Supplemental instructional technology
- Field trips and study tours that directly support the core curriculum (no trips to amusement parks – no celebration field trips).

Expenses NOT ALLOWED:

- Regular classroom teachers who do not provide supplemental education.
- Administrative personnel at school sites
- Core Instructional Materials and Textbooks
- Custodial, Athletic, or Medical Supplies
- Meeting refreshments for social events or SSC meetings



After School Funding- 21st Century & ASES

After School Education & Safety (ASES) and 21st Century Community Learning Center (“21st Century”) are State & Federal grants made available to the District as restricted resources. These resources can only be used to support expanded learning programming that occurs outside of the regular hours of the school day. ASES funds can only be used for after school programming. 21st Century funds can be used to support after school, weekend, intercession, and summer programming. Also note, even though 21st Century is a Federal grant, the State applies the rules and flexibilities for this funding as it must be aligned with state policies.

The State sets after school program requirements based on after school grant legislation. Elementary and middle school after school programs must operate every day of the school year until 6pm, and are allowed to close for only 3 days over the course of the school year for staff professional development. High schools must operate a minimum of 15 hours per week.

This funding is received by OUSD in collaboration with community partners. The majority of the after school grant dollars are contracted to community partners who serve in the After School Lead Agency role and are responsible for hiring program staff, operating daily after school programs, and ensuring high quality academic and enrichment programming. Each year in the spring, lead agencies are required to engage in collaborative planning with school leaders to develop after school program and budget plans for the upcoming school year. These plans are approved by the OUSD school board as part of the lead agency contract.

Although most grant funds are contracted to lead agency partners, some funds can stay in school site budgets to cover the cost of teachers working in the after school program on extended contract, classified staff working overtime in the after school program, and after school curriculum and supply purchases. After school grant funds contracted to agencies or left in school site budgets must be used for direct service expenses.

Restricted Title I Allocation & After School Programming (SSC approval required)

The funds allocated to Title 1 schools to supplement not supplant the services that would be provided in the absence of these funds. The funds allocated for After School Programming must be used for expenses incurred outside of the normal school hours. School Site Councils must approve the use of these funds. SSCs can use these funds for instructional support, professional development, technology support, and parent involvement initiatives. Schools are required by law, to document a plan that outlines the appropriate use of these funds and obtain SSC approval of such plan.

Restricted Grants, Contracts & Cooperative Agreements - Resources vary

Grant, contracts, and cooperative agreements (collectively called “sponsored projects”) are externally –funded activities in which a formal written agreement is entered into by OUSD and a sponsor. This form of revenue requires board approval. To load funds into a site’s budget, confirmation (i.e. letter from donor confirming funding in the upcoming school year or board approval documents) must be submitted to the Budget Office prior to the Budget Development Session.



Measure N Funds

The Oakland College & Career Readiness For All Act is established to pay for the implementation of a comprehensive approach to high school education in Oakland that integrates challenging academics with career-based learning and real-world work experiences. This comprehensive approach creates small learning communities of career-oriented pathways, and offers intensive, individualized support to create the conditions for all students to graduate high school prepared to succeed in college and career.

The Goals of Measure N

Decrease the high school dropout rate

Increase the high school graduation rate

Increase high school students' readiness to succeed in college and career

Increase middle school students' successful transition to high school

Reduce disparities in student achievement and student access to career pathways based on race, ethnicity, gender, socioeconomic status, English Learner-status, special needs status, and residency

Permissible Uses of Measure N

Measure N proceeds shall be spent on the following school programs:

To increase support for students in college preparatory courses in every high school to ensure students are qualified for admission to the University of California and other 4-year university systems, and are prepared to succeed in college

To provide work-based learning in every high school, including career exploration, career technical education courses, job shadowing, internships, and job certifications

To reduce the drop-out rate by providing counseling, tutoring, mentoring and other intensive support services to students in danger of not graduating high school

To provide programs to students transitioning from 8th to 9th grade to prepare them to succeed in high school, and to students transitioning from 12th grade to college prepare them for admission and success in college

In order to expend Measure N funds, the expenditures must meet the 5 criteria below:

Be Incorporated in the Measure N Education Improvement Plan that was passed by the Measure N Commission and the OUSD Governing Board.

Align to the purpose of the Measure N Initiative outlined above.

Logically lead to the Measure N Outcome Goals

Be aligned to the permissible uses outlined above.

Not supplant existing programs, positions, or expenditures at the school site that were previously supporting the Measure N Goals and Outcomes.

OUSD High Schools Only: Please reference Proper Justification for Measure N IFAS Requests for examples of justification required when using Measure N funds.



Examples of Permissible Expenses

Planning Grant	Education Improvement Plan (SPSA)
School Site Visits Teacher stipends for planning or implementation of pilot programs Stipends for student alumni to participate in planning process Stipends for parents Pilot programs that promote increased outcomes and may be cornerstones for pathway development Planning meetings to address new designs or inquiry	Salaries: Teachers salaries for shifts in academic program to provide more support, or acceleration. Benefits: Benefits associated with staffing positions outlined above Stipends: Teacher stipends Stipends for student alumni Stipends for parents Staff: Student support positions and salaries associated with the accelerations Consultants to build out programmatic elements to support career pathways Programs and Support Services: Pilot programs that promote increased outcomes that meet the goals of Measure N 9th grade summer bridge and support programs Other innovative programs that have a proven track record of academic improvement Support services for specific student populations that improve their academic outcomes Dual enrollment courses and books Intervention strategies Field trips that are essential to the pathway program of study, CTE courses, project-based learning, etc. Deeper Learning Opportunities: Professional development Conferences School Site Visits Meetings Supplies and materials



Measure G1 Funds

Guidelines for Teacher Retention and Middle School Improvement Act (Measure G1)

Measure G1 – Allowable and Unallowable Expenses:

Important note: G1 funds should be used to supplement, not supplant additional services, staff, programs or materials the site would not otherwise have within the following goal areas:

Goals	Allowable Expenses (some examples of expenses)
Increase access to courses in arts, music, and world languages in grades 6-8	Staff (art, music, world language) Instruments Art supplies Language software and teaching aids Professional development
Improve student retention during the transition from elementary to middle school.	Staffing and other resources that will not supplant pre-existing services
Create a more positive and safe middle-school learning environment.	Staffing and other resources that will not supplant pre-existing services

Unallowable Expenses:

- Core Classroom teachers (except art, music, or world language class)
- Clerical Positions
- Copier Contract
- Medical Supplies
- Meals

NOTE: Pre-existing services, programs, staff or materials that meet the Measure G1 goals above are NOT allowable expenses. *The exception being if a site can demonstrate that funds used for a pre-existing program have been eliminated through budget allocation reductions and that no alternative funding source exists.*

Proposal Process Timeline:

Measure G1 allocations presented with 1-pagers (for planning)	February 10, 2017
Measure G1 self-assessment for each of the goal categories	February 10-28, 2017
MS Sites (including any site with a 6-8 grade configuration) develop Measure G1 grant proposals	February 10-28, 2017
Measure G1 Commission establishment by Board of Education	February 22, 2017
Submit Measure G1 grant proposals Network team for approval prior to Lock-in Session	February 28, 2017
Sites include recommended G1 Grant proposal expenditures in BDT during lock-in sessions	March 1 – 13, 2017
Site Grant proposals presentation to Measure G1 Commission	April 17 - 21, 2017
G1 Commission notifies MS Network of proposals being recommended to Board	May 5, 2017
Approved Measure G1 grant funding loaded in site budgets	July 1, 2017

Sites must complete a diagnostic self-assessment of the school's curricular and safety needs, including an assessment of community demand for arts, music, and language education.

Use of G1 funds should prioritize gaps in the categories identified as a result of the self-assessment.

The following types of data will need to be provided as evidence along with the proposal for services and programs:

- Art - Self assessment
- Music - Self assessment
- World Language - Self assessment
- Elementary to Middle School retention - Enrollment data and analysis
- Safe and Positive School Culture - Culture SPF data: URF, Suspensions, CHKS

Decisions to eliminate funding for existing services, staff, programs or materials in order use Measure G1 funds is considered supplanting and are not allowable.

- During Lock-in session your FA will load your proposed 2017-18 Measure G1 budget into the Budget Development Tool and lock-in with the proposed budget;
- Measure G1 Commission will review grants proposals and make a recommendation to the Board for approval;



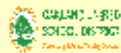
- IF APPROVED: Proposed Measure G1 budget will be locked-in and adopted in the 2017-18 budget.
- IF NOT APPROVED: Measure G1 budgets will be reallocated to surplus (4399) and adopted in the 2017-18 budget. Adjustment to the Measure G1 budget will not be allowed in 2017-18 until after the Measure G1 Commission approves the site's grant proposal.

If you have additional questions please contact Mark Triplett mark.triplett@ousd.org or Linda Pulido-Esquivel linda.esquivel@ousd.org.



3. Comparison Worksheet

The comparison worksheet is a summary that compares the current fiscal year allocations to the projected fiscal year.

OUSD 17-18 BUDGET DEVELOPMENT					
BUDGET ALLOCATION WORKSHEET COMPARISON					
SCHOOL INFORMATION					
Site Name:					
Site Code:					
ALLOCATION FACTORS					
	20Day	17-18	Difference		
ENROLLMENT					
REGULAR	358	344	-14		
SDC	11	11	0		
TOTAL	369	355	-14		
LCFF %	93.3%	93.3%	0.0%		
TITLE 1%	85.6%	85.6%	0.0%		
Z-SCORE	4	4	0		
SPF FACTOR	2	2	0		
ISS FACTOR	0	0	0		
Kick Off Mtg: February 10, 2017 Tool Avail: February 17th Sessions: February 28 – March 13th					
ALLOCATION TYPE	RESOURCE	PROGRAM	20Day Allocation	17-18 Allocation	DIFFERENCE
UNRESTRICTED ALLOCATIONS					
General Purpose BASE FTE	0000	1110	\$ 1,923,676	\$ 1,885,075	\$ (38,601)
General Purpose Base Discretionary	0000	1106	\$ 64,575	\$ 28,733	\$ (35,842)
General Purpose School Site Appeals	0004	1110	\$ -	\$ -	\$ -
General Purpose ISS	0000	1641	\$ -	\$ -	\$ -
General Purpose Program Investment	0000	1101	\$ 35,055	\$ 33,725	\$ (1,330)
General Purpose Supplemental	0002	0002	\$ 201,909	\$ 217,840	\$ 15,931
General Purpose Concentration	0003	0003	\$ 25,000	\$ 25,000	\$ -
Measure G TDGS	0089	1442	\$ 23,985	\$ 23,075	\$ (910)
Measure G Library	0089	1551	\$ 21,000	\$ 21,000	\$ -
TOTAL UNRESTRICTED ALLOCATION			\$ 2,295,200	\$ 2,234,448	\$ (60,752)
RESTRICTED ALLOCATIONS					
Title I	3010	4850	\$ 74,908	\$ 74,908	\$ -
Title I Parent	3010	4854	\$ 1,920	\$ 1,920	\$ -
ASES - AfterSchool	6010	1553	\$ 96,879	\$ 96,879	\$ -
21st Century - AfterSchool	4124	18XX	\$ -	\$ -	\$ -
Measure N (grades 9-12)	9333	1690	\$ -	\$ -	\$ -
TOTAL UNRESTRICTED ALLOCATION			\$ 173,707	\$ 173,707	\$ -
Total Unrestricted			\$ 2,295,200	\$ 2,234,448	\$ (60,752)
Total Restricted			\$ 173,707	\$ 173,707	\$ -
TOTAL SITE BUDGET			\$ 2,468,908	\$ 2,408,155	\$ (60,752)

4. Rules & Flexibilities

Please see below for the required & recommended parameters for Budget Planning in 2017-2018:

Requirements

A Principal is required at every school site.	REQUIRED
Certificated teachers to meet class-size contractual agreements & LCFF requirements, A-G, and other program requirements.	REQUIRED
Attendance Clerk to address attendance accounting and reduction in audit findings.	REQUIRED
General Clerical to provide operations support	REQUIRED
Noon-Supervision (elementary only) to cover supervision of students during non-instructional time.	REQUIRED
To ensure site solvency a minimum 65% of the <u>base discretionary funding</u> allocation must be spent on: Supplies, copier maintenance agreements, Overtime/Extended Time, and other essential operating costs to address needs of students, staff and community.	REQUIRED

Allowable Flexibilities with Approval

Trading Assistant Principal positions for TSA, certificated teacher positions, or classified administrative or other classified positions.	FLEX
Trading clerical, classified, and certificated positions for additional discretionary dollars.	FLEX
Purchasing additional FTE beyond the base allocation (See Appendix D for list of Commonly Purchased FTE Average Salary Costs).	FLEX

Buying Down Class-Size – Allowable with Approval

If using the unrestricted base funds , average salary cost will be used.	FLEX
If using unrestricted supplemental/concentration or restricted resources actual salary cost will be used.	FLEX

Split Positions – Allowable with Approval

FTE can be split, (ex. split a 1.0 FTE position into .5 FTE & .5 FTE)	FLEX
---	-------------

***IMPORTANT NOTE:** Unfilled positions or vacancies in base **WILL NOT** result in vacancy savings to site budgets.

Paying for Positions



<i>How much do I budget in Budget Development (BD) Tool?</i>	
If adding a new/vacant FTE, budget the average salary (and consider a cushion) in the site budget.	If planning for an existing/filled position, budget the actual FTE salary in the site budget.
<i>How much am I charged in IFAS?</i>	
If paying with your unrestricted base discretionary funding allocation, the average salary will be charged to the site's budget. <i>Note: you will see actuals in IFAS, but are not responsible for covering negatives nor are salary savings available to you.</i>	If paying with unrestricted supplemental or concentration funding or restricted resources funding, the actual salary will be charged to the site's budget.

5. Guide for Community Engagement and SSC Discussions

- A school must engage with their School Site Council at all stages of the 17-18 Single Plan for Student Achievement (SPSA) planning and budget development. Specifically the SSC should review and approve each “program” section of the SPSA, including for each Major Improvement Strategy: the School Goal, the Root Cause Analysis, the Major Improvement Strategy and Key Practices.
- NOTE: For the draft “program” planning done using the SPSA V1 tool, SSC review and approval of the program sections is not necessary. This tool is designed to support quality program planning, with teacher leadership and the SSC, in order to arrive at a 17-18 Budget, built on agreed budget priorities. Following budget development, the school will have several weeks to finalize the program sections in the formal SPSA tool and to get SSC review and approval of it.
- According to the new LCAP guidelines, the principal must indicate that the SSC has specifically reviewed LCAP Discretionary, Supplemental, and Concentration funds expenditures, as well as Partnership Academy, 21st Century Community Learning, and After School Learning & Safehood funds expenditures. The spirit of this new guidance is that schools should make sure their community clearly understands how all funds are spent in support of the school's continuous improvement. Transparency is the key. However, it should also be noted that “reviewed” is not the same as “approved”, and principals should carefully facilitate the SSC's understanding of this distinction. Agenda minutes should be sure to use specifically the language “reviewed”.
- As has always been the case, the principal must indicate that the SSC has specifically approved, by formal vote, all Title I funds expenditures. In addition, if a school funds staff FTE (not simply consultant services) out of 21st Century Community Learning and After School Learning & Safehood resources, they must also have SSC approval. Again, agenda minutes should be sure to use specifically the language of “approved” and record the SSC vote.
- Given that sometimes at a school's Budget Development session new information comes to light that changes budget decisions made with SSC approval, District leadership is now requiring that principals arrive at their Budget session with SSC-reviewed Staffing, Basic Ops, and Non-Labor plans which outline the ranked priorities a school has for its expenditures. SSCs should review these plans and specifically approve the Title I prioritized expenditures, so that, if a principal must make adjustments to their school's budget at the Session, they have reviewed/approved priorities to guide these adjustments.



6. Required Actions & Successful Outcomes for Phase 1

Required Actions & Successful Outcomes for Phase 1	
ACTION 1: REVIEW ENROLLMENT, PERFORMANCE DATA & CURRENT YEAR BUDGET	
	- OUTCOME 1(a): Site leader clearly understands current year program design and budget and has a general sense of what has been working, what they would like to continue, and potentially discontinue for next year. - OUTCOME 1(b): Site leader and central office support staff have worked together to gather necessary data and launch planning efforts.
ACTION 2: REVIEW HANDBOOK	
	OUTCOME 2: Site leader understands overall process, timing, rules, flexibilities and how they will engage with central offices and their community throughout Budget Development.
ACTION 3: REVIEW 1-Budget Worksheet	
	- OUTCOME 3(a): Site leader has a basic understanding of next year's resources (budget worksheets) and is beginning to envision strategic approach for next year concerning: program design, allocation of discretionary resources and a master schedule is in draft form. - OUTCOME 3(b): Site leader has thoroughly reviewed teacher base allocation as provided via staffing formula (budget worksheets) and has determined if an appeal for additional teachers is needed.
ACTION 4: ATTEND KICKOFF MEETING & OTHER TRAININGS AS NEEDED	
	OUTCOME 4: Site leader is equipped with knowledge and tools to execute a successful Budget Development process.
ACTION 5: SCHEDULE CONSULTATIONS WITH CENTRAL OFFICES & COMMUNITY	
	- OUTCOME 5(a): Site and central office stakeholders scheduled all meetings for Budget Development and blocked out time on calendars as well as made arrangements for coverage. - OUTCOME 5(b): Site leader has engaged SSC and community to identify major improvement strategies/key practices for the next year.
ACTION 6: PREPARE TO ALIGN RESOURCES TO SCHOOL PLAN FOR STUDENT ACHIEVEMENT (SPSA).	
	OUTCOME 6: The SPSA strategies are prioritized funding actions for next year's budget.
ACTION 7: CONSIDER MENU OF ADDITIONAL CENTRAL SERVICES	
	OUTCOME 7: Overall program design is being considered and central services are being proactively thought of and incorporated into the plans at an appropriate time.

V. PHASE 2: APPEALS (OPTIONAL)

Required Actions and Successful Outcomes for Phase 2

Important Note:

The Appeals phase is ***optional*** and should only be carried out by sites **requesting adds to their base teacher FTE allocation** specifically to accommodate needs for one of the following programs:

- Small bilingual classes
- Middle school electives
- High school A-G requirements

Should a site not engage in appeals, they should continue on with Phase 3: Consulting.

ACTION 1: AS NEEDED & WITHIN CRITERIA, SUBMIT APPEALS FOR ADDS TO BASE TEACHER ALLOCATION.

- OUTCOME 1 (a): Appeals, including Appeals form (see Appendix E) & Master Schedule, are submitted to Network by Jan. 27 deadline.
- OUTCOME 1 (b): Networks and Principals meet to review and discuss appeals.
- OUTCOME 1 (c): Budget Dept. receives final decisions and budget tool & worksheets will be updated if appeal is granted.

ULTIMATE GOAL: ALL APPEALS SUBMITTED AND DENIED OR APPROVED.

VI. PHASE 3: DECISION MAKING & TRADES

Required Actions and Successful Outcomes for Phase 3	
<i>ACTION 1: DECIDE WHICH ACTIONS TO FUND (incl. Central Services).</i>	
	OUTCOME 1: Program design is becoming more full and realized. Sites begin to sign-off on central service contracts.
<i>ACTION 2: COMMUNICATE LABOR "TRADES".</i>	
	OUTCOME 2: Final staffing footprint for site and ratios are confirmed as compliant. 1-pager is regenerated by Budget Dept.
<i>ACTION 3: DETERMINE HOW TO FUND EACH PLANNED ACTION WITHIN ALLOCATED RESOURCES.</i>	
	OUTCOME 3: Program design and staffing footprint are solidified identifying acceptable and available funding resources. Budget Development Tool should be accessed and utilized for this action.
<i>ACTION 4: SIGN CENTRAL SERVICE CONTRACTS.</i>	
	OUTCOME 4: Central services are confirmed.
<i>ULTIMATE GOAL: SITE LEADERS HAVE 1 PLAN FOR APPROVALS.</i>	



VII. PHASE 4: CONSULTING, FINAL APPROVALS MEETING & LOCK-IN

Required Actions and Successful Outcomes for Phase 4	
<i>ACTION 1: SECURE APPROVAL FROM SSC+ ON ALL FUNDED ACTIONS.</i>	
	OUTCOME 1: Community buy-in is reflected in budget & SPSA moving forward.
<i>ACTION 2: SECURE SSC SIGN-OFF & OFFICE OF ACCOUNTABILITY APPROVAL ON TITLE I.</i>	
	OUTCOME 2: Site enters Title I allocations into tool. Site can plan and hire with Title I funds as needed.
<i>ACTION 3: SECURE APPROVAL FROM HR ON ALL STAFFING CHANGES.</i>	
	OUTCOME: Site receives sign-off form and enters all proposed changes into tool. Site will be able to plan and hire with funds as needed.
<i>ACTION 4: PLAN/ENTER APPROVED DISCRETIONARY EXPENSES IN TOOL.</i>	
	OUTCOME 4: Plan is reflect as much as possible in tool prior to your lock-in session in tool and balances. Site leader is ready for budget lock-in session.
ULTIMATE GOAL: SITE LEADERS HAVE 1 APPROVED PLAN AND PREPARED TO REFLECTED IN BUDGET DEVELOPMENT TOOL.	
<i>ACTION 5: PRINCIPALS SHARE FINAL PROPOSED PLAN WITH CENTRAL OFFICE LEADERSHIP AND PARTNERS.</i>	
	OUTCOME5: Budget & plan are agreed upon by all stakeholders.
<i>ACTION 6 PRINCIPAL & NETWORK SUPT SIGN FINAL APPROVALS FORM.</i>	
	OUTCOME 56 Budget & plan are confirmed for next year.
<i>ACTION 7: CLOSE & LOCK TOOL AT MEETING.</i>	
	OUTCOME 7: No changes can and will be made until FY 2017-2018 (July at earliest).
ULTIMATE GOAL: PLAN & BUDGET ARE FINAL & LOCKED UNTIL NEXT FY.	



APPENDICES TO THE 2017-2018 BUDGET DEVELOPMENT HANDBOOK



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Board Policy 3150

OAKLAND UNIFIED SCHOOL DISTRICT Board Policy

BP 3150

Business and Non Instructional Operations

Results- Based Budgeting

The Board Policy on Results-Based Budgeting provides policy direction to the Superintendent regarding the Oakland Unified School District's continuous budget development process. The Board Policy on Results-Based Budgeting is directly aligned to and builds upon Board of Education policies on School Governance and Quality School Development.

The Board of Education hereby establishes the following principles to guide the Oakland Unified School District's annual budgeting process:

1. The allocation and expenditure of OUSD financial resources shall be aligned to the achievement of continuous improvement in school quality and student outcomes.
2. The allocation of OUSD financial resources to schools shall be maximized.
3. The distribution of OUSD financial resources to schools shall account for varying student needs and neighborhood conditions.
4. School governance teams shall be empowered to budget and expend OUSD financial resources.
5. The general public shall have timely access to accurate, comprehensive, and easily comprehensible OUSD financial management information at the school, department, and district-wide levels.

Within the context of established OUSD strategic priorities, state and federal regulations, and collective bargaining agreements, the Board of Education hereby establishes its intent to:

1. Adopt three-year district-wide School Quality Improvement goals, benchmarks, and priorities (i.e. Balanced Scorecard, Local Control Accountability Plan) toward which every school and every central administration department is responsible for achieving steady measurable progress.
2. Hold every school responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that enables each school to realize steady measurable progress toward achieving Board-adopted School Quality Improvement goals and growth targets.
3. Hold every central administration department responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that demonstrates how each department is achieving steady measurable progress toward providing the supports each school needs to achieve their School Quality Improvement goals and growth targets.
4. Maximize the allocation of all Unrestricted General Fund revenue (i.e. Local Control Funding Formula – Base, Supplemental, Concentration, and local tax revenue) to schools by:
 - a. First, paying all legally required district-wide obligations (e.g. State Emergency Loan, charter school pass-through payments, audit findings).
 - b. Second, allocating up to 12% of all Unrestricted General Fund revenue to support district-wide central administrative services (e.g. finance, human resources, performance management, instructional services, legal services, district leadership).
 - c. Third, paying the following services to schools:
 1. Special Education



2. Custodial and Buildings & Grounds
3. School Police & School Security Officers
4. School Nurses
5. School Counselors
 6. Specified Enrichment Resources (i.e. summer school, music, art)
5. Allocate to schools all remaining Unrestricted General Fund revenue based on the projected student enrollment of each school, including allocating a differential amount of revenue to schools based on the number of students enrolled at each school who:
 - a. Are in elementary schools, middle schools, and high schools
 - b. Qualify for the Federal Free & Reduced Price Meals Program
 - c. Are English Learners
 - d. Are in Foster Care
 - e. Reside in high-stress neighborhoods

1/15/14



2017-18 Request to Appeal Base Teacher FTE Allocation

Explanation The base staffing formula is designed by OUSD leadership to provide an equitable base of classroom teachers all schools based on contracted class size maximums and state class size regulations. However, due to special programs or enrollment configuration, some schools may not be able to provide a base program with the number of teachers determined by the formula. This form must be completed in order to appeal the number of centrally-funded base teachers allocated to a school.

- Instructions**
1. After reviewing the base staffing allocation on your FTE Budget Worksheets, please complete all sections of this form to request additions to your centrally-funded base teacher allocation.
 2. Submit the completed form to your Network Superintendent, who will schedule an in-person meeting to review your appeal.
 3. Upon full approval, the Budget Development Tool will be updated and during your session you will receive a budget worksheet reflecting your adjusted staffing.

Why are you requesting an appeal?

School Level	Program Requiring Additional Teacher FTE	Description of Program Need (not met by formula)	Number of FTE requested
6-8 or 6-12	Middle School Electives	School is unable to provide one elective class for each middle school student.	
9-12 or 6-12	A-G course offerings	School is unable to provide full A-G course offerings for each high school student.	
TK-5 or TK-8	Bilingual	School has a bilingual program that is too small to generate enough teachers to meet maximum class sizes.	

Justification *For your in-person meeting, please prepare:*

- ☐ A draft master schedule demonstrating how your classes would be configured with and without the additional teacher(s) you are requesting. Be sure to show the class sizes or number of teacher contacts without the additional teacher(s).
- ☐ Details or other information about the size and needs of the student population that will not be served if the additional teacher FTE is not allocated.
- ☐

Review

Signature	Yes	No	Reason
Network Supt			
Chief of Schools			
SBO/ CFO			

Budget Use Only

Entered Adj in 1-pager tool	By: Date:	1-pager re-generated	By: Date:	1-pager emailed to Principal & FA	By: Date:
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2017-2018 Request to Adjust Base Labor Staffing Formula for

School Site Name

Explanation

The base staffing formula is designed by OUSD leadership to provide an equitable base program to all schools. However, some schools may have core program staffing that varies from the formula but still meets minimum functional requirements. There are three types of adjustments you may request.

Type of Request	Notes
Increase: Use discretionary dollars to purchase additional positions.	Positions are budgeted and charged at average cost
Increase or Decrease: Trade positions within the base labor allocation.	e.g. reduce Other Classified FTE to increase Attendance FTE
Decrease: Eliminate or reduce base labor allocation for cash.	

Instructions

4. After reviewing the base staffing allocation on your one-pager, please complete all sections of this form to request changes within your base staffing allocation.
5. Submit the completed form to your Network Superintendent, who will review and forward to HR and Budget leadership for approval.
6. Upon full approval, you will receive a revised one-pager reflecting your adjusted staffing and the remaining balance of base discretionary dollars available.

What adjustment are you requesting?

Position Type	Allocated FTE from one-pager	Increase by	Decrease by	Remaining FTE after adjustment
Teacher				
Principal				
Assistant Principal				
General Clerical				
Attendance				
Noon Supervision				
Other Classified				

For requests to increase:

Please describe how you plan to pay for necessary operational expenses with your remaining dollars.



For requests to decrease:

Please describe how you plan to complete all required functions with remaining staff allocation.

Are you seeking to eliminate or reduce a currently filled position? ____ Yes ____ No

List the position title(s) and the affected employee(s) here:

UPC: _____

EMPLOYEE NAME: _____

EMPLOYEE ID: _____

Review

Signature		Yes	No	Reason
Network Supt				
HR				
Budget				



Commonly Purchased Positions by Type, Average Costs for 2017-2018

The table below shows the average costs, including salaries and benefits, for positions purchased with base resources. If a site chooses to purchase additional FTE using base discretionary funding, the site budget will be charged according to the below figures. Conversely, if a site chooses to reduce a base funded position, the below figures indicate the amount of cash that will be newly available in their base discretionary budget.

Position Type	17-18 Avg. Cost
Teacher	\$92,363
Principals	\$163,715
Assist. Principals	\$133,269
General Clerical	\$89,901
Attendance Clerk	\$57,557
Noon Supervisors	\$28,031
Other Clerical	\$57,717

The table below shows the positions included in each Position Type category. For more information regarding the salary and minimum requirements for these positions and others, please contact your assigned Staffing Analyst in the Talent department.

ATTENDANCE	NOON SUPERVISOR
ATTENDANCE CLERK	NOON SUPERVISOR
STUDENT ATTENDANCE COMPLIANCE OFFICER	OTHER CLASSIFIED
GENERAL CLERICAL BILINGUAL	COMMUNITY ASSISTANT
ADMINISTRATIVE ASSISTANT I (BILINGUAL)	COMMUNITY ASSISTANT BILINGUAL
ADMINISTRATIVE ASSISTANT II (BILINGUAL)	COMMUNITY RELATIONS ASSISTANT I
ADMINISTRATIVE ASSISTANT III (BILINGUAL)	COMMUNITY RELATIONS ASSISTANT II
CLERK BILINGUAL	COMMUNITY RELATIONS ASSISTANT I BIL
GENERAL CLERICAL	COMMUNITY RELATIONS ASSISTANT II BIL
ADMINISTRATIVE ASSISTANT I	EXTENDED DAY SITE LIAISON
ADMINISTRATIVE ASSISTANT II	CASE MANAGER
ADMINISTRATIVE ASSISTANT III	OUTREACH CONSULTANT
RECEPTIONIST	PROGRAM MANAGER COMMUNITY SCHOOL
CLERK	INSTRUCTIONAL ASSISTANT (BILINGUAL)
CLERK INTERMEDIATE	INSTRUCTIONAL ASSISTANT K-12
CLERK ELEMENTARY SMALL	INSTRUCTIONAL ASSISTANT-COMPUTER OPERATOR
CLERK ELEMENTARY LARGE	TECHNICAL SKILLS ASSISTANT
SECRETARY ELEMENTARY SMALL	INTERVENTION SPECIALIST
SECRETARY ELEMENTARY LARGE	PE ATTENDANT
SECRETARY MIDDLE	LIBRARY CLERK
SECRETARY HIGH	LIBRARY CLERK SENIOR
OFFICE MANAGER	TEXTBOOK CLERK
	SCHOOL TREASURER



Direct Service Agreement Forms

The menu presented below is meant to provide an understanding of the direct services currently being offered by the district, and to provide transparency around the associated cost and funding sources for each of the offerings. For the fiscal school year 2017-2018, school sites can order direct services from OUSD Service Areas by using funds available at your school site. As you complete your RBB session, consider how much money to set aside to purchase optional services.

Central Support Sites offering direct services:

- **Custodial Services-** Centrally-allocated custodians will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff
- **Health Services (Nurses)**
- **Community School Program Manager**
- **School Security Officers** – Centrally-allocated SSOs will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **Restorative Justice Coordinators**
- **Counselors-** Centrally-allocated counselors will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **AAMA Facilitators**
- **Psychologist** Centrally-allocated psychologist will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **Mental Health**
- **Family Literacy**

Please note: OUSD school sites are required to complete a direct service agreement form for every direct service that they wish to receive.

Other Services: (do not require service agreements)

- Postage (5724) – Fund as needed
- Duplication Services (5716) - Fund as needed
- Food Services(5758) – Fund as needed
- B&G Work Orders (5720) – Fund as needed



Service Agreement Form Counseling Services (Object 5732)

"Caring for students in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: To exceed OEA obligations central office will provide base counseling services at a level targeted from District-wide obligation of 500:1 based on number of students, grade 7 -12. To supplement and/or request additional counselling services, please complete this form and allocate funds in object code 5732.

CONTACT: Susanna Ramirez, Executive Officer, Susanna.ramirez@ousd.k12.ca.us

FUNDING OPTIONS: Schools may use General Purpose (GP) or Discretionary, Concentration and/or Measure G1 funds to fund Counseling services

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase a Counselor

☐ **Counselor: (0.25 FTE)**
Price: \$24,791 Resource: _____ Org Key: _____

☐ **Counselor: (0.50 FTE)**
Price: \$49,582 Resource: _____ Org Key: _____

☐ **Counselor: (0.75FTE)**
Price: \$74,3723 Resource: _____ Org Key: _____

☐ **Counselor: (1.0 FTE)**
Price: \$99,164 Resource: _____ Org Key: _____

TRACKING INFORMATION:

Principal Signature: _____

School Site Financial Analyst Signature: _____

Network Deputy/Superintendent: _____

Counseling Services: _____



Service Agreement Form Custodial Services (Object 5721)

"Optimizing the educational environment in support of academic achievement"

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the recommended level of custodial services prior to completing this form. If you would like to appeal your recommended allocation, please complete this form and submit it to your FA.

CONTACT: Roland Broach, Executive Director of B&G. Roland.Broach@ousd.org (x8352)

FUNDING OPTIONS: Schools may use General Purpose (GP) only to fund regular custodial allocations (5721). Prop 49/ASES may fund of up to \$1,500 (5731) to cover custodial overtime expenses during the after-school program. DO NOT USE object code 2220 for after school overtime of the day custodian. Also note that supplies and materials for the after-school program are not included in this amount.

SERVICE OPTIONS:

☐ **Yes!** I agree to the recommended level of service for my site indicated on the Custodial Services Recommended Level of Service Spreadsheet

☐ **No.** I would like to appeal my recommended level of service. I believe that the recommended level of service is not correct for my site for the following reasons:

Appeal Rationale:

Here are the changes I would like to request:

- ☐ **Additional Service**
I wish to increase my service from _____ FTE to _____ FTE
- ☐ **Reduced Service**
I wish to decrease my service from _____ FTE to _____ FTE
(A plan to ensure my site is clean and the OUSD Cleaning Standards are met is **REQUIRED** - OUSD Cleaning Standards are posted on the Site Deliverables and Documents intranet site)
- ☐ **Reduced Square Footage**
Please reduce the square footage that custodial services is required to clean. Reduce my square footage from _____ sq feet to _____ sq feet
- ☐ **Community Cleanup Campaign**
I understand that the custodians assigned to my site will not be asked to clean the following rooms during regular hours.
Summary of plan:
- ☐ **Other Conditions**
I guarantee that the custodians assigned to my site will not be asked to clean the following rooms during regular work hours:

TRACKING INFORMATION:

FTE Total: _____ School Org Key: _____

Principal Signature: _____

Network Deputy/Supt Signature: _____

Financial Analyst Signature: _____

Executive Director, B&G Signature: _____



Service Agreement Form School Security Officer (Object 5741)

"Optimizing the educational environment in support of academic achievement"

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the Central Funded SSO allocation prior to completing this form. If you would like to order additional FTE, please complete this form and submit it to your FA.

CONTACT: Jeff Godown, Chief of Police. Jeff.Godown@ousd.org (x3679)

FUNDING OPTIONS: Schools may use Base Discretionary, Concentration and/or Supplemental dollars to fund a School Site Security Officer –SSO in object code (5741). Prop 49/ASES may fund overtime expenses during the after-school program use object code 2225.

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase a School Site Security Officer at the following level of coverage:

☐ **1.0 FTE School Site Security Officer**
Price: \$61,119 Resource: _____ Org Key: _____

☐ **.80 FTE School Site Security Officer**
Price: \$48,895 Resource: _____ Org Key: _____

☐ **.75 FTE School Site Security Officer**
Price: \$45,839 Resource: _____ Org Key: _____

☐ **.50 FTE School Site Security Officer**
Price: \$30,560 Resource: _____ Org Key: _____

☐ **2.0 FTE School Site Security Officer**
Price: \$122,238 Resource: _____ Org Key: _____

TRACKING INFORMATION:

FTE Total:

School Org Key:

Principal Signature:

School Site Financial Associate Signature:

Network Executive Officer Signature:

Police Services Authorization:



Service Agreement Form Technology Services (Object 5737)

"Caring for student technology advancement in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: Technology Services provides a variety of technology support services directed at maintaining overall. These services include

CONTACT: Susan Beltz, Deputy Chief of Technology Services. Susan.Beltz@ousd.org

FUNDING OPTIONS: Schools may use Base Discretionary dollars to pay for Computer Technician services. .

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase additional Technology support, above and beyond the minimum coverage already provided by the central office.

- ☐ **Computer Technician: ½ Day Each Week (0.1 FTE)**
Price: \$8,945 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 1 Day Each Week (0.2 FTE)**
Price: \$17,891 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 1½ Days Each Week (0.3 FTE)**
Price: \$26,836 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 2 Days Each Week (0.4 FTE)**
Price: \$35,782 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 2½ Days Each Week (0.5 FTE)**
Price: \$44,727 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 3 Days Each Week (0.6 FTE)**
Price: \$53,673 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 3½ Days Each Week (0.7 FTE)**
Price: \$62,618 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 4 Days Each Week (0.8 FTE)**
Price: \$71,564 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 4½ Days Each Week (0.9 FTE)**
Price: \$80,509 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 5 Days Each Week (1.0 FTE)**
Price: \$89,455 Resource: _____ Org Key: _____

TRACKING INFORMATION:

Principal Signature:

Network Signature:

Financial Analyst Signature:

Technology Signature:



Service Agreement Form Adult and Career Education, 2017-18 (Object 5751)

School Name: _____ Site Number: _____ Principal Name: _____

School Year: _____

OVERVIEW: Support for Family Literacy Programs.

CONTACT: Chandra Kendrix, Administrative Staff Support, Adult and Career Education.
chandra.kendrix@ousd.org (273-2367)

FUNDING OPTIONS: Schools may use Base Discretionary Unrestricted funds for GED and Family Literacy instruction. Schools may also use Title I funds for ESL Family Literacy instruction.

SERVICE OPTIONS:

☐ **Yes!** I agree to subsidize the Adult and Career Education instructional services for my site in implementing the District's strategic plan for Full Service Community Schools:

School Org Key 1: _____ Amount: _____

School Org Key 2: _____ Amount: _____

TRACKING INFORMATION:

Principal Signature/Date: _____

School Site Financial Analyst Signature/Date: _____

Network Leadership Signature/Date: _____

Office of Accountability Signature/Date: _____

Adult and Career Education Coordinator: Signature/Date: _____



Service Agreement Form Psychological Services (Object 5734)

"Caring for student health in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: In addition to mandated special education assessment, School Psychologists can provide a variety of mental health and behaviour intervention services directed at promoting the social-emotional functioning of students. Such services include student counselling (group/ individual), crisis support, consultation with staff and parents regarding student behavioural interventions, coordination of and participation in SST/504 meetings, and implementation of class/ and school- wide social-emotional learning programs.

CONTACT: Valerie Lopes, Coordinator. Valerie.Lopes@ousd.org (x3718)

FUNDING OPTIONS: Schools may use Base Discretionary, Concentration and/or Supplemental dollars, or Title I funding source to pay for psychological services.

SERVICE OPTIONS:

- ☐ **Yes!** I would like to purchase additional psychological prevention/intervention services, above and beyond the mandated minimum coverage already provided by the central office.
- ☐ **School Psychologist: ½ Day Each Week (0.1 FTE)**
Price: \$12,130 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 1 Day Each Week (0.2 FTE)**
Price: \$24,260 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 1½ Days Each Week (0.3 FTE)**
Price: \$36,389 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 2 Days Each Week (0.4 FTE)**
Price: \$48,520 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 2½ Days Each Week (0.5 FTE)**
Price: \$60,649 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 3 Days Each Week (0.6 FTE)**
Price: \$72,778 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 3½ Days Each Week (0.7 FTE)**
Price: \$84,908 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 4 Days Each Week (0.8 FTE)**
Price: \$97,038 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 4½ Days Each Week (0.9 FTE)**
Price: \$109,437 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 5 Days Each Week (1.0 FTE)**
Price: \$121,297 Resource: _____ Org Key: _____

TRACKING INFORMATION:

Principal Signature: _____

Psychology Coordinator Signature: _____

~~School Site Financial Analyst Signature:~~
OUSD 2017-18 Budget Development Guide

~~Network Signature:~~



Service Agreement Form Mental Health Intern (Object 5739)

"Optimizing the educational environment in support of academic achievement"

School Name: _____

Site Number: _____

Principal Name: _____

OVERVIEW: Mental Health Interns are deployed to school sites to provide classroom intervention; professional development for staff; individual, group, and family counselling services; and case management.

CONTACT: Barbara Mc Clung, Director of Behavioral Health Initiatives, Barbara.McClung@ousd.org

FUNDING OPTIONS: Schools may use General Purpose (GP), Discretionary and/or Concentration funds to fund the Mental Health Interns

☐ Yes! I am interested in purchasing the services of a Mental Health Intern for the 2017—2018 school year.

I am interested in purchasing:

☐ Standard Service Package

Price: \$18,000/school. Object Code: 5739. Resource: _____ Org Key _____

☐ No. I do not plan to purchase the services of a Mental Health Interns for the 2017—2018 school yr.

☐ I am simply not interested.

☐ I would really like to purchase this service, but I do not have sufficient funds available in the appropriate resources. The maximum I could pay is: _____

Total Amount Ordered: \$ _____

School Resource/Org Key & Object Code _____ Amount: _____

_____ Amount: _____

Principal Signature: _____

School Site Financial Associate Signature: _____

CSSS Department Signature _____



Service Agreement Form Restorative Justice Facilitator (Object 5736)

"Optimizing the educational environment in support of academic achievement"

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the recommended level of restorative justice services prior to completing this form. If you would like to appeal your recommended allocation, please complete this form and submit it to your FA.

CONTACT: Barbara McClung, Director of Behavioral Health. (Barbara.McClung@ousd.org) (415) 533-3709

FUNDING OPTIONS: Schools may use General Purpose (GP), Discretionary and/or Concentration funds to fund restorative justice services

SERVICE OPTIONS:

☐ Yes! I am interested in purchasing the services of a Restorative Justice Facilitator for the 2017—2018 school year.

I am interested in purchasing:

☐ 1.0 FTE Standard Service Package

Price: \$86,000/school. Object Code: 5736. Resource: _____ Org Key _____

☐ 0.5 FTE Partial Service Package

Price: \$43,000/school. Object Code: 5736. Resource: _____ Org Key _____

☐ *Restricted Service Package

Price: \$25,000/School Grant funded middle and high schools **ONLY**.

Object Code: 5736. Resource: _____ Org Key _____

☐ No. I do not plan to purchase the services of a Restorative Justice Facilitator for the 2017 – 2018 school year.

☐ I am simply not interested.

☐ I would really like to purchase this service, but I do not have sufficient funds available in the appropriate resources. The maximum I could pay is: _____

Total Amount Ordered: \$ _____

School Resource/Org Key & Object Code _____ Amount: _____

_____ Amount: _____

Principal Signature: _____

School Site Financial Analyst Signature: _____

~~CSSS Department Signature:~~

OUSD 2017-18 Budget Development Guide



Service Agreement Form AFRICAN AMERICAN MALE ACHEIVEMENT (Object 5733)

"Caring for student health in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: Program to accelerate the achievement of African American Male students in all facets.
The ultimate purposes to create learning conditions engage, encourage and empower African American Male students

CONTACT: Christopher Chatmon, Deputy Chief of Equity, phone number 510-287-8313

FUNDING OPTIONS: Schools may use General Purpose (GP) or Discretionary and/or Concentration funds to fund African American Male Achievement direct services.

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase African American Male Achievement.

- | | |
|--------------------------|---|
| ☐ | AAMA Facilitator: (0.25 FTE)
Price: \$23,091 Resource: _____ Org Key: _____ |
| ☐ | AAMA Facilitator: (0.50 FTE)
Price: \$46,182 Resource: _____ Org Key: _____ |
| ☐ | AAMA Facilitator: (0.75FTE)
Price: \$69,273 Resource: _____ Org Key: _____ |
| ☐ | AAMA Facilitator: (1.0 FTE)
Price: \$92,364 Resource: _____ Org Key: _____ |
-

TRACKING INFORMATION:

Principal Signature:

School Site Financial Analyst Signature:

Deputy Chief/AAMA Director:



Health Services (Object 5735)

"Caring for student health in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: Health Services provides a variety of medical support services directed at maintaining overall student health. These services include screening for vision and hearing, providing diabetes support, and acting as a part or full time school nurse for your school site.

CONTACT: Barbara Parker, Director of Health Services. Barbara.Parker@ousd.org (x2357)

FUNDING OPTIONS: Schools may use Base Discretionary, Concentration and/or Supplemental dollars, or Title I funding source to pay for health services. Nurses paid from Title I funding can only provide supplemental services over and above the state mandated minimum, which must still be provided by a GP funded nurse.

SERVICE OPTIONS:

0 Yes! I would like to purchase additional nursing services, above and beyond the mandated minimum coverage already provided by the central office.

0 School Nurse: %DayEachWeek(0.1FTE)
Price: \$10,437 Resource: Org Key: _____

0 School Nurse: 1DayEach Week(0.2FTE)
Price: \$20,875 Resource: Org Key: _____

0 School Nurse: 1 "hDays EachWeek (0.3 FTE)
Price: \$31,312 Resource: Org Key: _____

0 School Nurse: 2DaysEach Week(0.4FTE)
Price: \$41,750 Resource: Org Key: _____

0 School Nurse: 2% Days Each Week (0.5 FTE)
Price: \$52,187 Resource: Org Key: _____

0 School Nurse: 3DaysEachWeek(0.6FTE)
Price: \$62,624 Resource: Org Key: _____

0 School Nurse: 3% Days Each Week (0.7 FTE)
Price: \$73,062 Resource: Org Key: _____

0 School Nurse: 4DaysEach Week(0.8FTE).
Price: \$83,500 Resource: Org Key: _____

0 School Nurse: 4% Days Each Week (0.9 FTE)
Price: \$93,937 Resource: Org Key: _____

0 School Nurse: 5 Days Each Week (1.0 FTE)
Price: \$104,374 Resource: Org Key: _____

TRACKING INFORMATION:

Principal Signature:

Network Signature:

Financial Analyst Signature:

Health Srvs Signature:



Service Agreement Form

Community School Program Manager (Object 5730)

"Optimizing the educational environment in support of academic achievement"

School:

Site Number:

Principal:

OVERVIEW: Community School Program Managers coordinate and align Community School services to reduce barriers to learning. Responsibilities may include: increasing school attendance leading Coordination of Service Team (COST), supporting culture climate, managing effective partnerships, supporting school outreach and transitions, increasing access to health services, supporting Family Engagement and supervising Classified Staff to support school priorities.

CONTACT: Ali Metzler, Community School Leadership Coordinator (ali.metzler@ousd.org)

FUNDING OPTIONS: Schools may use General Purpose (GP), Title 1, Discretionary and/or Concentration funds to fund Community School Services.

SERVICE OPTIONS:

☐ Yes, I am interested in purchasing the services of a Community School Program Manager for the 2017-18 school year.

☐ **1.0 FTE Standard Service Package**

Charge: \$125,164

Object Code: 5730. Resource: _____ Org Key _____

☐ **1.0 FTE Community School Funding Service Package**

This option utilizes CSSS grant funding and is only available to sites that meet the grant criteria and have been pre-approved via the CSSS Community School Application process

☐ \$62,500 - 1.0 FTE

☐ \$31,500 - .5 FTE

Object Code: 5730. Resource: _____ Org Key _____

Principal Signature: _____

School Site Financial Analyst Signature: _____

OUUSD 2017-2018 CSSS Department Signature: _____ 1





ALLOWABLE EXPENSE TABLES

**2017-18 Guidelines for School Site Level Investments with
Local Control Funding Formula (LCFF) Supplemental and Concentration (S & C) Funds**



LCFF Supplemental(0002) & Concentration(0003) funds are to be used to improve outcomes of English Learners, Foster Youth, and Low Income Students. This year, OUSD school S & C funds need to target one of three action areas within the LCAP:

- English Language Learner Support (LCAP Goal 4)
- Reading Acceleration (LCAP Goal 3) and/or
- Social Emotional Learning (LCAP Goal 2)

Important: If a site would like to fund a support or program that is not listed in the Guidelines, there is a S & C Approval process. Click here for a description of the process.

S & C DOLLARS

MUST BE SPENT IN THE FOLLOWING 3 AREAS ONLY:

ALLOWABLE

English Language Learner Support

Staff in Support of ELLs:

- Class size reduction

(LCAP Action Area 2.7)

- ELL-focused CCTL

(LCAP Action Area 3.2)

- Academic mentors / instructional assistants

(LCAP Action Area 4.3)

- Bilingual teacher recruitment

(LCAP Action Area 2.4)

- Stipends for ELL focused Teacher Leader, ELL Ambassador, or LTEL Ambassador

(LCAP Action Area 4.1)

Extended Learning for ELLs

- Summer school focused on language development

(LCAP Action Area 1.5)

- After/before school enrichment with a language focus

(LCAP Action Area 1.6)

Supplementary Materials for ELLs

- [Supplementary ELD materials & instructional technology](#)

(LCAP Action Area 3.1)

- Classroom library/ leveled books in English and home language

(LCAP Action Area 2.3)

- Imagine Learning licenses

(LCAP Action Area 3.1)

Language Program courses and program design (Dual Language, Newcomer, Long Term



English Language Learner)

(LCAP Action Area 4.2 or 4.3)

- language program design
- heritage language classes
- LTEL Classes
- Balancing class size to maintain bilingual/Dual Language program model

ELL Family Engagement

(LCAP Action Area 3.3)

- Parent education and engagement
- Translation
- SELLS (Site ELL Subcommittee) support

Professional Learning in Support of ELLs

(LCAP Action Area 4.4)

- Stipends or substitutes to support professional learning (e.g. a teacher-led inquiry group or peer observations)
- Stipends to support instructional planning
- Conferences in support of ELL achievement

II. Literacy (Academic Acceleration)

Tier 1 (first instruction for all)

- High-interest/culturally-relevant books or e-books for Leveled Classroom libraries

(LCAP Action area 2.3)

- Books for classroom library collection and book sets for small group guided reading and literature circles

(LCAP Action area 2.3)

- Funding for Library Staffing (Library/Media Teacher and/or Library Tech position)

(LCAP Action area 3.2)

- Family engagement, incentives, and awards focused on Reading campaigns and achievement

(LCAP Action area 3.3)

Tier 2 (targeted small groups)

- Reading Assessment and Program for Struggling Readers and materials (e.g. Leveled Literacy Intervention and Fountas and Pinnell BAS Kits and SIPPs), training and/or FTE for CCTL or Intervention Teacher.

(LCAP Action area 3.2)



- Extended day/enrichment for struggling readers to receive small group acceleration

(LCAP Action area 3.2)

- ECCTL (Early Literacy Common Core Teacher Leader focused on TK-1 Literacy)

(LCAP Action area 3.2)

Similar Tier 1 and Tier 2 strategies can be supported by S&C dollars to focus on **Mathematics** and **Science** learning. These include:

- Professional learning activities and student accelerations/interventions by CCTLs;

(LCAP Action Area 3.4)

- Supplementary and intervention instructional materials;

(LCAP Action Area 2.3)

- Extended Day and enrichment activities;

(LCAP Action Area 1.6)

- Family engagement activities, incentives, and awards.

(LCAP Action Area 6.5)

III. Social Emotional Learning

Mills Teacher Scholar Academic/SEL Inquiry Group (K-12)

- Teacher stipends
- 3 substitute days
- Coaching from Mills

(LCAP Action area 2.2)

High Schools:

- **Engaging Schools** curriculum with professional learning and on-site coaching available from Engaging Schools.

(LCAP Action area 2.3)

Middle School:

- **Expeditionary Learning** (current ELA/SEL curriculum) additional SEL coaching and professional learning options available from Expeditionary Learning.

(LCAP Action area 2.2)

- **Caring School Community** Advisory Curriculum available through Center for the Collaborative Classroom.

(LCAP Action area 2.2)

Elementary School:

- **Caring School Community 2nd edition**

Available through Center for the Collaborative Classroom

(LCAP Action area 2.2)



IV. Supporting Students

Counselors: PSAC “high priority” recommendation: Schools will prioritize funding of additional counselors to achieve target of 100 students to every one counselor (100:1). (LCAP Action Area 1.3)

Restorative Justice Facilitator: Facilitates Restorative Practices for youth and adults with a focus on Tier 1 School-wide supports. (LCAP Action Area 5.2)

Student Advisor (TSA)

TSA position to support student engagement, student voice, and decision making. The Student Advisor will receive support from CSSS as part of the Student Engagement Efforts.

(LCAP Action Area 5.1)

[DRAFT Student Advisor Job description](#)

Common Core Teacher Leader (TSA)

In 2017-18, the primary goals of the Common Core Teacher Leader (CCTL) position are to raise student achievement dramatically in a specific site-selected content area.

(LCAP Action Area 1.3)

[Roles & Responsibilities Guide](#)

LCFF Supplemental & Concentration DOLLARS
NOT ALLOWABLE



1. Assistant Principals
2. Clerical Positions
3. Copier/Xerox contract
4. Noon Duty
5. Meals
6. Medical supplies
7. Table Cloths
8. Contract for xerox machine
9. T-shirts, pullover hooded sweatshirts
10. Postage stamps
11. Toner ink for printers
12. Batteries
13. Refreshments
14. General school supplies - only if linked directly to student engagement and learning can these funds be used
15. Network Tech – unless working directly with students on intervention programs/activities
16. Desks
17. Furniture
18. Rugs/carpet
19. Walkie Talkies
20. Xerox paper



Measure N Permissible Expenses

The Purpose of Measure N

The Oakland College & Career Readiness For All Act is established to pay for the implementation of a comprehensive approach to high school education in Oakland that integrates challenging academics with career-based learning and real-world work experiences. **This comprehensive approach creates small learning communities of career-oriented pathways**, and offers intensive, individualized support to create the conditions for all students to graduate high school prepared to succeed in college and career.

The Goals of Measure N

- Decrease the high school dropout rate
- Increase the high school graduation rate
- Increase high school students' readiness to succeed in college and career
- Increase middle school students' successful transition to high school
- Reduce disparities in student achievement and student access to career pathways based on race, ethnicity, gender, socioeconomic status, English Learner-status, special needs status, and residency

Permissible Uses of Measure N

Measure N proceeds shall be spent on the following school programs:

- To increase support for students in college preparatory courses in every high school to ensure students are qualified for admission to the University of California and other 4-year university systems, and are prepared to succeed in college
- To provide work-based learning in every high school, including career exploration, career technical education courses, job shadowing, internships, and job certifications
- To reduce the drop-out rate by providing counseling, tutoring, mentoring and other intensive support services to students in danger of not graduating high school
- To provide programs to students transitioning from 8th to 9th grade to prepare them to succeed in high school, and to students transitioning from 12th grade to college prepare them for admission and success in college

In order to expend Measure N funds, the expenditures must meet the 5 criteria below:

1. Be Incorporated in the Measure N Education Improvement Plan that was passed by the Measure N Commission and the OUSD Governing Board.
2. Align to the purpose of the Measure N Initiative outlined above.
3. Logically lead to the Measure N Outcome Goals
4. Be aligned to the permissible uses outlined above.
5. Not supplant existing programs, positions, or expenditures at the school site that were previously supporting the Measure N Goals and Outcomes.

OUSD High Schools Only: Please reference [Proper Justification for Measure N IFAS Requests](#) for examples of justification required when using Measure N funds.



Examples of Permissible Expenses

Planning Grant	Education Improvement Plan (SPSA)
● School Site Visits ● Teacher stipends for planning or implementation of pilot programs ● Stipends for student alumni to participate in planning process ● Stipends for parents ● Pilot programs that promote increased outcomes and may be cornerstones for pathway development ● Planning meetings to address new designs or inquiry	Salaries: ● Teachers salaries for shifts in academic program to provide more support, or acceleration. Benefits: ● Benefits associated with staffing positions outlined above Stipends: ● Teacher stipends ● Stipends for student alumni ● Stipends for parents Staff: ● Student support positions and salaries associated with the accelerations ● Consultants to build out programmatic elements to support career pathways Programs and Support Services: ● Pilot programs that promote increased outcomes that meet the goals of Measure N ● 9th grade summer bridge and support programs ● Other innovative programs that have a proven track record of academic improvement ● Support services for specific student populations that improve their academic outcomes ● Dual enrollment courses and books ● Intervention strategies ● Field trips that are essential to the pathway program of study, CTE courses, project-based learning, etc. Deeper Learning Opportunities: ● Professional development ● Conferences ● School Site Visits ● Meetings ● Supplies and materials



Important Information regarding All Permissible Expenses:

Supplementing vs. Supplanting

Funds from Measure N must be used to supplement (increase the level of services) and not supplant (replace) funds from any sources. Any program activity required by state law, State Board of Education (SBOE) rules, or local board policy may not be paid with these funds. State or local funds may not be decreased or diverted for other uses merely because of the availability of these funds. District and campus personnel must maintain documentation that clearly demonstrates the supplementary nature of these funds.

The supplement, not supplant provision is intended to ensure that services provided under Measure N are in addition to, and not in place of, services that would otherwise be provided to participating students with state and local funds if Measure N funds were not available. In addition, funds can not be used to cover the expenses of programmatic elements, staff salary, and costs that were previously being funded by the school. For example, if a site was providing counseling services through a college access partners in the baseline year, you could not shift that expense over to Measure N in the following year. This would be considered supplanting and is not allowed under the Measure.

Information regarding the Conditions for All Permissible Expenses:

Planning Grant

Expenditures must have a clear connection to the planning process, must support design work that creates the conditions for whole school improvement through career-oriented pathway development and must support the development of a clear logical thru line that will become evident in the Education Improvement Plan (SPSA) that is finalized at the end of the planning year.

Education Improvement Plan (SPSA)

Expenditures must be clearly support and come from the logical thru line that is evident in the Education Improvement Plan (SPSA).

Expenditures should support the Theory of Action, should address the Root Cause Analysis, and should ensure the implementation of the Strategies in order to meet the Goals of your SPSA.

Expenditures should support and align to specific parts of your SPSA to support students and pathway development.

Information regarding the Conditions for Specific Permissible Expenses:

School Site Visits

Although school site visits are an allowable expense, schools that are interested in using Measure N funds for school site visits must ensure that school site visits are for teams to learn about best practices or potential planning activities for student supports, student engagement for specific target populations, specific pathway interest, etc. School site visits must support the deeper learning to better address root causes and challenges.

Teacher Stipends

Teacher stipends are an allowable expense and can be allocated for teachers who are tasked with responsibilities such as developing pathway curriculum, collaboration time, piloting programs and/or student support services, etc. Although teacher stipends are an allowable expense, the *key criteria* is that these tasks and activities must be different than what has been offered before and must provide deeper learning to better address root causes, challenges, the development of the pathway instructional core, and overall pathway development.



Meetings

Providing refreshments and stipends for meetings are allowable expenses and can be allocated for meetings that support developing pathway curriculum, collaboration time, student and family engagement, industry partner engagement, etc. Although refreshments and stipends for meetings are an allowable expense, the key criteria is that these meetings must provide deeper learning and planning to better address root causes, challenges, the development of the pathway instructional core, development of pathway program of study, and overall pathway development. These meetings should be be agendized and have recorded minutes.

Professional Development and Conferences

Measure N funds can be used to support the travel, lodging, and fees for school leadership and staff to attend conferences and other opportunities for professional development. Although this is an allowable expense, the key criteria is that conferences and professional development opportunities attended must be different than what has been offered before and must provide deeper learning to better address root causes, challenges, the strategies being implemented, the development of the pathway instructional core, and overall pathway development.

Fieldtrips

Field Trips are an allowable expense and can be allocated for field trips that support pathway curriculum and projects, project-based learning, pre-pathway exposure, work-based learning, CTE courses and coursework, etc. Funds can be used to cover buses, entrance fees, etc. Although field trips are an allowable expense, the key criteria is that these field trips must be different than what has been offered before and must provide deeper learning to better support the development of the pathway instructional core and contextualized learning for students.

Supplies and Materials

Supplies and materials are an allowable expense and can be allocated for supplies and materials needed for project-based learning, pathway curriculum and projects, CTE courses and coursework, Dual Enrollment courses, advisory, 9th grade summer bridge, etc. Although supplies and materials are allowable expenses, the key criteria is that these supplies and materials must be for opportunities that are different than what has been offered before and must provide deeper learning to better support the development of the pathway instructional core and contextualized learning for students.



Guidelines for Teacher Retention and Middle School Improvement Act (Measure G1)

Measure G1 – Allowable and Unallowable Expenses:

Important note: G1 funds should be used to supplement, not supplant additional services, staff, programs or materials the site would not otherwise have within the following goal areas:

Goals	Allowable Expenses (some examples of expenses)
Increase access to courses in arts, music, and world languages in grades 6-8	Staff (art, music, world language) Instruments Art supplies Language software and teaching aids Professional development
Improve student retention during the transition from elementary to middle school.	Staffing and other resources that will not supplant pre-existing services
Create a more positive and safe middle-school learning environment.	Staffing and other resources that will not supplant pre-existing services

Unallowable Expenses:

- Core Classroom teachers (except art, music, or world language class)
- Clerical Positions
- Copier Contract
- Medical Supplies
- Meals

NOTE: Pre-existing services, programs, staff or materials that meet the Measure G1 goals above are NOT allowable expenses. *The exception being if a site can demonstrate that funds used for a pre-existing program have been eliminated through budget allocation reductions and that no alternative funding source exists.*

Proposal Process Timeline:

Measure G1 allocations presented with 1-pagers (for planning)	February 10, 2017
Measure G1 self-assessment for each of the goal categories	February 10-28, 2017
MS Sites (including any site with a 6-8 grade configuration) develop Measure G1 grant proposals	February 10-28, 2017
Measure G1 Commission establishment by Board of Education	February 22, 2017



Submit Measure G1 grant proposals Network team for approval prior to Lock-in Session	February 28, 2017
Sites include recommended G1 Grant proposal expenditures in BDT during lock-in sessions	March 1 – 13, 2017
Site Grant proposals presentation to Measure G1 Commission	April 17 - 21, 2017
G1 Commission notifies MS Network of proposals being recommended to Board	May 5, 2017
Approved Measure G1 grant funding loaded in site budgets	July 1, 2017

Sites must complete a diagnostic self-assessment of the school's curricular and safety needs, including an assessment of community demand for arts, music, and language education.

Use of G1 funds should prioritize gaps in the categories identified as a result of the self-assessment.

The following types of data will need to be provided as evidence along with the proposal for services and programs:

Art - Self assessment

Music - Self assessment

World Language - Self assessment

Elementary to Middle School retention - Enrollment data and analysis

Safe and Positive School Culture - Culture SPF data: URF, Suspensions, CHKS

Decisions to eliminate funding for existing services, staff, programs or materials in order use Measure G1 funds is considered supplanting and are not allowable.

- During Lock-in session your FA will load your proposed 2017-18 Measure G1 budget into the Budget Development Tool and lock-in with the proposed budget;
- Measure G1 Commission will review grants proposals and make a recommendation to the Board for approval;
- IF APPROVED: Proposed Measure G1 budget will be locked-in and adopted in the 2017-18 budget.
- IF NOT APPROVED: Measure G1 budgets will be reallocated to surplus (4399) and adopted in the 2017-18 budget. Adjustment to the Measure G1 budget will not be allowed in 2017-18 until after the Measure G1 Commission approves the site's grant proposal.

If you have additional questions please contact Mark Triplett mark.triplett@ousd.org or Linda Pulido-Esquivel linda.esquivel@ousd.org.



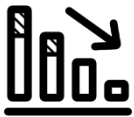
Call for Quality Schools Funds 2017-18

NOTE: These funds are not for ongoing operational school expenses, including general supplies, contracts or activities not directly related to this initiative. Funds must be used for approved expenses. Funds may not be transferred across programs. Funds must be expended by June 30, 2018. Call for Quality Schools funding is not included within Budget 1-Pagers, but is instead allocated following a thorough allocation of base, supplemental, concentration, and relevant measure dollars, to ensure these funds are not supplanting ongoing dollars.

In a continued effort to support quality school development, we are investing in supporting strategic school leaders and their school communities to pursue strategies to build programs that truly meet the diverse needs of our Oakland students and families. To this end, and in accordance with Board policy 6005 Quality School Development, the district has allocated funds to Intensive Support Schools and for other identified highest-need schools. These funds are intended to expand the capacity to support schools aligned to School Performance, School Site Planning, and addressing persistent underperformance and school design challenges.

These funds are explicitly meant ONLY for activities related to the different stages of continuous school improvement and school transformation:

- Assess Context, Program, and School Performance (including SPF)
- Conduct School Quality Review (SQR)
- Community Outreach and Engagement
- Building Capacity of Instructional Leadership Team (ILT) and Parent Teams
- Exposure to Great Schools
- Visioning & Pre-Planning
- Design Thinking & Cycles of Inquiry
- Transformation Plan
- On-site Transformation/Design Plan Implementation Assistance
- Progress Monitoring of Key Plan Elements
- Accelerated programing and intervention



Funding allocation is contingent on a year-by-year basis. Once selected and the plan is approved, sites receive a per pupil allocation (based ONLY on Final Enrollment Projections), with 100% allocation for the first year, and decreasing allocations each subsequent year up to three years. For this reason, funds should be used to build capacity and supplement, not supplant the core program. In addition, these funds CANNOT be used to replace an Appeal. Schools must plan with the expectation that these funds will not be ongoing.

Schools identified through the *Call for Quality Schools* process in SY 2015-16 and SY 2016-17 have already been identified and notified. Funds must be allocated in accordance with your articulated plan and will be reviewed and approved by your Network Superintendent and the Office of Continuous School Improvement. Schools that were designated as in the Engage & Explore phase for SY 2016-17 and invited to complete a Transformation Plan will receive funding as the plan has been approved.

- Subs - Teacher, Principal



- Travel Expenses
- Translation
- Child care
- Meeting Refreshment
- Extended contract – OUSD staff
- Conference Attendance
- Materials / Curriculum
- Contracted Services Related to Building Capacity of ILT or Transformation/Design Plan
- FTE related to Implementation of Transformation/Design Plan that are **NOT ongoing**

For budget planning advisement, please contact your Network Superintendent or Pablo Villavicencio at pablo.villavicencio@ousd.org.



LOCK-IN SESSION CHECK-LIST



All Principals must have the following check list forms during the budget lock-in session:

- Network Supt. Approval Worksheet
(Position FTE and Non Salaries)
- Proof of School Site Council (SSC) Agenda
- Service Agreement Form (completed)
- Appeal Forms
- Trade Forms
- Budget Development Worksheet
- Staff Roaster or Master Scheduling



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SPSA Tool	Diana Sherman	Diana.sherman@ousd.org

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PROCESS

Appeals	Network Leadership	Network Leadership
Adds/Trades	Network Leadership	Network Leadership
Cost Projections	Financial Analyst	Financial Analyst
Staffing Inquiries	HR Staffing Analyst	HR Staffing Analyst
Strategic Planning	Network Leadership	Network Leadership

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Measure G TDGS Funds	Tamara Arroyo	Tamara.Arroyo@ousd.org
Measure G 1 Funds (Middle Schools)	Mark Triplett	Mark.triplett@ousd.org
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Technology Services	Susan Beltz	Susan.beltz@ousd.org



Oakland Unified School District's 2017-18 Budget Development Guide for Central Site Leaders



"Pathways to Excellence through Effective Budgeting"

March 27, 2017

Version 1.2

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I. MESSAGE FROM OUR SUPERINTENDENT

Dear District Leaders,

I am pleased to share this year's 2017-18 OUSD Budget Guide Handbook (Handbook) with you. Each year, we aim to create a tool that can help ease anxiety that often surrounds budget season. This year, the Handbook includes answers to frequently asked questions and valuable tips and information from Central Office partners who have contributed their knowledge and expertise to make the budgeting process more user friendly for schools.

The 2017-18 Budget Development Kick Off for Central Offices is scheduled to begin **March 20, 2017**. This process provides the opportunity for engagement with stakeholders and the ability to incorporate feedback into the district's budget model. This is an extremely important step whenever possible or required by funding guidelines, such as Title I. This Handbook will guide you through several major funding sources clarifying how to utilize the resources for staffing purposes to:

- Meet the instructional needs of students;
- Articulate programs guidelines with School Site Councils; and
- Comply with Local Control Accountability Plan (LCAP) requirements, Board of Education actions, and schools' priorities.

What's New? This year, the Handbook includes an important new feature allowing us to more easily comply with LCAP coding according to Alameda County of Education and State Department of Education budget guidelines. This budgeting cycle you will be able to allocate funds using LCAP Goals and Action Areas. This budgeting feature has been made possible thanks to a major project lead by several of the Financial Services' departments.

What's Next? Please plan to begin working with your program managers, coordinators and the Office of Accountability and Programs to build and complete budget worksheets prior to attending budgetary consultations with Budget Analysts. The Budget Office Team looks forward to supporting you and working with you throughout the budget development process.

It is extremely important to engage with your SSC regarding your site's entire budget and reflect community input in your final plans. Together, with stakeholder feedback and data-informed decision making we will achieve the strongest and most impactful OUSD budget. I look forward to working with you all to ensure a successful budget development process. Thank you all for your dedication every day and your commitment to excellence as we ensure *Every Student Thrives!*

In Partnership,



Devin Dillon, PhD
Interim Superintendent

II. PURPOSE OF HANDBOOK

The Budget Development Handbook is designed to inform central office leaders on the technical aspects and overall process of Budget Development for 2017-18. Upon a review of this handbook, a central office leader will understand the rules, expectations, flexibilities and timing of the full Budget Development process.

III. Reaching Our District Goals with Site-Based Budgets

To ensure that every Oakland public school student is prepared for success in college, career, and community, we must use all the resources at our disposal and allocate them in a manner that reflects our shared beliefs and supports a common vision for Oakland students. Funding from the State of California comprises the largest resource for the District. In 2013, the California State Legislature adopted the Local Control Funding Formula (LCFF) as the mechanism that determines how the State funds education. Funds are allocated based on our enrollment, with additional allocation of funds based on our enrollment of English Learner, Low-Income, and Foster Youth.

Along with the adoption of LCFF, the State also adopted the requirement that each school district develop a Local Control Accountability Plan (LCAP). The LCAP is a three year accountability plan that requires input from stakeholders to ensure LCFF funds are spent intentionally and strategically for our state and local target populations: Students with Economic Hardship, English Language Learners, Foster Youth, Students with Disabilities, African-American Students, and Latino Students.

During the 2013-14 school year, OUSD engaged over 5,000 staff, parents, community members and students through a process to help develop the initial LCAP, which our Board of Education approved in Spring 2014. The input gained during this ongoing process was used to help inform District funding decisions and shape the objectives, themes and strategies of the Strategic Plan Update. The six major goals of the LCAP, and the indicators that will measure our progress towards those goals are provided in the Appendix. Also provided are the actions that the District has committed to take, through budget allocations, to achieve those goals.

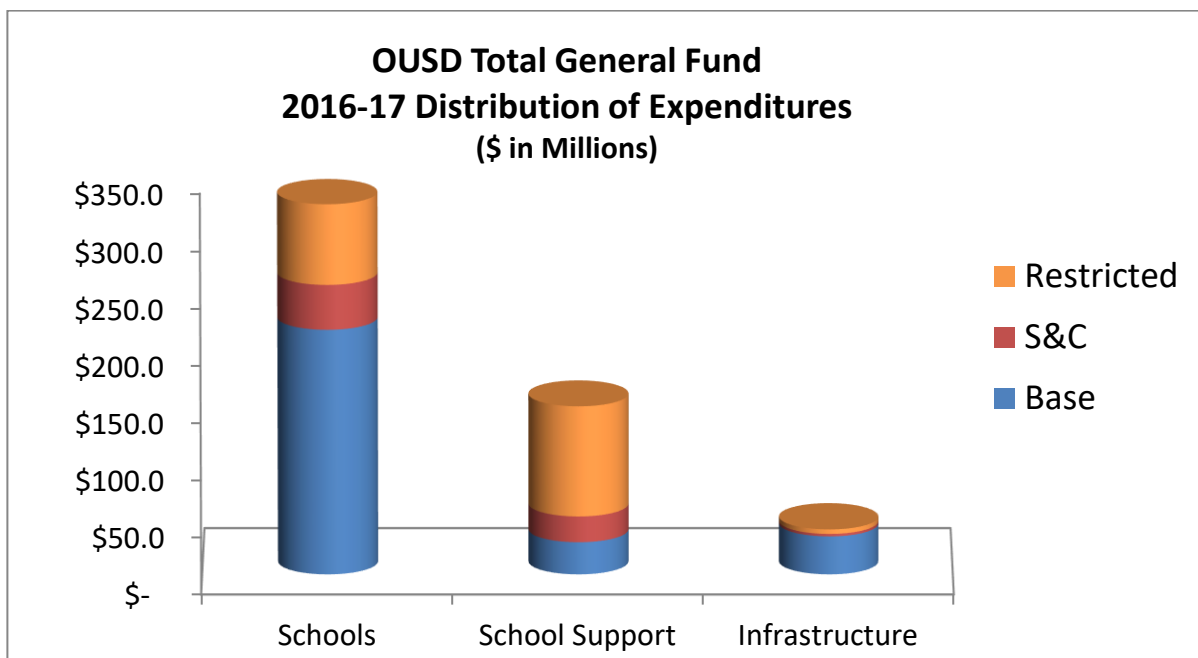
The process of community engagement continued through Board Committee Public Meetings, the PSAC (Parent and Student Advisory Committee), English Language Learner, and Student advisory committees. Each school site has been reaching out to its own community for direction and agreement on school site plans.

The budget process translates the priorities of the Strategic Plan and the LCAP into people, programs and investments that will move us as a District towards the outcomes we've targeted.

The Board of Education established the following principles (articulated in Board Policy 3150) to guide the Oakland Unified School District's annual budgeting process:

1. The allocation and expenditure of OUSD financial resources shall be aligned to the achievement of continuous improvement in school quality and student outcomes.
2. The allocation of OUSD financial resources to schools shall be maximized.
3. The distribution of OUSD financial resources to schools shall account for varying student needs and neighborhood conditions.
4. School governance teams shall be empowered to budget and expend OUSD financial resources.
5. The general public shall have timely access to accurate, comprehensive, and easily comprehensible OUSD financial management information at the school, department, and district-wide levels.

Districts receive these funds based on the number and needs of students attending schools. Resources received are designated in one of several funds (e.g. Cafeteria fund) and categorized based on the funding source as unrestricted or restricted (based on restrictions on use). Except for the General Fund, all other funds are classified as restricted. As of the 2016-17 Adopted Budget, OUSD expected roughly \$520 million in the General Fund.



Implications for OUSD: Enrollment and student attendance are key factors in determining whether OUSD receives all the funds available to serve students from California's Local Control Funding Formula.

- A base allocation for FTE and program based upon service needs.
- Additional base allocations to are a result of Prioritization results
- Supplemental and Concentration allocations based on the programs service to LCFF eligible students (low income, English learners, and foster youth), and must be reflected in the Local Accountability Plan-LCAP

As a department be sure to make budget decisions for 2017-18, resources that are generated by the LCFF target populations should be used to improve outcomes for those students and aligned with the goals and actions in the LCAP.

IV. ABOUT BUDGET DEVELOPMENT IN OUSD

A. What is Budget Development?

Budget Development is the process in which our District formulates its planned budget for the next school year. Each site prepares, reviews, and submits a draft budget for approvals during this process.

At the completion of Budget Development, all site budgets and the overall District budget have been planned in detail and include the number of teachers and other site-based and central office staff for next year, committed expenses for supplies, finalized requests for central services, and funding for any program that will be carried out in our District for the next year.

B. Who Can Participate in Budget Development?

Everyone!

All members of the OUSD community are involved with and contribute to our Budget Development process. That being said, there are leaders and key stakeholder roles that are actively engaged in a routine manner.

Please see below for details on such roles. This list highlights the key groups and how they work together at a high-level to complete the process.

Department Leaders: Department Leaders drive the Budget Development process and are essential representatives for their staff and communities. The District looks to Central Leadership to help implement its overarching priorities through the budgeting process as they will serve and align with their programs' unique needs. Department Leaders are expected to engage in all required steps of the process and seek additional assistance from their Leadership, as needed. Department Leaders should consult with the Office of Accountability Partners on the overall budget, with final approval on the use of Federal (Title) resources. Department Leaders are also responsible for the final submission of their site's budget and will be held accountable if deadlines are missed.

Central Supports: Analysts within Talent and Financial Services, the Partners within the Office of Accountability, and other central office department staff are responsible for being available for questions throughout the Budget Development process. Central supports are accountable for providing accurate information and timely responses.

Central Leadership: Our Senior Leadership Team have been responsible for developing and aligning our allocations with the priorities of the District. The Prioritization Process results provide guidance for base and

supplemental allocations. Our Chief's and Deputies are there to assist by listening to site leaders, engaging in creative problem solving when necessary, and communicating recommendations and approvals in accordance with the overall Budget Development timeline and process. This group is also charged with ensuring individual site plans and budgets are aligned with the District's vision as articulated in the Updated Strategic Plan and LCAP. Central Leadership is accountable to ensure all decisions are made within the designated timeline.

Superintendent: The Superintendent will sign-off on all final budget actions in early March. Assigned Senior Leadership will work on his behalf to recommend and ensure sites build budgets aligned with the Superintendent's vision for the District leading up to his official approval.

School Board/Board of Education: The School Board will vote on the proposed budget and be required to approve the overall Budget in June 2016. They will review to ensure that the proposed actions are aligned with their vision for the District and the LCAP.

C. Where does Budget Development Take Place?

Budget Development session for central offices will be held March 21st -31st on 1000 Broadway, you will be contacted by your Financial Analyst to arrange a time. Specifically, there are a series of face-to-face(lock-in sessions) meetings with department leaders and central office support, program experts and leadership that are key steps for the process.

Additionally, the **Budget Development Tool is the online tool in which the budget is loaded, approved and locked.** Central office leaders will be forwarded a training manual on how to use the web-link on training in this tool is on the District's Intranet. From there, central leaders can use lock-in sessions to utilize the Tool to reflect their approved budget.

The Budget Development Tool will be accessible available on the District Intranet and here: <http://bdt.ousd.org>

D. When is Budget Development?

Budget Development officially begins for the District in September when the Superintendent and Board work together to develop the District's Priorities. From there the remaining of the district begins to priorities their bodies of work and align them with the District Priorities and the LCAP. Overall, the development process spans from September until late March, at which point conversion to the Adoption Budget begins. Key dates, meetings, and hard deadlines are listed below (see two next pages).

Phase & Timing	Events & Deadlines
Phase 1-Planning & Preparation	• Work with Chiefs to align (bundle) bodies of work within the District priorities • Nov 8: Prioritization (Phase 1) • Jan 25: Board approves prioritization results • NEW <i>Jan 17: CDPS-Central Department Projection Spreadsheet released by Academics</i> • Jan 27: Final Prioritization results submitted to Budget Services Division • Feb 3: Final Central Allocations completed (not distributed to sites) • Feb 9: School Allocation worksheets and Handbook distributed • Mar 24: Central Allocation Worksheets and Handbook distributed • Feb 17: Budget Development Tool Open
Phase 2- Decision Making	• Jan 17: COPS (Central Office Projection Worksheet) released An LCAP based worksheet to be completed by all sites prior and during the budget development session. • Feb 17 – Mar 17: Central Office Leadership meets with their staff of Program managers and departmental management to design their 2017-18 Budgets.

Phase & Timing	Events & Deadlines
Phase 3- Final Approvals Meeting & Lock-in	• Feb 17-Mar 31:- Central Leadership can use the budget development tool to align their allocations within the tool. The tool will provide you with the ability to see projected salaries for current staff and project planned changes. • Mar 27-April 7: Central Office Lock-in Sessions are held • Central Leaders, FA's, HR Analyst, Office of Accountability Partners enter all budget plans into the Budget Development Tool & ensure proposed plans balance in the tool • After the completion of the session, all budgets are LCOKED into the system and prepared for Adoption Budget. Changes can be made after July, 1st, 2017.

E. How has Budget Development Changed from Last Year?

As you read through this handbook, you will likely notice there are a quite a few changes from 2016-17.

The ultimate goal of Budget Development remains the same - to solidify site budgets and identify program and staffing needs for the next year - but the process through which we achieve this goal is modified for 2017-2018. We have reflected upon the strengths and challenges of last year's cycle, discussed issues and ideas with school site leaders, central support and leadership, and made changes based upon these exercises and engagements. As a result, we have implemented changes to the following areas: online tool, overall process and handbook, and our allocation formula.

Overall Process & Handbook

In regards to the overall process and handbook, we have redefined the experience in this handbook across three phases for all stakeholders to understand what can be expected of them and the interim goals for each phase. The lock-in and consulting phase will now be held simultaneously with the availability of the Budget Development Tool. In an extension of the newly organized process by three phases, the handbook is also organized as such to allow for ease of comprehension and engagement in the process.

Acknowledging the LCAP requirement and Strategic alignment, Academics has created a new document to assist in the completion of LCAP and the budget requirements for the County. ne Budget has proposed the requirement of this form being completed prior and during the budget development session. Information and training for how to complete this worksheet is found in this handbook.

Budget Tool Snapshot

For the Budget Development Tool, the changes for 2017-2018 include:

- The snapshot for salary projections and staff was taken for the Budget Development Tool in late January. This means that the staff reflected in the tool may have changed or positions may have changed, please update the tool before beginning to allocate your resources. Any unfunded position will be determined to be an eliminated position during adoption.

Resource Allocations

For resource allocation within the Budget Development Tool, the changes for 2017-2018 include:

- Resource 0005 (SUPPLEMENTAL & CONCENTRATION) Due to LCAP reporting requirements central offices that have services that affect Foster Youth, English Language Learners

F. How Can I Expect to Engage in Budget Development?

V. PHASE 1: PLANNING & PREPARATION

A. Orientation to Budget Worksheets

A Central Office Allocation Worksheet is snapshot of the resources that will be made available to a site for the next fiscal year (FY). For FY17-18, the worksheet summary provides a snapshot of your current year FTE and a projection is based upon that and any changes approved during Prioritization. Restricted resources are reflected as the program has defined its distribution.

1. ALLOCATION WORKSHEET

The Allocation Worksheet summarizes the site's overall base and supplemental and concentration budget picture and consists of four main sections.

a. Section 1: BASE AND SUPPLEMENTAL/CONCENTRATION FTE

What you see

	Projected	FY 17/18	
Section 1: Unrestricted (Base/S&C) FTE Info			
Base FTE			
Supplemental & Concentration FTE			
Total FTE			

The first section of the Allocation Worksheet details a site's LCFF funded FTE numbers including the Base (0000) and Supplemental and Concentration (0005) resources.

b. Section 2: Base Unrestricted Dollar allocations

What you see

For a site's **unrestricted base FTE allocations**, the budget worksheet includes the total amount allocated for resource General Purpose Base -0000 and Measure G Base - 0089.

Section 2: Unrestricted BASE Allocation			
Salary & Benefits Projections*			
Non-Salary Projections			
Total Unrestricted Projections			

How it is
calculated

Base Allocations are generated by projections of current year approved FTE (including projected vacancies) **+** current year non-salary allocations (including overtime and stipends) **-/+** Prioritization Results. In accordance with OUSD District Base Funding Budget Policy, a site is not responsible for managing the salary and benefits costs of these FTEs and any unfilled positions or vacancies will not result in vacancy savings to site budgets.

c. Section 3: Supplemental and Concentration Dollar Allocations

What you see

For a site's **Supplemental and Concentration Allocations**, the budget worksheet includes the total amount allocated for resource 0005. These expenditures must be directed towards the population of students outlined in the LCAP. The Central Department Projection Spreadsheet must include these expenditures.

Section 3: Unrestricted Supplemental/Concentration Allocation			
Salary & Benefits Projections*			
Non-Salary Projections			
Total S&C Projections			

d. Section 4: Restricted Projections

Restricted allocations are reflected as either the Board approved document or Program Manager defines.

What you see

Section 4: Restricted Allocation			
3010 - Title I	0	9225 - Kaiser	0
4035 - Title II	0	9333- Measure N	0
8150 - RRMA	0	9217 - Office Max	0

- Any pre-carryover requests must be submitted by form of a Budget Modification Form (see appendices Page 30), analyzed by the Accounting Department before it is approved and placed into the Budget Development Tool for allocation. Please work with your Financial Analyst to submit your request.

2. INTRA/INTER PROGRAM SERVICES

These services below are offered to sites as a INTER (within the General Fund) or INTRA (from one fund to another such as 13(Nutrition Services, 11(Early Childhood),and 12(Adult Education)).

Expense allocations reserved in these object codes build the budget to these sites. Therefore, once a budget is placed within a 5700 object code, it is only under the approval of that program leadership that the Budget Department is allowed to remove the funds.

For additional Purchase	Services Available	Site Funded Object Code	Centrally Funded Object Code
	Counselors	5732	5703
	Custodians	5721	5701
	SSOs	5741	5704
	Nurses	5735	5705
	Psychologists	5734	5702
	Tech Services	5737/FTE	
	Budget Partner		5746
	HR Partner	5757	5747
	School Improvement Coaches		5755
	Pathway Coaches		5708
	Regional Athletic Managers		5709

Central Services for Purchase

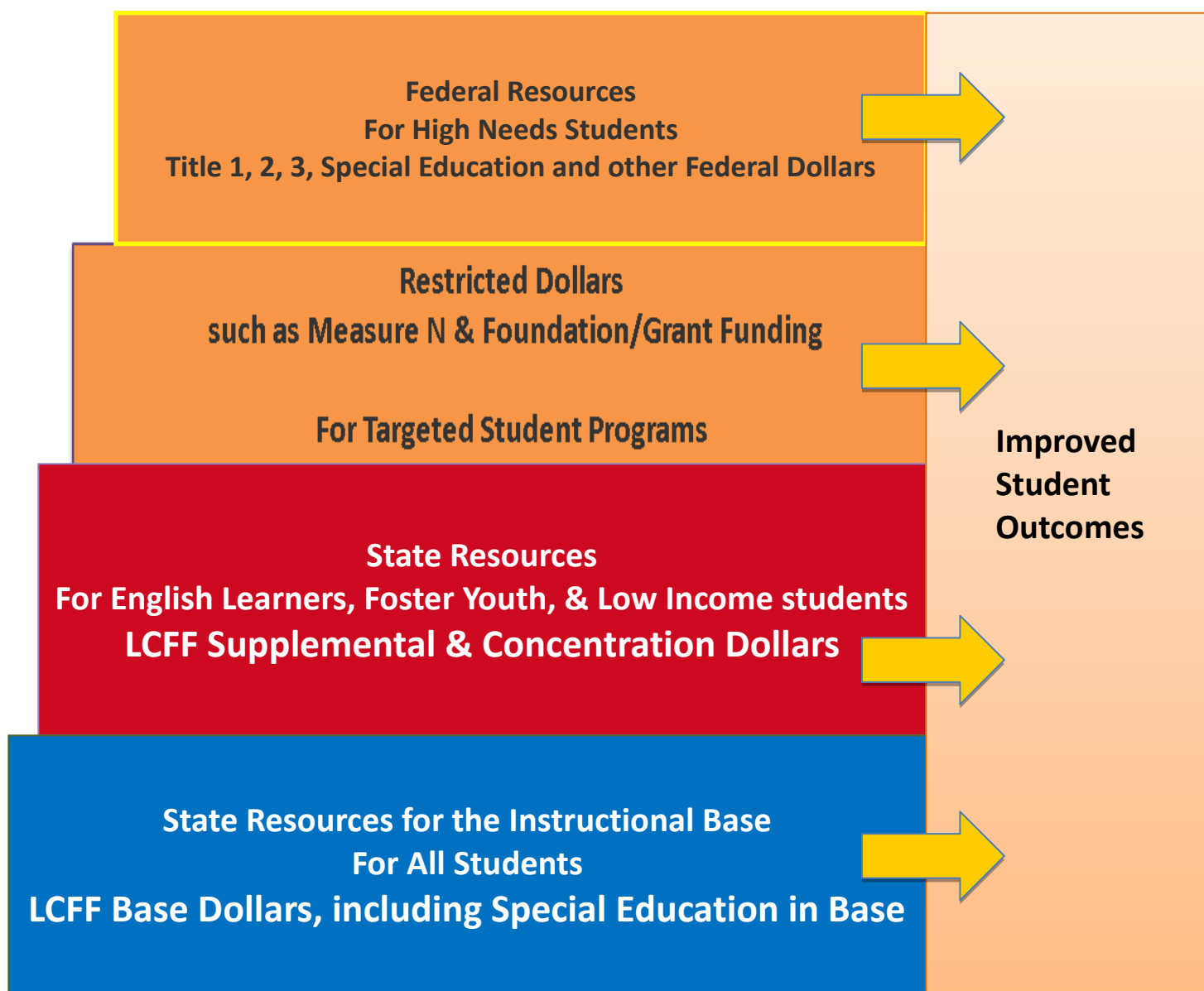
Service	Site based Object Code
Manhood Development Program Facilitator	5733
Mental Health Provider Intern	5739
Restorative Justice Coordinator	5736
Duplication	5716
Mail Services	5724
Adult & Career Education	5751

Instructions on how to manage and monitor the budgets for these services are provided within this handbook (see page X)



3. 2017-18 Color of Money Improving Students Outcomes

Below is a chart of the types of money that flows through OUSD



- *LCFF was designed to direct resources to those students who need them the most.*
- *A “Base” level of funding is provided per pupil, with differentiation for grade.*
- *Additional resources are provided for students who are low income, English learners, and foster youth.*

Unrestricted Base Funds

The **Unrestricted base funding amounts** are calculated for central departments based on their current year projected FTE, a rollover of the programmatic budget (objects 4000-6000's/ plus stipends) and any adjustments deemed necessary by the results from the Prioritization Process. These are dependable and guaranteed General Purpose funds provided to a department intended to cover the cost of the site's basic operational and other program needs, including but not limited to additional FTEs, supplies, books, contracted services and equipment to support the department. **The usage of non-salary funds should reserve a minimum of 65% for non-salary expenses such as supplies, copier maintenance agreements and so forth.**

Please keep in mind if you are utilizing base non-salary funds to purchase an additional FTE, your budget will not be supplemented with additional funds to support the new staff.

Supplemental & Concentration Funds

Supplemental & Concentration funds are allocated to the District based upon enrollment of students across three LCFF target populations, namely Low-income, English Language Learners (ELL), and Foster Youth.

For 2017-2018, approximately \$66 million in LCFF Supplemental & Concentration funds are being allocated to OUSD, these funds are generated by each enrolled student that is either low-income, English Language Learners (ELL) or foster youth (unduplicated count). The funds are allocated to central departments based upon their programs that directly impact these populations of students.

Title I

The purpose of Title I is to improve instruction in high poverty areas to ensure all students meet high academic standards.

Title I funds can be used to enhance and supplement the existing core program. Title I funds cannot be used to pay for staffing, materials, and/or services that students are required to have as a part of their core educational needs. Please see below for more detailed examples of allowable and non-allowable expenses for Title I. Additionally, all planned expenses for Title I must be officially reviewed, approved, and signed-off by a site's School Site Council (SSC). There are no exceptions to this rule and, as such, SSC engagement must be done in a proactive and meaningful way and align with the overall Budget Development timeline.

ALLOWABLE Expenses:

- Provide extended learning time, e.g. before/after school programs; summer intervention; & pull out focused instruction.
- Instructional materials for extended learning time; supplemental materials.
- Direct services to ensure that students stay in school (nurses, social workers, psychologists, additional counselors, community liaisons).
- Professional Development (PD) for teachers to enable Title I students to meet academic achievement standards.
- Support for PD (extended contracts, paid in-services, overtime, supplemental books, software, and substitutes for PD release time).
- Travel/Conferences (Title I related)

- Light Refreshments at Title I parent events (curriculum and data analysis based – not a social event or SSC meeting).
- Parent involvement activities (presenters, materials, transportation that support parent education to improve academic achievement).
- Supplemental instructional technology
- Field trips and study tours that directly support the core curriculum (no trips to amusement parks – no celebration field trips).

Restricted Grants, Contracts & Cooperative Agreements - Resources vary

Grant, contracts, and cooperative agreements (collectively called “sponsored projects”) are externally –funded activities in which a formal written agreement is entered into by OUSD and a sponsor. This form of revenue requires board approval. To load funds into a site’s budget, confirmation (i.e. letter from donor confirming funding in the upcoming school year or board approval documents) must be submitted to the Budget Office prior to the Budget Development Session.

All request for carry-over funds must be submitted with a budget Modification form and any documentation from the grantor to support your request (see appendix).

VI. PHASE 2: DECISION MAKING

Purpose for the Central Department Planning Spreadsheet (CDPS)

In our effort to align the OUSD budget with our Local Control Accountability Plan (LCAP), every central office department is required to complete the template/spreadsheet that is provided by Lisa Spielman, LCAP Coordinator. The primary goal of is to ensure the completion and approval of a comprehensive LCAP prior to the approval of the Adoption Budget. One result of the 2013 Local Control Funding Formula (LCFF) and the Local Control Accountability Plan (LCAP) is districts need to organize and report District dollars in a different manner.

Districts will now need to organize department’s dollar allocations and the reporting of funding around the LCAP Goals and Action Areas, and therefore, the Budget CDPS has been developed to help central office with this task.

CDPS Complete Before Budget Lock-in Session

The Central Office Projections template/spreadsheet should be used by Department Leaders when they meet with their respective Fiscal Analyst during the Budget Development Lock-in Session.

Deadline for the CDPS

The deadline for completion is the date assigned by Fiscal for your budget development lock-in session. For support with completing the spreadsheet, please contact Lisa.Spielman@ousd.org, LCAP Coordinator.

2017-18 USER GUIDE FOR DEPARTMENTS IN THE LCAP BUDGET - CENTRAL DEPARTMENT PLANNING SPREADSHEET (CDPS)

- Read this User Guide before completing the Budget CDPS
- Print this User Guide Out & Have with You When Completing the Budget CDPS
- There are 2 steps to the budget planning -
First, you need to complete the first step budget spreadsheet tab AND
Second, transfer the information from the first step budget spreadsheet tab to the Budget Central Department Planning Spreadsheet (CDPS). Please work in that order.

Directions:

1. **Go to your Google drive** and do a find for the Central Department Planning Spreadsheet. You will only have access to your department's CDPS.
2. **Pre-planning, use the First Step Budget Planning tab:**
Before you complete the Budget CDPS on the last tab, I am recommending that you complete a spreadsheet that has all information about your department's personnel and non - labor. You would include each FTE and/or non labor as a separate line item. To see an example of a budget line item, go to the 3rd tab of the CDPS. The tab on the bottom of the spreadsheet is called First Step...
3. **Transfer information from the First Step Budget Planning Tab to the last tab called CDPS**
You will need to take your department and/or unit line item budget from the First Step worksheet and transfer the information to the last tab which is identified as CDPS. The CDPS is organized through the LCAP Goal and Action Areas.
4. **Example of CDPS on Fourth tab**
There is an example of a complete Budget CDPS on the Fourth tab. This example is made-up, but provides good examples.
5. **Transferring Information from First Step Tab to CDPS tab - put in appropriate Goal Area**
When you are ready to input the information into the CDPS, find the appropriate goal area. The Goal areas are color coded. If you have some of your budget line items in different goal areas, that is acceptable, just make sure to enter the information in the appropriate Goal area.
6. **Bring the Budget CDPS to the Budget Lock-in Session - Complete BEFORE Budget Lock-in Session**
You or your Deputy Chief/Other department leader must bring the CDPS to Lock-in/Budget Development Session. You or the person at the lock-in session will be entering the financial information while at the Lock-in Session.
7. **Expenditures - use First Step tab to calculate the expenditures**

You do need to complete the funding information for personnel known as FTE

You do need to complete funding information for non-labor budget line items.

Go to the Budget Development Tool on the OUSD Intranet, and you will find department information. If you need help, contact Lisa

Benefits should be calculated at 40% per FTE

8. Column by Column Break Down about completing the CDPS - Also Read the Column Headings as the titles are clear with what information is needed

Column A = Department Name

Pull Down from the Menu in Column A.

Column B = Write the Title of the Position OR Write Non-Labor

One Position Title per Line (See Row 9 on example CDPS, 4th tab)

If not a position, write Non-Labor (See Row 8 on example CDPS, 4th tab)

Column C = Total Number of FTE if applicable

Column D = Name of Person(s) in the Position

First and Last Name must be listed

If 4 people in the same Position, write all of the names of the people. See example on Row 9, 4th tab of the CDPS.

Column E = Detailed Description of the Person's Position or Non-Labor item

Write a description - here are some guiding questions to help with description

1. How does this budget line item impact student achievement and/or social emotional learning.
2. How does this budget line item help meet the goals of the department and/or unit. and /or
3. If operations, then describe position or non-labor in 2 - 4 lines.

Column F = Goal Number

Goal number with language is listed. IF you need to add rows, then please do so above the last line.

Column G = LCAP Action Area

Pull down from the menu. Please think carefully where you want your department's work to show up in the LCAP. LCAP organized by Goal Number and Action Area.

Your Department and/or unit can have different budget action items show up in different Goal and Action Areas.

Pull down from the Menu (click in the cell and the menu will appear), do not write your own action area.

If budget line items are in Goal 1, then only select action areas in 1.1 - 1.6

If budget line items are in Goal 2, then only select action areas in 2.1 - 2.10

If budget line items are in Goal 3, then only select action areas in 3.1 - 3.4

If budget line items are in Goal 4, then only select action areas in 4.1 - 4.4

If budget line items are in Goal 5, then only select action areas in 5.1 - 5.4

If budget line items are in Goal 6, then only select action areas in 6.1 - 6.5

You can only select one action area per line item; we know that some of the line items may fall into 2 action areas; however, you can only select one action area.

Column H = Name of Department Leader

First Name and Last Name

Column I = Name of Unit Leader within Department if appropriate

Examples:

Social Emotional Learning is a unit within Community Schools and Student Services, so Mary Hurley would write her name in this column as she leads the SEL unit within the CSSS.

Literacy is a unit within Teaching & Learning, so Nancy Lai would write her name as she leads the Literacy Unit.

Column J = Scope of Service - Grade Levels

Use the pulldown menu

Column K = Scope of Service - Schools

Use the pulldown menu, Pull down "other" if no specific group.

Column L = Target Groups within Scope of Service

No pull down menu - you will need to type the group or groups:

Foster Youth, English Learners, Low Income, SPED, African American Male (AAM), African American Female (AAF), All Students, Other

If multiple student groups, list all of them.

If no specific student group, then type All Students for the answer.

Column M = Site Number

Write the Site Number.

It is a three digit number.

Column N = Resource

If you do not know the resource, contact your fiscal analyst.

Column O = Program Number

If you do not know the Program Number, contact your fiscal analyst.

Column P = Object Code & Budget Category

Select from the Pull Down Menu:

- 1000 & 3000 - Certificated salaries and Benefits
- 2000 & 3000 - Classified salaries and Benefits
- 4000 - Books & Supplies
- 5000 - Services & Other Operating Expenses

Column Q = Total Cost for This Item

Please include **salary and benefits as one number.**

You do need to complete the funding information for personnel known as FTE

You do need to complete funding information for non-labor budget line items.

Go to the Budget Development Tool on the OUSD Intranet, and you will find department information. If you need help, contact Lisa

Benefits should be calculated at 40% per FTE

Column R = LCFF Base Dollars

How much of the total cost is being paid from Base Dollars?

Column S = LCFF Supplemental & Concentration

How much of the total cost is being paid from Base Dollars?

Column T = Restricted Dollar Amount

How much of the total cost is being paid from Restricted Dollars?

Column U = Name of Restricted Funding Source

List the name(s) of the Restricted Funding Source

Column V = Notes from Budget Lock-in Session

Type in any notes in this field; if follow ups are needed write in this field.

Column W = Budget Development tool for IFAS/Lock-in Session

Was this line item funded in the 2017-18 budget development tool?

Write Yes or No

Column X - Name of Leader and Lock-in Date

Type in the name of the leader at the budget lock-in session
Type in the date of the budget Lock-in session

If you have questions and need help, contact Lisa Spielman. She will provide support in completing the CDPS.

2017-18 USER GUIDE FOR NON-LCAP DEPARTMENTS

NON-LCAP BUDGET - CENTRAL DEPARTMENT PLANNING SPREADSHEET (CDPS)

- Read this User Guide before completing the Budget CDPS
- Print this User Guide Out & Have with You When Completing the Budget CDPS
- There are 2 steps to the budget planning - you need to complete the first step budget spreadsheet AND the Budget Central Department Planning Spreadsheet (CDPS)

Directions:

1. **Go to your Google drive** and do a find for the Central Department Planning Spreadsheet. You will only have access to your department's CDPS.
2. **Pre-planning, use the First Step Budget Planning tab:**
Before you complete the Budget CDPS on the last tab, I am recommending that you complete a spreadsheet that has all information about your department's personnel and non - labor. You would include each FTE and/or non labor as a separate line item. To see an example of a budget line item, go to the 3rd tab of the CDPS. The tab on the bottom of the spreadsheet is called First Step...
3. **Transfer information from the First Step Budget Planning Tab to the last tab called CDPS**
You will need to take your department and/or unit line item budget from the First Step worksheet and transfer the information to the last tab which is identified as CDPS. The CDPS is organized through the LCAP Goal and Action Areas.
4. **Example of CDPS on Fourth tab**
There is an example of a complete Budget CDPS on the Fourth tab. This example is made-up, but provides good examples.
5. **Transferring Information from First Step Tab to CDPS tab - put in appropriate Goal Area**
When you are ready to input the information into the CDPS, find the appropriate goal area. The Goal areas are color coded. If you have some of your budget line items in different goal areas, that is acceptable, just make sure to enter the information in the appropriate Goal area.
6. **Bring the Budget CDPS to the Budget Lock-in Session - Complete BEFORE Budget Lock-in Session**

You or your Deputy Chief/Other department leader must bring the CDPS to Lock-in/Budget Development Session. You or the person at the lock-in session will be entering the financial information while at the Lock-in Session.

7. Expenditures - use First Step tab to calculate the expenditures

You do need to complete the funding information for personnel known as FTE

You do need to complete funding information for non-labor budget line items.

Go to the Budget Development Tool on the OUSD Intranet, and you will find department information for FTEs. If you need help, contact Lisa.

Benefits should be calculated at 40% per FTE

8. Column by Column Break Down about completing the CDPS - Also Read the Column Headings as the titles are clear with what information is needed

Column A = Department Name

Pull Down from the Menu in Column A.

Column B = Write the Title of the Position OR Write Non-Labor

One Position Title per Line (See Row 9 on example CDPS, 4th tab)

If not a position, write Non-Labor (See Row 8 on example CDPS, 4th tab)

Column C = Total Number of FTE if applicable

Column D = Name of Person(s) in the Position

First and Last Name must be listed

If 4 people in the same Position, write all of the names of the people. See example on Row 9, 4th tab of the CDPS.

Column E = Detailed Description of the Person's Position or Non-Labor item

Write a description - here are some guiding questions to help with description

1. How does this budget line item impact student achievement and/or social emotional learning and/or
2. How does this budget line item help meet the goals of the department and/or unit and/or
3. If operational, describe the person's job in 4 - 5 lines.

Column F = Goal Number

Goal number with language is listed. IF you need to add rows, then please do so above the last line. All of the non-LCAP departments information will be in the yellow section of the CDPS.



Column G = Do Not Complete

Column H = Name of Department Leader

First Name and Last Name

Column I = Name of Unit Leader within Department if appropriate

Examples:

Social Emotional Learning is a unit within Community Schools and Student Services, so Mary Hurley would write her name in this column as she leads the SEL unit within the CSSS.

Literacy is a unit within Teaching & Learning, so Nancy Lai would write her name as she leads the Literacy Unit.

Column J = Do not Complete

Column K = Do Not Complete

Column L = Do Not Complete

Column M = Site Number

Write the Site Number.

It is a three digit number.

Column N = Resource

If you do not know the resource, contact your fiscal analyst.

Column O = Program Number

If you do not know the Program Number, contact your fiscal analyst.

Column P = Object Code & Budget Category

Select from the Pull Down Menu:

1000 & 3000 - Certificated salaries and Benefits

2000 & 3000 - Classified salaries and Benefits

4000 - Books & Supplies

5000 - Services & Other Operating Expenses

Column Q = Total Cost for This Item

Please include **salary and benefits as one number.**

You do need to complete the funding information for personnel known as FTE

You do need to complete funding information for non-labor budget line items.

Go to the Budget Development Tool on the OUSD Intranet, and you will find department information for FTEs. If you need help, contact Lisa.

Benefits should be calculated at 40% per FTE

Column R = LCFF Base Dollars

How much of the total cost is being paid from Base Dollars?

Column S = LCFF Supplemental & Concentration

How much of the total cost is being paid from Base Dollars?

Column T = Restricted Dollar Amount

How much of the total cost is being paid from Restricted Dollars?

During Budget Lock-in Session, the fiscal analyst will confirm the total amount from each funding source.

Column U = Name of Restricted Funding Source

List the name(s) of the Restricted Funding Source

Fiscal analyst will confirm the Restricted Funding sources where appropriate

Column V = Notes from Budget Lock-in Session

Type in any notes in this field; if follow ups are needed write in this field.

Column W = Budget Development tool for IFAS/Lock-in Session

Was this line item funded in the 2017-18 budget development tool?

Write Yes or No

Column X - Name of Leader and Lock-in Date

Type in the name of the leader at the budget lock-in session

Type in the date of the budget Lock-in session

VII. PHASE 3: FINAL APPROVALS & LOCK-IN SESSION

A series of face-to-face(lock-in sessions) meetings with department leaders and central office support, program experts and leadership that are key steps for the process will be scheduled with through your Financial Analyst. During this session your budget will be reviewed and locked-in for Adoption Budget.

All Central Department Leaders must have the following check- list forms during the budget lock-in session:

- CDPS – Central Department Planning Spreadsheet
- Service Agreement Forms for centrally provided services (completed)
- PC201 – Staffing Roster
- Requests for new grants or carryover*

**Requests for carryover or new grants must be submitted to the Budget Department at least two days prior to your session to ensure loading into the Tool. A Budget Modification Form and supporting documentation from the Grantor is required)*

APPENDICES TO THE 2017-2018 BUDGET DEVELOPMENT HANDBOOK

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Board Policy 3150

OAKLAND UNIFIED SCHOOL DISTRICT

Board Policy

BP 3150

Business and Non Instructional Operations

Results- Based Budgeting

The Board Policy on Results-Based Budgeting provides policy direction to the Superintendent regarding the Oakland Unified School District's continuous budget development process. The Board Policy on Results-Based Budgeting is directly aligned to and builds upon Board of Education policies on School Governance and Quality School Development.

The Board of Education hereby establishes the following principles to guide the Oakland Unified School District's annual budgeting process:

1. The allocation and expenditure of OUSD financial resources shall be aligned to the achievement of continuous improvement in school quality and student outcomes.
2. The allocation of OUSD financial resources to schools shall be maximized.
3. The distribution of OUSD financial resources to schools shall account for varying student needs and neighborhood conditions.
4. School governance teams shall be empowered to budget and expend OUSD financial resources.
5. The general public shall have timely access to accurate, comprehensive, and easily comprehensible OUSD financial management information at the school, department, and district-wide levels.

Within the context of established OUSD strategic priorities, state and federal regulations, and collective bargaining agreements, the Board of Education hereby establishes its intent to:

1. Adopt three-year district-wide School Quality Improvement goals, benchmarks, and priorities (i.e. Balanced Scorecard, Local Control Accountability Plan) toward which every school and every central administration department is responsible for achieving steady measurable progress.
2. Hold every school responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that enables each school to realize steady measurable progress toward achieving Board-adopted School Quality Improvement goals and growth targets.
3. Hold every central administration department responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that demonstrates how each department is achieving steady measurable progress toward providing the supports each school needs to achieve their School Quality Improvement goals and growth targets.
4. Maximize the allocation of all Unrestricted General Fund revenue (i.e. Local Control Funding Formula – Base, Supplemental, Concentration, and local tax revenue) to schools by:
 - a. First, paying all legally required district-wide obligations (e.g. State Emergency Loan, charter school pass-through payments, audit findings).
 - b. Second, allocating up to 12% of all Unrestricted General Fund revenue to support district-wide central administrative services (e.g. finance, human resources, performance management, instructional services, legal services, district leadership).

c. Third, paying the following services to schools:

1. Special Education
2. Custodial and Buildings & Grounds
3. School Police & School Security Officers
4. School Nurses
5. School Counselors
6. Specified Enrichment Resources (i.e. summer school, music, art)

5. Allocate to schools all remaining Unrestricted General Fund revenue based on the projected student enrollment of each school, including allocating a differential amount of revenue to schools based on the number of students enrolled at each school who:

- a. Are in elementary schools, middle schools, and high schools
- b. Qualify for the Federal Free & Reduced Price Meals Program
- c. Are English Learners
- d. Are in Foster Care
- e. Reside in high-stress neighborhoods

1/15/14

Oakland Unified School District

Budget Modification Request Form Instructions

The Budget Modification Request Form is required for all Central Department funding changes and appeals. The form is to be reviewed and approved by district leadership to ensure fiscal solvency.

To begin the budget modification process please the following sections:

Budget Request Description

Purpose and Rationale of Budget Modification

Budget Modification Supporting Documentation

Detailed Budget Modification Outline

Instructions:

1. *Budget Request Description:* Please provide information regarding the amount of the request and all identified funding to support the appeal.
2. *Purpose and Rationale of Budget Modification:* Please provide a description and/or outline for the budget modification requests. Indicate any programs and/or staffing that will be affected if funding is not received.
3. *Budget Modification Supporting Documentation:* Complete this section if the funding request is based upon a grant award. Indicate the amount, terms and any decisions pending Board approval. Attach all supporting documentation to the Budget Modification Request Form.
4. *Detailed Budget Modification Outline:* Indicate organization keys and object codes outlining the funding distribution. Funds will be loaded based upon the outline provided once the Budget Modification Request Form is approved.

Oakland Unified School District
Budget Modification Request Form
BUDGET DEVELOPMENT 17-18

SITE #:

Step 1: Budget Request Description

Requested by: _____ Date Requested: _____
Program Name: _____ Program Number: _____
Existing Budget: _____ Amt. Requested for Approval: _____

Purpose of Budget Modification: (Please provide a one to two sentence description of the request and indicate whether this is for a new or existing budget. Please attach any back up documentation to the completed form)

Detailed Description of Budget Request:

Please refer to Frequently Used List of Object Codes and Resources on reverse. For new budgets, enter "NEW" in the OrgKey field as in Ex 1 & 2. Existing budgets may have an OrgKey which you would enter as in Ex 3. For labor expenses, please list salary and benefits (estimated at 42% of salary) separately.

	Description of Expense	OrgKey	Object Code	Object	Resource	Amount (\$)
<i>Examples:</i>						
Ex 1	.25 FTE Mgr.	NEW	N/A	Salary	OUSD1	\$10,000
Ex 3	Project Mgr. (6 mo.)	9079401702	5825	Consultants	9173	\$20,000
1.						
2.						
3.						
4.						
Total						\$

Step 2: Administrator (Requestor) Approval

Approved by: _____ Date: _____
(Sponsor/Owner)

(Sponsor/Owner)

Department Leader / Approval

Approved by: _____ Date: _____
(Department Leader)

Frequently Used List of Object Codes and Resources

LABOR OBJECT CODES		NON-LABOR OBJECT CODES	
<u>OBJECT</u>	<u>DESCRIPTION</u>	<u>OBJECT</u>	<u>DESCRIPTION</u>
N/A	SALARY	4100	TEXTBOOKS
N/A	BENEFITS (EST. @ 45% OF SALARY)	4200	BOOKS-OTHER THAN TEXTBOOKS
COMMON RESOURCE CODES		4310	SUPPLIES
0000	GENERAL PURPOSE	4311	MEETING REFRESHMENTS
0089	MEASURE G	5200	TRAVEL AND CONFERENCES
0005	CENTRAL SUPPLEMENTAL	5210	MILEAGE/PERSONAL EXP REIMB
0007	ONE-TIME FUNDS	5220	CONFERENCE EXPENSE
0008	ON-GOING (MAY REVISE) FUNDS	5624	RENTALS - FACILITY
3010	TITLE I	5716	INTERPGM – Printing
4035	TITLE II	5724	INTERPGM - POSTAGE
		5812	ADVERTISING - NON-LEGAL
		5825	CONSULTANTS

Step 3: Leadership Approval

This request is:

- ☐ approved as proposed.
☐ approved with the following modifications/conditions. (See additional comments.)
☐ denied at this time for the following reason(s): (See additional comments.)

Additional Comments:

_____	Date:	_____
Chief		
_____	Date:	_____
Superintendent		
_____	Date:	_____
Senior Business Officer/ Chief Financial Officer		

Step 4: Budget Load & Communication Follow-up

Budget Loaded on _____ by _____.
 Communicated to Administrator on _____ by _____.

DEFINITION:

Record the transfer of cost for services, other than indirect cost, between resources, goals, functions, and/or funds.

Typical transfers of direct cost between functions include services provided or products developed by the Lead Education Agency (LEA), such as maintenance and repair of duplicating, audiovisual, or other equipment, photocopying expenses, field trips, district vehicle use; and information technology expenses.

Oakland Unified School District sponsors a number of Inter (With-In the General Fund) and Intra (Between Funds: i.e General Fund (FD 01) and Food Services Fund(FD 13) program services.

Central Support Sites offering direct services:

- **Custodial Services-** Centrally allocated custodians are provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff
- **Health Services (Nurses)**
- **Community School Program Manager**
- **School Security Officers** – Centrally allocated SSOs are provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **Restorative Justice Coordinators**
- **Counselors-** Centrally-allocated counselors are provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **AAMA Facilitators**
- **Psychologist** Centrally-allocated psychologist will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **Mental Health**
- **Family Literacy**

Other Services: (do not require service agreements)

- Postage (5724) – Fund as needed
- Duplication Services (5716) - Fund as needed
- Food Services(5758) – Fund as needed
- B&G Work Orders (5720) – Fund as needed

CREATING A NEW SERVICE MODEL

Creating a Service Model for OUSD schools and departments should begin in the year prior to implementation to ensure proper introduction .

Please follow the list below

- 1) Determine what service is being offered
 - Full Implementation: Service cost covers FTE salary/benefits and all programmatic cost associated with the functioning of the program (supplies, subs and services)
 - Partial Implementation: Service cost covers FTE only (no programmatic cost)
 - Supplemental Implementation: Service cost pays a portion of the FTE cost. (Usually a grant match or site sharing indicate the use of this type of implementation)
- 2) Design/Cost out your Service Model
 - Discuss with your assigned financial analyst the interest in creating your model. Be sure to outline all cost you would like to reflect in your Service Model.
 - Analyst can provide preliminary projections based upon current year data, projected data for the Budget Year will be updated by the Budget Department during the preparation for Budget Development.
 - **CREATE your SERVICE AGREEMENT FORM**
- 3) **REQUEST A SERVICE MODEL OBJECT CODE (5700)** from Budget, Operations & Reporting Division
- 4) Begin communicating with school sites about your new programs' implementation schedule

MANAGING A SERVICE MODEL

To ensure that the correct charges are reflected for the services your site provides, consult with your assigned Financial Analyst monthly to ensure that the budgets is accurately reflected. Report any changes in the services you provide. Notify your Analyst immediately upon the following changes:

- Request for New Services for a Site
- Termination of Services for a Site
- Realignment of Services being provided

The changes listed above **will** impact your budget and the services you provide. If you are providing a service to a site and the budget department has not been notified, you will not receive the funds required to cover the service and your budget will have to absorb the cost. ALL CHANGES OR REQUEST MUST BE SUBMITTED ON A SERVICE AGREEMENT FORM. ANY SERVICES PROVIDED AFTER THE SCHOOL YEAR HAS BEGAN WILL BE PRORATED.

Service Agreement Form Custodial Services (Object 5721)

“Optimizing the educational environment in support of academic achievement”

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the recommended level of custodial services prior to completing this form. If you would like to appeal your recommended allocation, please complete this form and submit it to your FA.

CONTACT: Roland Broach, Executive Director of B&G. Roland.Broach@ousd.org (x8352)

FUNDING OPTIONS: Schools may use General Purpose (GP) only to fund regular custodial allocations (5721). Prop 49/ASES may fund of up to \$1,500 (5731) to cover custodial overtime expenses during the after-school program. DO NOT USE object code 2220 for after school overtime of the day custodian. Also note that supplies and materials for the after-school program are not included in this amount.

SERVICE OPTIONS:

☐ **Yes!** I agree to the recommended level of service for my site indicated on the Custodial Services Recommended Level of Service Spreadsheet

☐ **No.** I would like to appeal my recommended level of service. I believe that the recommended level of service is not correct for my site for the following reasons:

Appeal Rationale:

Here are the changes I would like to request:

- ☐ **Additional Service**
I wish to increase my service from _____ FTE to _____ FTE
- ☐ **Reduced Service**
I wish to decrease my service from _____ FTE to _____ FTE
(A plan to ensure my site is clean and the OUSD Cleaning Standards are met is **REQUIRED** - OUSD Cleaning Standards are posted on the Site Deliverables and Documents intranet site)
- ☐ **Reduced Square Footage**
Please reduce the square footage that custodial services is required to clean. Reduce my square footage from _____ sq feet to _____ sq feet
- ☐ **Community Cleanup Campaign**
I understand that the custodians assigned to my site will not be asked to clean the following rooms during regular hours.
Summary of plan:
- ☐ **Other Conditions**
I guarantee that the custodians assigned to my site will not be asked to clean the following rooms during regular work hours:

TRACKING INFORMATION:

FTE Total: _____ School Org Key: _____

Principal Signature: _____

Network Deputy/Supt Signature: _____

Financial Analyst Signature: _____

Executive Director, B&G Signature: _____

:

Service Agreement Form School Security Officer (Object 5741)

“Optimizing the educational environment in support of academic achievement”

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the Central Funded SSO allocation prior to completing this form. If you would like to order additional FTE , please complete this form and submit it to your FA.

CONTACT: Jeff Godown, Chief of Police. Jeff.Godown@ousd.org (x3679)

FUNDING OPTIONS: Schools may use Base Discretionary, Concentration and/or Supplemental dollars to fund a School Site Security Officer –SSO in object code (5741). Prop 49/ASES may fund overtime expenses during the after-school program use object code 2225.

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase a School Site Security Officer at the following level of coverage:

- | | | |
|--------------------------|--|----------------|
| ☐ | 1.0 FTE School Site Security Officer
Price: \$61,119 Resource: _____ | Org Key: _____ |
| ☐ | .80 FTE School Site Security Officer
Price: \$48,895 Resource: _____ | Org Key: _____ |
| ☐ | .75 FTE School Site Security Officer
Price: \$45,839 Resource: _____ | Org Key: _____ |
| ☐ | .50 FTE School Site Security Officer
Price: \$30,560 Resource: _____ | Org Key: _____ |
| ☐ | 2.0 FTE School Site Security Officer
Price: \$122,238 Resource: _____ | Org Key: _____ |

TRACKING INFORMATION:

FTE Total:

School Org Key:

Principal Signature:

School Site Financial Associate Signature:

Network Executive Officer Signature:

Police Services Authorization:

ALLOWABLE EXPENSE TABLES

2017-18 Guidelines for School Site Level Investments with Local Control Funding Formula (LCFF) Supplemental and Concentration (S & C) Funds

LCFF Supplemental(0002) & Concentration(0003) funds are to be used to improve outcomes of English Learners, Foster Youth, and Low Income Students. This year, OUSD school S & C funds need to target one of three action areas within the LCAP:

- English Language Learner Support (LCAP Goal 4)
- Reading Acceleration (LCAP Goal 3) and/or
- Social Emotional Learning (LCAP Goal 2)

Important: If a site would like to fund a support or program that is not listed in the Guidelines, there is a S & C Approval process. Click [here](#) for a description of the process.

S & C DOLLARS MUST BE SPENT IN THE FOLLOWING 3 AREAS ONLY: ALLOWABLE	
.English Language Learner Support Staff in Support of ELLs: • Class size reduction (LCAP Action Area 2.7) • ELL-focused CCTL (LCAP Action Area 3.2) • Academic mentors / instructional assistants (LCAP Action Area 4.3) • Bilingual teacher recruitment (LCAP Action Area 2.4) • Stipends for ELL focused Teacher Leader, ELL Ambassador, or LTEL Ambassador (LCAP Action Area 4.1) Extended Learning for ELLs • Summer school focused on language development (LCAP Action Area 1.5) • After/before school enrichment with a language focus (LCAP Action Area 1.6) Supplementary Materials for ELLs • Supplementary ELD materials & instructional technology (LCAP Action Area 3.1) • Classroom library/ leveled books in English and home language (LCAP Action Area 2.3) • Imagine Learning licenses (LCAP Action Area 3.1)	

Language Program courses and program design (Dual Language, Newcomer, Long Term English Language Learner)

(LCAP Action Area 4.2 or 4.3)

- language program design
- heritage language classes
- LTEL Classes
- Balancing class size to maintain bilingual/Dual Language program model

ELL Family Engagement

(LCAP Action Area 3.3)

- Parent education and engagement
- Translation
- SELLS (Site ELL Subcommittee) support

Professional Learning in Support of ELLs

(LCAP Action Area 4.4)

- Stipends or substitutes to support professional learning (e.g. a teacher-led inquiry group or peer observations)
- Stipends to support instructional planning
- Conferences in support of ELL achievement

II. Literacy (Academic Acceleration)

Tier 1 (first instruction for all)

- High-interest/culturally-relevant books or e-books for Leveled Classroom libraries

(LCAP Action area 2.3)

- Books for classroom library collection and book sets for small group guided reading and literature circles

(LCAP Action area 2.3)

- Funding for Library Staffing (Library/Media Teacher and/or Library Tech position)

(LCAP Action area 3.2)

- Family engagement, incentives, and awards focused on Reading campaigns and achievement

(LCAP Action area 3.3)

Tier 2 (targeted small groups)

- Reading Assessment and Program for Struggling Readers and materials (e.g. Leveled Literacy Intervention and Fountas and Pinnell BAS Kits and SIPPs), training and/or FTE for CCTL or Intervention Teacher.

(LCAP Action area 3.2)

- Extended day/enrichment for struggling readers to receive small group acceleration

(LCAP Action area 3.2)

- ECCTL (Early Literacy Common Core Teacher Leader focused on TK-1 Literacy)

(LCAP Action area 3.2)

Similar Tier 1 and Tier 2 strategies can be supported by S&C dollars to focus on **Mathematics** and **Science** learning. These include:

- Professional learning activities and student accelerations/interventions by CCTLs;

(LCAP Action Area 3.4)

- Supplementary and intervention instructional materials;

(LCAP Action Area 2.3)

- Extended Day and enrichment activities;

(LCAP Action Area 1.6)

- Family engagement activities, incentives, and awards.

(LCAP Action Area 6.5)

III. Social Emotional Learning

Mills Teacher Scholar Academic/SEL Inquiry Group (K-12)

- Teacher stipends
- 3 substitute days
- Coaching from Mills

(LCAP Action area 2.2)

High Schools:

- **Engaging Schools** curriculum with professional learning and on-site coaching available from Engaging Schools.

(LCAP Action area 2.3)

Middle School:

- **Expeditionary Learning** (current ELA/SEL curriculum) additional SEL coaching and professional learning options available from Expeditionary Learning.

(LCAP Action area 2.2)

- **Caring School Community** Advisory Curriculum available through Center for the Collaborative Classroom.

(LCAP Action area 2.2)

Elementary School:

- **Caring School Community 2nd edition**

Available through Center for the Collaborative Classroom

(LCAP Action area 2.2)

IV. Supporting Students

Counselors: PSAC “high priority” recommendation: Schools will prioritize funding of additional counselors to achieve target of 100 students to every one counselor (100:1).

(LCAP Action Area 1.3)

Restorative Justice Facilitator: Facilitates Restorative Practices for youth and adults with a focus on Tier 1 School-wide supports.

(LCAP Action Area 5.2)

Student Advisor (TSA)

TSA position to support student engagement, student voice, and decision making. The Student Advisor will receive support from CSSS as part of the Student Engagement Efforts.

(LCAP Action Area 5.1)

[DRAFT Student Advisor Job description](#)

Common Core Teacher Leader (TSA)

In 2017-18, the primary goals of the Common Core Teacher Leader (CCTL) position are to raise student achievement dramatically in a specific site-selected content area.

(LCAP Action Area 1.3)

[Roles & Responsibilities Guide](#)

LCFF Supplemental & Concentration DOLLARS
NOT ALLOWABLE

1. Assistant Principals
2. Clerical Positions
3. Copier/Xerox contract
4. Noon Duty
5. Meals
6. Medical supplies
7. Table Cloths
8. Contract for xerox machine
9. T-shirts, pullover hooded sweatshirts
10. Postage stamps
11. Toner ink for printers
12. Batteries
13. Refreshments
14. General school supplies - only if linked directly to student engagement and learning can these funds be used
15. Network Tech – unless working directly with students on intervention programs/activities
16. Desks
17. Furniture
18. Rugs/carpet
19. Walkie Talkies
20. Xerox paper

Oakland Unified School District's 2017-18 Budget Development Guide for Intensive Pathway Sites



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I. MESSAGE FROM OUR INTERIM SUPERINTENDENT

Dear District Leaders,

I am pleased to share this year's 2017-18 OUSD Budget Guide Handbook (Handbook) with you. Each year, we aim to create a tool that can help ease anxiety that often surrounds budget season. This year, the Handbook includes answers to frequently asked questions and valuable tips and information from Central Office partners who have contributed their knowledge and expertise to make the budgeting process more user friendly for schools.

The 2017-18 Budget Development Kick Off for schools is scheduled to begin **February 10, 2017**. This process provides the opportunity for engagement with stakeholders and the ability to incorporate feedback into the schools' budget model. This is an extremely important step whenever possible or required by funding guidelines, such as Title I. This Handbook will guide you through several major funding sources clarifying how to utilize the resources for staffing purposes to:

- Meet the instructional needs of students;
- Articulate programs guidelines with School Site Councils; and
- Comply with Local Control Accountability Plan (LCAP) requirements, Board of Education actions, and schools' priorities.

What's New? This year, the Handbook includes an important new feature allowing us to more easily comply with LCAP coding according to Alameda County of Education and State Department of Education budget guidelines. This budgeting cycle you will be able to allocate funds using LCAP Goals and Action Areas. This budgeting feature has been made possible thanks to a major project lead by several of the Financial Services' departments.

What's Next? Please plan to begin working with your Network Superintendent, School Site Council (SSC) and the Office of Accountability and Programs to build and complete budget worksheets prior to attending budgetary consultations with Budget Analysts. The Budget Office Team looks forward to supporting you and working with you throughout the budget development process.

It is extremely important to engage with your SSC regarding your site's entire budget and reflect community input in your final plans. Together, with stakeholder feedback and data-informed decision making we will achieve the strongest and most impactful OUSD budget. I look forward to working with you all to ensure a successful budget development process. Thank you all for your dedication every day and your commitment to excellence as we ensure *Every Student Thrives!*

In Partnership,



Devin Dillon, PhD
Interim Superintendent

The Budget Development Handbook is designed to inform school site leaders on the technical aspects and overall process of Budget Development for 2017-18. Upon a review of this handbook, a school site leader will understand the rules, expectations, flexibilities and timing of the full Budget Development process.

Please note supporting materials concerning the academic program guidance will be forthcoming from the Chief of Schools and Network Superintendents.

II. REACHING OUR DISTRICT GOALS WITH SITE-BASED BUDGETS

To ensure that every Oakland public school student is prepared for success in college, career, and community, we must use all the resources at our disposal and allocate them in a manner that reflects our shared beliefs and supports a common vision for Oakland students. Funding from the State of California comprises the largest financial resource for the District. The Local Control Funding Formula (LCFF) is the mechanism that determines how the State funds education. Funds are allocated based on our enrollment, with additional allocation of funds based on our enrollment of English Learner, Low-Income, and Foster Youth.

LCFF funding requires that each school district develop a Local Control Accountability Plan (LCAP). The LCAP is a three year accountability plan that requires input from stakeholders to ensure LCFF funds are spent intentionally and strategically for our targeted populations: Students with Economic Hardship, English Language Learners, Foster Youth, Disabilities, African-American Students, and Latino Students. The six major goals of the LCAP, and the indicators that will measure our progress towards those goals are provided in the Appendix. Also provided are the actions that the District has committed to take, through budget allocations, to achieve those goals.

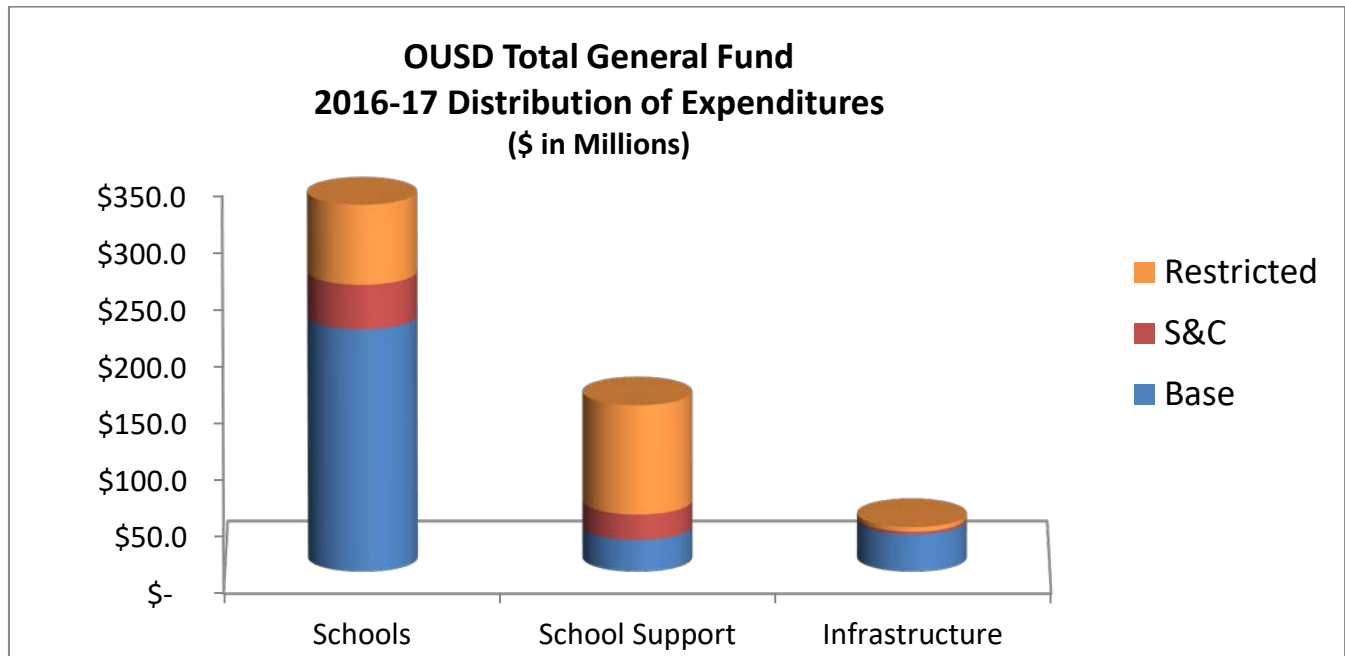
The process of community engagement is ongoing, through the LCAP Parent, English Language Learner, and Student advisory committees. Each school site should be reaching out to its own community for direction and agreement on school site plans.

The budget process translates the principles and priorities of the Strategic Plan and the LCAP into people, programs and investments that will move us as a District towards the outcomes we've targeted.

The Board of Education established the following principles (articulated in Board Policy 3150) to guide the Oakland Unified School District's annual budgeting process:

1. The allocation and expenditure of OUSD financial resources shall be aligned to the achievement of continuous improvement in school quality and student outcomes.
2. The allocation of OUSD financial resources to schools shall be maximized.
3. The distribution of OUSD financial resources to schools shall account for varying student needs and neighborhood conditions.
4. School governance teams shall be empowered to budget and expend OUSD financial resources.
5. The general public shall have timely access to accurate, comprehensive, and easily comprehensible OUSD financial management information at the school, department, and district-wide levels.

The overall allocation of funds according to Board Policy (BP 3150), the LCAP and the Strategic Plan starts with the distribution of unrestricted funds to no more than 12% to fund central or infrastructure activities. The remaining 88% of unrestricted funds are allocated to schools either directly as the allocations to sites or as a centrally provided service.



The allocation of the District's unrestricted funds directly to schools is based on the direction provided by Board Policy #3150 (see Appendix A). It is:

- A base allocation based on enrollment projections by grade
- Additional base allocations to accommodate varying student need
- Supplemental allocations based on LCFF eligible students (low income, English learners, and foster youth), and
- Concentration allocations based on neighborhood factors
- Additional discretionary allocations based on the School Performance Framework (SPF) for each school, to better align resources to the achievement of continuous improvement in school quality and student outcomes.

As school sites make budget decisions for 2017-18, resources that are generated by the LCFF target populations should be used to improve outcomes for those students and aligned with the goals and actions in the LCAP.

III. ABOUT BUDGET DEVELOPMENT IN OUSD

A. What is Budget Development?

Budget Development is the process in which our District formulates its planned budget for the next school year. Each site prepares, reviews, and submits a draft budget for approvals during this process.

At the completion of Budget Development, all site budgets and the overall District budget have been planned in detail and include the number of teachers and other site-based and central office staff for next year, committed expenses for

supplies, finalized requests for central services, and funding for any program that will be carried out in our District for the next year.

B. Who Can Participate in Budget Development?

Everyone!

All members of the OUSD community are involved with and contribute to our Budget Development process. That being said, there are leaders and key stakeholder roles that are actively engaged in a routine manner.

Please see below for details on such roles. This list highlights the key groups and how they work together at a high-level to complete the process.

Principals: School site leaders drive the Budget Development process and are essential representatives for their students and communities. The District looks to Principals to help implement its overarching priorities through the budgeting process as they will serve and align with their students' unique needs. Principals are expected to engage in all required steps of the process and seek additional assistance from central offices, as needed. School Site Councils (SSCs) should be consulted on the overall budget, with final approval on the use of Title I resources. Principals are also responsible for the final submission of their site's budget and will be held accountable if deadlines are missed.

Central Supports: Analysts within Human Resources and Financial Services, the Partners within the Office of Accountability, and other central office department staff are responsible for being available for questions throughout the Budget Development process. Central supports are accountable for providing accurate information and timely responses.

Central Leadership: Our Network Superintendents are responsible for attending consultancies, listening to site leaders, engaging in creative problem solving when necessary, and communicating recommendations and approvals in accordance with the overall Budget Development timeline and process. This group is also charged with ensuring individual site plans and budgets are aligned with the District's vision as articulated in the Updated Strategic Plan and LCAP. Central Leadership is accountable to ensure all decisions are made within the designated timeline.

School Site Council (SSC) & Community at Large: The SSC and community are generally responsible for compiling representative input and communicating values and priorities to school site and district leadership. The SSC must also officially sign off on the use of Title I funds at their site.

Superintendent: The Superintendent will sign-off on all final budget actions in late February. The Chief of Schools and the Network Superintendents will work on his behalf to recommend and ensure sites build budgets aligned with the Superintendent's vision for the District leading up to his official approval.

School Board/Board of Education: The School Board will vote on the proposed budget and be required to approve the overall Budget in June 2017. They will review to ensure that the proposed actions are aligned with their vision for the District and the LCAP.

C. Where does Budget Development Take Place?

Budget Development session for schools will be held **February 28nd – March 13th** for each individual site and for central offices within OUSD. Specifically, there are a series of face-to-face meetings with site leaders and central office support, program experts and leadership that are key steps for the process. These meetings include: Network interface and final budget consultations/lock in sessions.

Additionally, the **Budget Development Tool (BDT)** is the online tool in which the budget is loaded, approved and locked. Site leaders will receive a web-link on training in this tool will be on the District's Intranet on February 17th 2017. From there, site leaders can use lock-in sessions to utilize the Tool to reflect their approved budget.

The Budget Development Tool will be accessible on February 17th and will be made available on the District Intranet and here: <http://bdt.ousd.org>

D. When is Budget Development?

Budget Development officially begins for the District in September when the Superintendent and Board work together to develop the District's Priorities. From there, the remaining of the district begins to priorities their bodies of work and align them with the District Priorities and the LCAP. In Overall, the development process spans from September until late March, at which point conversion to the Adoption Budget begins. Key dates, meetings, and hard deadlines are listed below (see two next pages).



This icon denotes an in-person meeting with Central Office is required.



This icon denotes an in-person meeting with SSC + is required.

Phase & Timing	Events & Deadlines
Phase 1-Planning & Preparation	- Hold 1 SSC Meeting to discuss plans & priorities  Feb 10: Kickoff Meeting for all Site Leaders and Budget Worksheets and Handbook are released  Mid Dec -Jan: Single Plan Student Tool available to sites Feb 17: Budget Development Tool Online Training Available Feb 17: Budget Development Tool Released



Phase 2-Appeals *(Optional)*

Bilingual/Dual Language

A-G Electives

Middle School Electives

- **Feb 10-16:** Principals submit base teacher appeals (if needed) to Network Supt
- **Feb 18-26 :**Network Leadership meets with Principals that submitted an Appeal request 
- **Feb 28:** SPSA Theory of Action Due
- **Feb 28:** Network communicates all final decisions regarding Appeals to Budget Dept.
- **Mar 1-13:** Budget Dept. reflects Appeal decisions in BDT and provides updated worksheets during Lock-in Session
- **Mar 10:** Draft Site Plan for Network Review
- **Mar 24:** Network Review of Site Plan

Phase & Timing

Events & Deadlines

Phase 3- Decision Making & Trades

- *Note:* if SSC meeting does not occur in Phase 3, it must happen within three weeks of Phase 4
- **Feb 28 – Mar 13:** Principals submit requests for base labor trades to Network Supt., HR, and Budget for review & Budget Dept. regenerates budget worksheets & updates Budget Development Tool
- Prior to scheduled Phase 4, principal finalizes all labor and non-labor decisions in preparation for sign-off



- Obtain Approval Sign-offs from HR and Office of Accountability for staffing changes & Title I funding actions
- **EXCEPTIONS FOR SSC SIGN-OFFS**
Schools sites may have SSC meetings scheduled after your Budget Development lock-in session. In order to accommodate your needs, the Budget Department will allow a three-week window from the scheduled lock-in session to validate the approvals from your SSC's. During lock-in session we will allocate your funding as you plan to propose to your SSC and will lock it in place once the SSC approves the budget. If the SSC does not approve the plan within the three-week window, Budget will move the planned funds to object code 4399 (surplus) and will not redistribute until after July 1, 2017.

Phase 4- Final Approvals Meeting & Lock-in

- **Feb 28-Mar 13:-** Principals share final proposed plan to Network Supt, Deputy Network Supt, and Partners from HR, Office of Accountability Partners, and Budget 
 - Principals and FA's enter all budget plans into the Budget Development Tool & ensure proposed plans balance in the tool
 - At the Approvals Meeting, Network Supt. and Principal sign final approval form
- **Mar 31:** All Budget Tools are locked

E.

How has Budget Development Changed from Last Year?

As you read through this handbook, you will likely notice there are a number of changes from 2017-18.

The ultimate goal of Budget Development remains the same - to solidify site budgets and identify program and staffing needs for the next year - but the process through which we achieve this goal is modified for 2017-2018. We have reflected upon the strengths and challenges of last year's cycle, discussed issues and ideas with school site leaders, central support and leadership, and made changes based upon these exercises and engagements. As a result, we have implemented changes to the following areas: online tool, overall process and handbook, and our allocation formula.

1. Overall Process & Handbook

In regards to the overall process and handbook, we have redefined the experience across five phases for all stakeholders to understand what can be expected of them and the interim goals for each phase. The lock-in and consulting phase will now be held simultaneously with the availability of the Budget Development Tool.

Acknowledging the tight timeline and the necessary communications required for schools, Budget has proposed an extension process for the submission of SSC approved documents during the 2017-18 Budget Development process. Of course, we would encourage you to have those discussions before your consulting/lock-in session but for those of you that are unable to meet to get final approval before then, a three week extension will be allowed, subject to the following:

IF YOU CAN PROVIDE US WITH DOCUMENTATION THAT YOU HAVE A SCHEDULED SSC MEETING WITHIN THREE WEEKS FROM YOUR SCHEDULED SESSION, THEN:

- At Consultation/Lock-in session provide your Financial Analyst (FA) with the date that you intend to meet;
- During Consultation/Lock-in session your FA will load your proposed 2017-18 Title I budget into the Budget Development Tool and lock-in with the proposed budget;
- After your SSC meeting, provide documentation to your Office of Accountability Partner that the meeting was held, the budget reviewed, and the Title 1 budget approved by the SSC;
- Budget and Office of Accountability will review outstanding SSC approvals;
- IF APPROVED: Proposed budget will be lock-in and adopted in 2017-18 budget.
- IF NOT APPROVED OR DOCUMENTATION IS NOT SUBMITTED: All Title I budgets will be reallocated to surplus (4399) and adopted in 2017-18 budget. **Adjustment will not be allowed in 2017-18 budgets until mid July 2017.**

2. Picture of Allocation of Resources to Schools

To align with the requirements of LCFF and LCAP, the changes for 2017-2018 include:

- **REQUIRED CODING CHANGES:** During the 2016-17 fiscal year there were programs identified as supplemental within the LCAP that were not coded as such within IFAS. Program Improvement and Call Funds were distributed in resource 0000(General Purpose), programs 1101 and 0107, respectively. In 2017-18 in accordance to the LCAP language these funds will be coded in resource 0002-Supplemental, program 1101 and 0107. Therefore, allocations within resource 0002 will reflect an increase. SSO allocations are also impacted by the LCAP recoding. Object code 5741 will reflect in the supplemental resource within the budget development tool.
- **MEASURE G LIBRARY** funds for library services will not be reflected on the budget worksheets released on February 9th, 2017. The Library Department has implemented a application process for the allocation of funds. Once approved, the Library Department will communicate the approved amount and the allocation will be updated on the budget worksheets and budget development tool (BDT)
- **LATE NEWCOMER (after 20 day) FTE** allocations will be reflected within the supplemental resource 0002, in alignment with the projected 2017-18 LCAP.
- **Call for Quality funds will not be appear on budget worksheets until further notice from the program**

F. How Can I Expect to Engage in Budget Development?

IV. PHASE 1: PLANNING & PREPARATION

A. Orientation to Budget Worksheets

A school site's Budget Worksheets are snapshots of the resources that will be made available to a site for the next fiscal year (FY). For FY17-18, there are a total of 2 worksheet summaries (FTE and the Comparison).

1. FTE WORKSHEET

The FTE Worksheet summarizes the site's overall base budget picture and consists of four main sections.



2017-2018 FTE WORKSHEET						
ALTERNATIVE EDUCATION		17-18 Actual Projection	17-18 Calculated Allocation	DIFFERENCE		
1. ENROLLMENT						
ENROLLMENT						
	Regular Enrollment - Highest Enrollment from Mar 16 - Feb 17	-	-	-	-	
	Inclusion Enrollment (counted in regular enrollment)	-	-	-	-	
	SDC Enrollment	-	-	-	-	
	Newcomers Enrollment (Students Enrolled by 20th day)	-	-	-	-	
TOTAL ENROLLMENT FOR BASE FTE		-	-	-	-	
"Late" Newcomers Enrollment (Projected incoming students after 20th Day)		-	-	-	-	
TOTAL PROJECTED ENROLLMENT		-	-	-	-	
TITLE I %		0.0%	0.0%	0%	0%	
2. SCHOOL SITE BASE UNRESTRICTED FTE'S AND DOLLARS						
CERTIFICATED		Actual Projected FTE	Actual Projected Total Sal/Benes	Calculated FTE	Calc Total Sal/Benes	DIFFERENCE
	Teachers-Prep (EEIP)	-	-	-	-	-
	Teachers-Classroom/TSA's	-	-	-	-	-
	Teacher Adjustments for Programs (Appeals, Supt. Approvals)	-	-	-	-	-
	Teacher Adjustment for Trades (Discretionary)	-	-	-	-	-
	Total Teachers	-	-	-	-	-
	Principal	-	-	-	-	-
	Assistant Principal	-	-	-	-	-
	Total Administrators	-	-	-	-	-
	Total Certificated	-	-	-	-	-
CLASSIFIED						
	General Classified Clerk	-	-	-	-	-
	Attendance Clerk	-	-	-	-	-
	Noon Supervisors	-	-	-	-	-
	Other Classified Clerical	-	-	-	-	-
	Total Classified	-	-	-	-	-
TOTAL BASE UNRESTRICTED FTE'S		-	-	-	-	-
3. SCHOOL SITE BASE CENTRALLY FUNDED SUBSTITUTE COST						
Object Code		Actual Projection SAL		Calc SAL		
1150	Teacher Sub projection	\$0		\$0	-	
TOTAL CENTRALLY PROVIDED PROJECTED SUBSTITUTE COST		\$0		\$0	0	
4. Centrally Provided and Funded FTE- UNRESTRICTED BASE						
Object Code		Actual FTE	Actual Total Sal/Benes	Calc FTE	Total Calc Sal/Benes	FTE DIFF
5721	Custodians	0.00	\$ -	0.00	\$ -	0.00
5732	Counselors	0.00	\$ -	0.00	\$ -	0.00
5741	School Site Security Officer(s)	0.00	\$ -	0.00	\$ -	0.00
5746	Budget Partner	0.00	\$ -	0.00	\$ -	0.00
5747	Human Resources Partner	0.00	\$ -	0.00	\$ -	0.00
5755	Network Partners	0.00	\$ -	0.00	\$ -	0.00
5708	Pathway Coaches	0.00	\$ -	0.00	\$ -	0.00
5709	Regional Athletic Directors	0.00	\$ -	0.00	\$ -	0.00
TOTAL CENTRALLY PROVIDED BASE UNRESTRICTED FTE'S		-	-	-	-	-
Summary		Actual Projected Allocation		17-18 Calculated Allocation	Difference	
ENROLLMENT		0		0	-	
BASE UNRESTRICTED FTE'S		0.0 \$ -		0.0 \$ -	\$ -	
CENTRALLY FUNDED FTE's		0.0 \$ -		0.0 \$ -	\$ -	
CENTRALLY FUNDED SUB'S		\$ -		\$ -	\$ -	
TOTAL UNRESTRICTED STAFFING ALLOCATION (includes projected sub cost)		0.0 \$ -		0.0 \$ -	\$ -	

*Also, please note, a site's budget worksheets will be regenerated if their base allocations or discretionary funding amounts change as a result of the Budget Development process, namely during the Appeals or Trades Phases.

a) Section 1: Enrollment

The first section of the FTE Worksheet details an alternative education site's enrollment numbers to be the highest number within a 10 month span of budget development. **For 17-18, those numbers include enrollment counts from March 2016 until February of 2017, provided by the Accounting Office, ADA specialist.** These numbers are derived from the Aries system and recorded for the state reporting process.

1. ENROLLMENT						
What you see	ENROLLMENT					
	Regular Enrollment		-	-	-	
	Inclusion Enrollment (counted in regular enrollment)		-	-	-	
	SDC Enrollment		-	-	-	
	Newcomers Enrollment (Students Enrolled by 20th day)		-	-	-	
TOTAL ENROLLMENT FOR PROJECTED BASE FTE			-	-	-	
Newcomers "Late" Enrollment (Projected incoming students after 20th Day)			-	-	-	
TOTAL ENROLLMENT			-	-	-	-
LCFF - Free & Reduce, ELL & Foster Youth %			0%	0%	0%	
TITLE I %			0%	0%	0%	

Regular Enrollment

Regular Enrollment represents the highest enrollment count for an Intensive Pathway site within a 10 month period. Enrollment during the year can fluctuate therefore requiring an investment into these programs to ensure that they are adequately staffed to absorb the populations of students that may pass within their sites.

Below are the projections used:

Oakland Unified School District												
Daily Enrollment by School by Month												
2015-2016					2016-2017							
Report Totals	March	April	May	June	Report Totals	Sept	Oct	Nov	Dec	Jan	Feb	17/18 Projection
SCHOOL NAME	Mo 8	Mo 9	Mo 10	Mo 11	SCHOOL NAME	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	
Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	
Community Day HS	21	24	25	25	Community Day HS	24	21	20	21	18	15	25
Community Day MS	6	7	9	9	Community Day MS	5	5	4	5	5	5	9
Dewey Academy	266	252	263	229	Dewey Academy	217	225	242	219	225	212	266
Ralph J. Bunche High	109	109	108	104	Ralph J. Bunche High	95	96	98	79	82	88	109
Rudsdale Continuation	144	145	143	143	Rudsdale Continuation	138	138	156	167	150	160	167
Sojourner Truth	184	191	194	173	Sojourner Truth	115	119	127	129	99	122	194
*Daily Enrollment by school - 6/9/2016												



Newcomer Program -(Rudsdale @ Lakeview)

A newcomer is a student who has been in the United States for less than a year. OUSD provides programming at certain school sites that specifically serve non-English speaking immigrant students in their first 3 years in the United States, as well as some high school students in their 4th year. These sites not only provide English Language Development (ELD) courses aimed at this population, but special content area courses as well as support for mainstreaming. Newcomer sites also have systems in place to provide services outside of the classroom to meet the needs of this population. The formal designation of newcomer sites is made by the Chief of Schools in coordination with ELLMA and newcomer sites frequently receive extra resources to serve these students and provide capacity for sites to receive students throughout the year.

While some newcomers attend nearly every school in OUSD, newcomer programs are located at designated sites where program infrastructure has been established and/or there are historically high concentrations of newcomer students in the neighborhood. Sites with these newcomer programs receive a second layer of projections, developed between the Enrollment Office and the ELLMA office, to account for the needs of these programs. Sites without these designated programs are still obligated to allocate the resources for English Learners they receive through LCFF (and other sources) to meet the needs of their newcomer students. The guidance below applies exclusively to sites with designated newcomer programs, which, for the 2017-18 school year are listed below. Sites interested in discussing services for their newcomers not listed below are encouraged to engage with ELLMA for thought partnership around allocating resources in service of these students as well as to understand the professional development and other services offered by ELLMA.

Designated Newcomer Programs for 2017-18

Elementary

Bridges at Melrose	Franklin	Garfield
Esperanza & Korematsu Discovery Academy		Manzanita Community School
Melrose Leadership Academy (K-8)		

Middle

Alliance	Bret Harte	Frick
Roosevelt	UPA	Westlake
Frick		

High

Castlemont	Fremont	Oakland High
Oakland International	Rudsdale @ Lakeview	

Newcomer Projections

Newcomer projections are issued for the sites listed above in two categories:

Day 20 Projections - These projections are a subset of the full Day 20 projections issued by the Enrollment office to school sites in late fall. Starting with the 2017-18 budget development cycle, the enrollment office listed newcomer Day 20 projections at the bottom of projection sheets so that sites with designated newcomer programs could determine what proportion of students in a given grade level are predicted to be newcomers. Please note that no Day 20 projections were issued for any elementary sites, even those with designated newcomer programs. Please also note that a zero in these projections boxes does not mean that no newcomers are expected sites without programs, simply that no Day 20 projections exist for that site.

Post Day 20 Projections (Late Comers)- Based upon an analysis of enrollment trends, which fluctuate wildly for newcomers, the ELLMA office issues Post Day 20 projections for newcomers, sometimes referred to in the budget process as “latecomers.” These projections account for the large number of newcomers who arrive after Day 20 and provide for positions to be budgeted at the start of the year to receive these students as the school year progresses. For the 2017-18 school year, the ELLMA office issued Post Day 20 projections to elementary sites with designated programs for the first time, and continued to issue projections for designated programs at the middle and high school level. Post Day projections do not appear on the projection sheets issued by the enrollment office, and first appear to site leaders when they receive their budget at the start of the budget development office.

The combined number of Day 20 projections and post Day 20 projections represents the total projected size of a newcomer program at a given site. Site leaders are responsible for designing a master schedule that accommodates all projected newcomers not only in newcomer-specific sections but also in electives, PE, and other courses. Compliance with the law, sound instructional design, and honoring student civil rights requires increased integration of newcomer students into the mainstream program of schools after their first year of enrollment in US schools.

Newcomer Staffing and Discretionary Allocations

Newcomer projections (Day 20 and Post Day 20) drive staffing allocation formulas as well as discretionary funds in a manner similar to other projections. Post Day 20 (Late Comers) Allocations are written in LCAP as supplemental (resource 0002) and the FTE will be reflected in this resource. Sites with designated newcomer populations are expected to allocate teachers driven by newcomer projections for newcomer classes, as well as for other sections necessary for a complete newcomer program, such as electives and PE. Non-teaching staff allocations at sites with designated newcomer programs are also expected to be allocated with consideration of the needs of newcomer students along with the rest of school enrollment. Discretionary dollars tied to newcomer projections should be allocated to supplemental materials, staffing, and other activities related to newcomers.

Secondary Newcomer Class Size Ratios

Progress has been made in recent years at maintaining a 25:1 “soft cap” class size for secondary newcomer programs, however secondary designated newcomer programs are still funded at a 32:1 class size. Sites will be able to maintain a 25:1 class size until all schools across OUSD reach 25:1, at which point they must be prepared to accept students up to the 32:1 ratio. This means secondary site leaders must design master programs that permit up to 32 newcomers in

newcomer sections as well as the elective and PE classes, although the hope is to maintain a 25:1 class size ratio for the majority of the school year.

Newcomer Projections and Consolidations

Due to the annual demand for more newcomer seats, as well as the well-documented volatility in newcomer enrollment, differences between projected Day 20 newcomer enrollment and actual enrollment are handled differently than other differences between projection and actual enrollment. Except in the case of extreme and unprecedented downturns in newcomer enrollment, sites with designated newcomer programs should not expect to experience consolidation of staff or resources in the event that their Day 20 newcomer enrollment is short of the Day 20 projection for newcomers. In the event that sites with designated newcomer programs experience other shortfalls in enrollment and consolidations, care must be made to ensure that reductions in staffing leave behind a master schedule that permits all projected newcomers to enroll in all necessary classes.

b) Section 2: Base Unrestricted FTE and Dollar allocations

For a site's unrestricted base FTE allocations, the budget worksheet includes the total amount of FTEs for teachers, administrators, and classified staff. In addition to the FTE, the total is shown in dollars and is based on average cost of salaries and benefits.

What you see

2. SCHOOL SITE BASE UNRESTRICTED FTE'S AND DOLLARS						
CERTIFICATED		Actual Projected FTE	Actual Projected Total Sal/Benes	Calculated FTE	Calc Total Sal/Benes	DIFFERENCE
	Teachers-Prep (EEIP)	-	-	-	-	-
	Teachers-Classroom/TSA's	-	-	-	-	-
	Teacher Adjustments for Programs (Appeals, Supt. Approvals)	-	-	-	-	-
	Teacher Adjustment for Trades (Discretionary)	-	-	-	-	-
	Total Teachers	-	-	-	-	-
	Principal	-	-	-	-	-
	Assistant Principal	-	-	-	-	-
	Total Administrators	-	-	-	-	-
	Total Certificated	-	-	-	-	-
CLASSIFIED						
	General Classified Clerk	-	-	-	-	-
	Attendance Clerk	-	-	-	-	-
	Noon Supervisors	-	-	-	-	-
	Other Classified Clerical	-	-	-	-	-
	Total Classified	-	-	-	-	-
TOTAL BASE UNRESTRICTED FTE'S		-	-	-	-	-

Base Allocations for K-12 sites are generated by formula using projected enrollment figures. ***For Intensive Pathway sites, the FTE requirements are in most cases, projected higher than the students projected at the highest enrollment counts.*** The FTEs provided through base allocations are not flexible and can only be adjusted through a review process. The review process and form to request an adjustment to the base labor allocation is included in the appendix. Moreover, a site is not responsible for managing the salary and benefits costs of these FTEs and any unfilled positions or vacancies will not result in vacancy savings to site budgets.

The approach, inputs and parameters for the 2017-2018 Base Allocations are detailed below.



Student:Teacher Ratios

The District has set the following student: teacher ratios for 2017-2018. The student:teacher ratio informs the number of base teacher FTEs allocated to a site and listed on a site's FTE Budget Worksheet.

For TK & K, 24:1 is a hard cap for each classroom.

For Grades 1-3, 24:1 is the average class-size across the school.

For all other grades, the student: teacher ratios remain unchanged, and are determined by the maximum class sizes permitted in the Oakland Education Association (OEA) – OUSD contract.

$$(Enrollment \# \times 6(Period \text{ per day}) / 5(teacher \text{ class load}) \times 32(class\text{-}size))$$

These ratios are for General Education students only. Schools are assigned additional teachers and other staff to support SDC students.

School Site Leaders (Certificated Administrators)

School site leaders support the management, safety, and professional growth of staff and students. In order to allow for effective impact of these positions, they have been provided to each site as part of base allocations. As required by ed code, every site receives 1 Principal, and Assistant Principals can range from 0-4 depending on projected enrollment.

The Ratio of Administrators to Teachers (RAT) includes little margin – to avoid significant financial penalties, we cannot increase the number of certificated administrators relative to the number of teachers.

Type of School	# of Students	Principal	Asst. Principal
Elem K-5	1-650	1	0
Elem K-5	650+	1	1
MS 6-8	1-200	1	0
MS 6-8	201-550	1	1
MS 6-8	551-800	1	2
MS 6-8	801+	1	3
K-8	1-500	1	0
K-8	501-800	1	1
K-8	801+	1	2
G 6-12	200-400	1	1
G 6-12	401-1000	1	2
G 6-12	1001+	1	3
HS 9-12	1-200	1	0
HS 9-12	201-500	1	1
HS 9-12	501-1000	1	2
HS 9-12	1001-1500	1	3
HS 9-12	1501+	1	4

- **INTENSIVE PATHWAY REQUESTS FOR FTE ARE REQUESTED THROUGH THE ALT ED DIVISION**

Classified/Clerical Guidelines

Classified/Clerical Staff play a key role in a school site's ability to maintain records and overall school operations as well as help to meet school goals for improved attendance management. Sites receive clerical/classified staff within base FTE allocations. Of these positions, the general clerical, attendance clerk, and noon supervisor are non-negotiable and can only be adjusted through a review process. Other classified/clerical positions, such as library clerk and community



assistant, may be “traded” for another FTE or converted into dollars through a review process. The review process and form to request an adjustment to the base labor allocation is included in the appendix.

Type of School	# of Students	Required/Non-Negotiable			Flexible (eligible for "trades")
		General Clerical	Attendance Clerk	Noon Supervisor	Other
Elem K-5	1 to 400	1	0.5	0.4	0
Elem K-5	401 to 600	1	0.5	0.5	0.5
Elem K-5	601 to 800+	1	1	0.6	1
MS 6-8	1 to 400	1	0.8	0	0
MS 6-8	401 to 600	1	1	0	2
MS 6-8	601 to 800+	1	1	0	2.5
K-8	1 to 400	1	0.8	0.4	0
K-8	401 to 600	1	1	0.4	0.5
K-8	601 to 800+	1	1	0.5	1
G 6-12	1 to 400	1	0.8	0	1
G 6-12	401 to 600	1	1	0	2
G 6-12	601 to 800+	1	1	0	3
HS 9-12	1 to 300	1	1	0	1
HS 9-12	301 to 600	1	1	0	2
HS 9-12	601 to 900	1	1	0	3
HS 9-12	901 to 1200	1	1	0	4
HS 9-12	1201 to 1500	1	2	0	5
HS 9-12	1501 to 1800	1	2	0	6
HS 9-12	1801 to 2000+	1	2	0	7

Note: For a list of which type of classified positions are in each bucket, see Appendix(page48).

c) Section 3: Base Centrally Funded Substitute Costs

Substitute teacher costs are included as a base allocation. They are based upon historical use.

3. SCHOOL SITE BASE CENTRALLY FUNDED SUBSTITUTE COST					
Object Code			2016-2017		2015-2016
1150	Teacher Sub projection		\$35,539		\$35,539
TOTAL CENTRALLY PROVIDED PROJECTED SUBSTITUTE COST			35,539		35,539

d) Section 4: Centrally Provided and Funded FTE – Unrestricted Base

For **centrally-managed FTE & services**, the budget worksheet lists the services for a site based upon criteria established by the central office. The District provides essential services that are core to a site’s operation and are critical to the function of all schools. Most of these centrally-provided base allocations can be increased and purchased at the discretion of the site leader and school community with the use of site-based unrestricted discretionary funds. Some services are not provided centrally, but are available for purchase with unrestricted discretionary funding.

Note for counselors: Counselors are centrally funded and allocated at 500 to 1, above the OEA contract-driven formula of 700 to 1 ensure we maintain the required student to counselor ratios.

4. Centrally Provided and Funded FTE- UNRESTRICTED BASE						
Object Code		2016-2017 FTE	Total Sal/Benes	2015-2016 FTE	Total Sal/Benes	FTE DIFF
5721	Custodians	2.0	\$ 139,058	2.0	\$ 119,400	0
5732	Counselors	0.0	\$ -	0.0	\$ -	0
5741	School Site Security Officer(s)	0.0	\$ -	0.0	\$ -	0
5746	Budget Partner (Per Network)	1.0	\$ 146,108	1.0	\$ 77,256	0
5747	Human Resources Partner (Per Network) (includes Staffing Analyst, Talent Associates & School Pa	1.0	\$ 146,774	1.0	\$ -	0
5755	School Improvement Partners (per Network)	1.0	\$ 8,356	0.0	\$ -	1
5708	Pathway Coaches	0.0	\$ -	0.0	\$ -	0
5709	Regional Athletic Managers	0.0	\$ -	0.0	\$ -	0
TOTAL CENTRALLY PROVIDED BASE UNRESTRICTED FTE'S		5.00	440,296	4.00	196,656	1.00

When a site is purchasing additional services, a services contract must be completed and signed (See **Appendix B**). This contract must be signed by the site and submitted in advance of the Budget Development Lock-in Sessions. *Also please note, for Custodial Services you must complete the form even if you plan to maintain your base allocation.*

Centrally-Provided Services

Centrally provided services are as follows; additional services can be purchased beyond the centrally-provided allocation.

For additional Purchase	Services Available	Site Funded Object Code	Centrally Funded Object Code
	Counselors	5732	5703
	Custodians	5721	5701
	SSOs	5741	5704
	Nurses	5735	5705
	Psychologists	5734	5702
	Tech Services	5737/FTE	
	Budget Partner		5746
	HR Partner	5757	5747
	School Partners		5755
	Pathway Coaches		5708



	Regional Athletic Managers		5709
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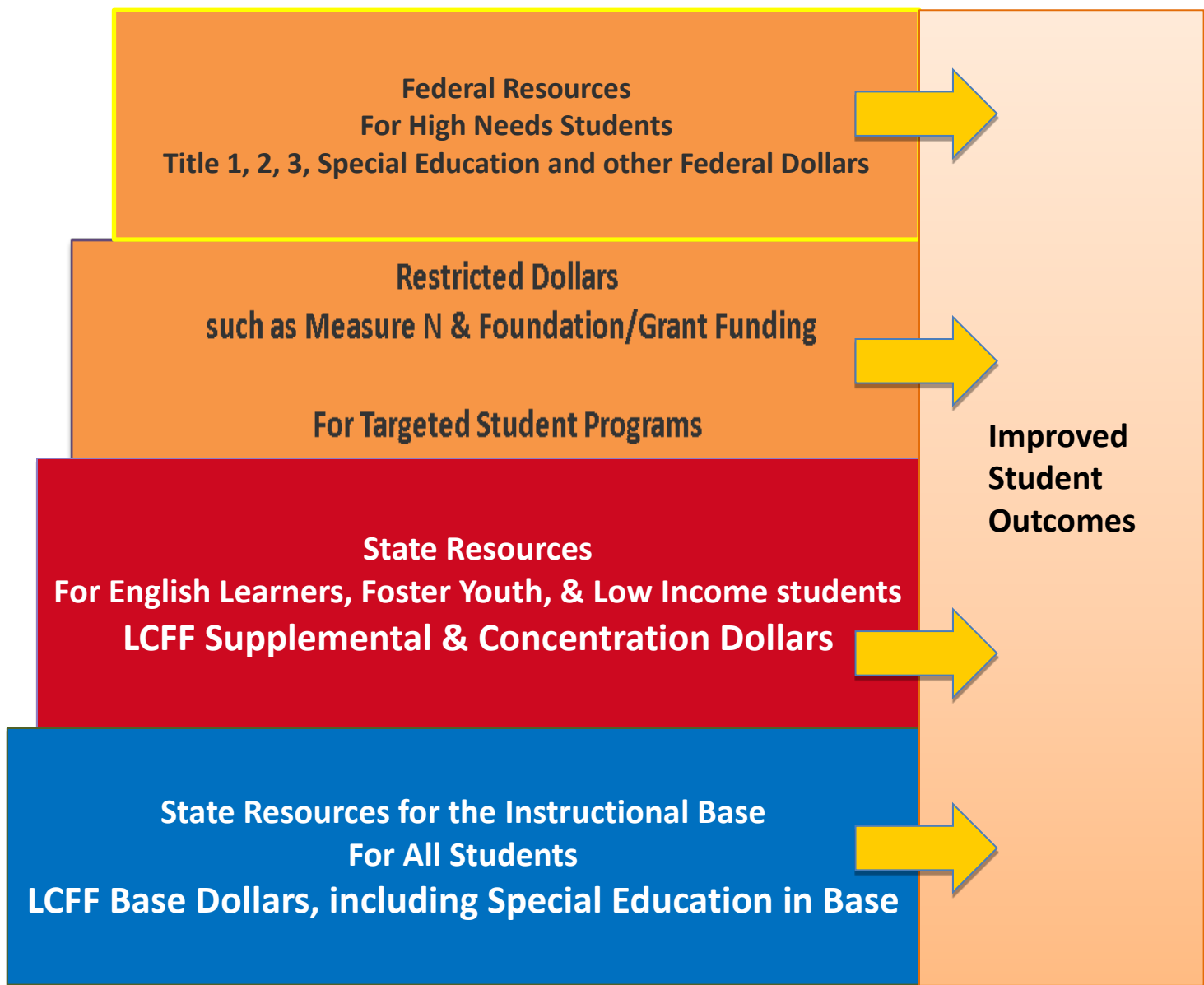
Central Services for Purchase

Service	Site based Object Code
Manhood Development Program Facilitator	5733
Mental Health Provider Intern	5739
Restorative Justice Coordinator	5736
Duplication	5716
Mail Services	5724
Adult & Career Education	5751

SERVICES FOR PURCHASE (p/1.0FTE)	2017-2018
Custodian	\$ 62,637
School Security Officer	\$ 61,119
Manhood Development Program Facilitator	\$ 92,364
Mental Health Services	see program mgr
Restorative Justice Coordinator	\$ 116,712
Community School Program Manager	\$ 125,164
Psychologists	\$ 121,297
School Technology Specialist	\$ 89,455
Adult & Career Education	see program mgr

2. 2017-18 Color of Money Improving Students Outcomes

Below is a chart of the types of money that flows through school sites.



- *LCFF was designed to direct resources to those students who need them the most.*
- *A “Base” level of funding is provided per pupil, with differentiation for grade.*
- *Additional resources are provided for students who are low income, English learners, and foster youth.*



Unrestricted Discretionary Funds

The first column shows the site's **unrestricted discretionary base funding amounts**. These are dependable and guaranteed General Purpose funds provided to a school based on enrollment projections and intended to cover the cost of the site's basic operational and other program needs, including but not limited to additional FTEs, supplies, books, contracted services and equipment to support the school site educational environment. **The usage of discretionary funds should reserve a minimum of 65% for non-salary expenses such as supplies, copier maintenance agreements and so forth.**

Per pupil allocations are driven by grade span and school type.

Please keep in mind if you are utilizing base discretionary funds to purchase an additional FTE, you must complete a request form through your network. Your planning budget will be charged the **average** salary and benefits cost (See Appendix D) for the position, no matter the actual cost of the person filling it and unfilled positions or vacancies will not result in vacancy savings to site budgets.

School Type	Discretionary Base amount per student, includes SDC
ELEMENTARY SCHOOL (TK-5)	\$175
TK-8 SCHOOL	\$200
MIDDLE SCHOOL (6-8)	\$225
HIGH SCHOOL (6-12)	\$263
HIGH SCHOOL (9-12)	\$300

Discretionary Formula = (Total Non-SDC + SDC Enrollment) X (Base amount per student)

For Intensive pathway sites allocations defined by the K-12 discretionary outline does not suffice in the ability to maintain the fluctuations of the program. Therefore, discretionary funding is provided to allow flexibility in usage without conflict of student populations' vs resource type.

Supplemental & Concentration Funds

Supplemental & Concentration funds are allocated to the District based upon enrollment of students across three LCFF target populations, namely Low-income, English Language Learners (ELL), and Foster Youth.

More specifically, the Budget Allocation Worksheets reflect funding a site will receive based upon the demographics of enrolled students for Supplemental funding, and based on the site's Z Score (also known as the "Environmental Score") for Concentration funding. **Intensive Pathway sites may harbor a number of populations of students, therefore their allocations are populated in base. Supplemental contributions are calculated as the number above the per student allocation for high schools students within the LCAP.**



Funds Allocated by SPF - Instructional Program investment (1101) & Measure G Ed Effectiveness (1442) Funds

During the 2016-17 fiscal year there were programs identified as supplemental within the LCAP that were not coded as such within IFAS. Program Investment allocations were distributed in resource 0000(General Purpose), programs 1101. In 2017-18 in accordance to the LCAP language these funds will be coded in resource 0002-Supplemental, program 1101.

The table below provides the per pupil allocations for the Instructional Program Improvement funding, Intensive

SPF Designation	Program Investment per student award	Measure G Per student award for Ed Effectiveness	# of schools
Red	\$125	\$90	16
Orange	\$95	\$65	37
Yellow	\$75	\$50	16
Green	\$60	\$40	10
Blue	\$40	\$30	5
ISS Add'l Award	\$10	-	5
Total by Program	\$3,082,260	\$2,142,990	
Total		\$5,225,250	

Support Schools and the Educator Effectiveness (TGDS) funding (see note below).

Note on Educator Effectiveness Funding: Teacher Growth and Development System (TGDS) is the districtwide program for improving educator effectiveness. **All schools must provide for the need to support coverage for peer observers and alternate observers.**

Program Investment Formula = (Non-SDC Enroll. + SDC Enroll.) X SPF Rate per student

TGDS Formula = (Non-SDC Enroll. + SDC Enroll.) X SPF Rate per student

Measure G-Library Services

To provide additional resources to schools for library services, \$1.7 million of Measure G funds will be allocated to school sites to be used for library services. The funds can be used in the following ways:

In 2016 Measure G Library funds were earmarked to improve literacy through developing school libraries. The funding strategy was to distribute funds widely across 63 schools, with the expectation that schools would supplement funds in order to staff libraries and add quality resources. Analysis of this year's development has led us to the conclusion that this strategy, while providing resources, did not significantly increase the number of open libraries or the quality of resources. [New guidelines](#) have been established. In 2017 the funding strategy is to focus and deepen funding at fewer



sites in order to assist those schools with existing libraries to improve quality and to assist closed libraries in opening with professional staffing.

2017 Library Funding Process: The goal of the Library Measure G funding is to create equity throughout the District in addition to striving for the quality outlined in the [CA State Model School Library Standards](#).

1. All sites wishing to apply for funding will fill out the 2017-18 Library Funding application.
2. Sites will self-assess the development of their library (see below) and lay out a plan for the library to be open, staffed and resourced using the CA State Library Standards as a guideline to quality.
3. Applications are due **Monday, February 13**. [Application for 2017-18 Library Funding](#)
4. Applications will be collectively reviewed and may require site visits, and approved in time for budgeting for staff in the Budget Development Lock-in. Approved funds will be allocated at this time.
5. Priority for funding will be based on the following factors: School Performance Framework status; Developmental stage of the Library; History of Site-Initiated Prior Funding that the 17-18 request builds upon; and Evidence of Other Resources directed toward the library.

Information on Assessing Developmental Stage of Site Libraries: The [District Library Manager](#) is available for support in understanding the stages by providing an overview and context of OUSD libraries and CA State Standards.

Stage	Description
1	Library currently closed. No dedicated library staff. Current space used for multiple purposes other than library services or programs.
2	Library open minimal hours per week. Staffed by Stip-Subs, teacher without library credential or other staff working in the library. Currently lacking one or more of the following: up to date resources, furniture, technology.
3	Library open 4 - 5 days of the week, with regular class visits, staffed by teacher or MLIS librarian, with adequate amounts of up to date resources, furniture, technology.
4	Library in alignment with CA State Library Standards with Professional Teacher - Librarian (holds both a teacher credential <u>and</u> library credential), 28 books per student with an average copyright date of 2006

[Restricted Resources](#)

For a site's **restricted resources**, the Budget Allocations Worksheets lists the relevant funding by source as well as the total allocated amount.

Please keep in mind if you are utilizing Restricted funding for the purchase of additional FTEs, your budget will be charged the **actual** salary and benefits costs for the person filling position.

For additional details and to view any rules and regulations, please see below.



Title I

The purpose of Title I is to improve instruction in high poverty areas to ensure all students meet high academic standards.

Title I funds can be used to enhance and supplement the existing core program. Title I funds cannot be used to pay for staffing, materials, and/or services that students are required to have as a part of their core educational needs. Please see below for more detailed examples of allowable and non-allowable expenses for Title I. Additionally, all planned expenses for Title I must be officially reviewed, approved, and signed-off by a site's School Site Council (SSC). There are no exceptions to this rule and, as such, SSC engagement must be done in a proactive and meaningful way and align with the overall Budget Development timeline.

ALLOWABLE Expenses:

- Provide extended learning time, e.g. before/after school programs; summer intervention; & pull out focused instruction.
- Instructional materials for extended learning time; supplemental materials.
- Direct services to ensure that students stay in school (nurses, social workers, psychologists, additional counselors, community liaisons).
- Professional Development (PD) for teachers to enable Title I students to meet academic achievement standards.
- Support for PD (extended contracts, paid in-services, overtime, supplemental books, software, and substitutes for PD release time).
- Travel/Conferences (Title I related)
- Light Refreshments at Title I parent events (curriculum and data analysis based – not a social event or SSC meeting).
- Parent involvement activities (presenters, materials, transportation that support parent education to improve academic achievement).
- Supplemental instructional technology
- Field trips and study tours that directly support the core curriculum (no trips to amusement parks – no celebration field trips).

Expenses NOT ALLOWED:

- Regular classroom teachers who do not provide supplemental education.
- Administrative personnel at school sites
- Core Instructional Materials and Textbooks
- Custodial, Athletic, or Medical Supplies
- Meeting refreshments for social events or SSC meetings



After School Funding- 21st Century & ASES

After School Education & Safety (ASES) and 21st Century Community Learning Center (“21st Century”) are State & Federal grants made available to the District as restricted resources. These resources can only be used to support expanded learning programming that occurs outside of the regular hours of the school day. ASES funds can only be used for after school programming. 21st Century funds can be used to support after school, weekend, intercession, and summer programming. Also note, even though 21st Century is a Federal grant, the State applies the rules and flexibilities for this funding as it must be aligned with state policies.

The State sets after school program requirements based on after school grant legislation. Elementary and middle school after school programs must operate every day of the school year until 6pm, and are allowed to close for only 3 days over the course of the school year for staff professional development. High schools must operate a minimum of 15 hours per week.

This funding is received by OUSD in collaboration with community partners. The majority of the after school grant dollars are contracted to community partners who serve in the After School Lead Agency role and are responsible for hiring program staff, operating daily after school programs, and ensuring high quality academic and enrichment programming. Each year in the spring, lead agencies are required to engage in collaborative planning with school leaders to develop after school program and budget plans for the upcoming school year. These plans are approved by the OUSD school board as part of the lead agency contract.

Although most grant funds are contracted to lead agency partners, some funds can stay in school site budgets to cover the cost of teachers working in the after school program on extended contract, classified staff working overtime in the after school program, and after school curriculum and supply purchases. After school grant funds contracted to agencies or left in school site budgets must be used for direct service expenses.

Restricted Title I Allocation & After School Programming (SSC approval required)

The funds allocated to Title 1 schools to supplement not supplant the services that would be provided in the absence of these funds. The funds allocated for After School Programming must be used for expenses incurred outside of the normal school hours. School Site Councils must approve the use of these funds. SSCs can use these funds for instructional support, professional development, technology support, and parent involvement initiatives. Schools are required by law, to document a plan that outlines the appropriate use of these funds and obtain SSC approval of such plan.

Restricted Grants, Contracts & Cooperative Agreements - Resources vary

Grant, contracts, and cooperative agreements (collectively called “sponsored projects”) are externally –funded activities in which a formal written agreement is entered into by OUSD and a sponsor. This form of revenue requires board approval. To load funds into a site’s budget, confirmation (i.e. letter from donor confirming funding in the upcoming school year or board approval documents) must be submitted to the Budget Office prior to the Budget Development Session.



Measure N Funds

The Oakland College & Career Readiness For All Act is established to pay for the implementation of a comprehensive approach to high school education in Oakland that integrates challenging academics with career-based learning and real-world work experiences. This comprehensive approach creates small learning communities of career-oriented pathways, and offers intensive, individualized support to create the conditions for all students to graduate high school prepared to succeed in college and career.

The Goals of Measure N

Decrease the high school dropout rate

Increase the high school graduation rate

Increase high school students' readiness to succeed in college and career

Increase middle school students' successful transition to high school

Reduce disparities in student achievement and student access to career pathways based on race, ethnicity, gender, socioeconomic status, English Learner-status, special needs status, and residency

Permissible Uses of Measure N

Measure N proceeds shall be spent on the following school programs:

To increase support for students in college preparatory courses in every high school to ensure students are qualified for admission to the University of California and other 4-year university systems, and are prepared to succeed in college

To provide work-based learning in every high school, including career exploration, career technical education courses, job shadowing, internships, and job certifications

To reduce the drop-out rate by providing counseling, tutoring, mentoring and other intensive support services to students in danger of not graduating high school

To provide programs to students transitioning from 8th to 9th grade to prepare them to succeed in high school, and to students transitioning from 12th grade to college prepare them for admission and success in college

In order to expend Measure N funds, the expenditures must meet the 5 criteria below:

Be Incorporated in the Measure N Education Improvement Plan that was passed by the Measure N Commission and the OUSD Governing Board.

Align to the purpose of the Measure N Initiative outlined above.

Logically lead to the Measure N Outcome Goals

Be aligned to the permissible uses outlined above.

Not supplant existing programs, positions, or expenditures at the school site that were previously supporting the Measure N Goals and Outcomes.

OUSD High Schools Only: Please reference Proper Justification for Measure N IFAS Requests for examples of justification required when using Measure N funds.



Examples of Permissible Expenses

Planning Grant	Education Improvement Plan (SPSA)
School Site Visits Teacher stipends for planning or implementation of pilot programs Stipends for student alumni to participate in planning process Stipends for parents Pilot programs that promote increased outcomes and may be cornerstones for pathway development Planning meetings to address new designs or inquiry	Salaries: Teachers salaries for shifts in academic program to provide more support, or acceleration. Benefits: Benefits associated with staffing positions outlined above Stipends: Teacher stipends Stipends for student alumni Stipends for parents Staff: Student support positions and salaries associated with the accelerations Consultants to build out programmatic elements to support career pathways Programs and Support Services: Pilot programs that promote increased outcomes that meet the goals of Measure N 9th grade summer bridge and support programs Other innovative programs that have a proven track record of academic improvement Support services for specific student populations that improve their academic outcomes Dual enrollment courses and books Intervention strategies Field trips that are essential to the pathway program of study, CTE courses, project-based learning, etc. Deeper Learning Opportunities: Professional development Conferences School Site Visits Meetings Supplies and materials



3. Comparison Worksheet

The comparison worksheet is a summary that compares the projected allocations based upon K-12 criteria and the actual allocations provided for the 2017-18 fiscal year..

OUSD BUDGET DEVELOPMENT					
BUDGET ALLOCATION WORKSHEET COMPARISON					
SCHOOL INFORMATION					
Site Name: _____		 OAKLAND UNIFIED SCHOOL DISTRICT Community Schools, Thriving Students			
Site Code: _____					
ALLOCATION FACTORS	Calculated	Actual Projected	Difference		
ENROLLMENT					
REGULAR	0	0	0		
SDC	0	0	0	0	
TOTAL	0	0	0	OUSD BUDGET DEVELOPMENT	
TITLE 1%	0.0%	0.0%	0.0%	Kick Off Mtg: February 10, 2017	
Z-SCORE	0.0%	0%	0.0%	Tool Avail: February 17th	
SPF FACTOR	0	0	0	Sessions: February 28th - March 13th	
ISS FACTOR	0	0	0		
ALLOCATION TYPE	RESOURCE	PROGRAM	Calculated Allocation	Actual Projected Allocation	DIFFERENCE
UNRESTRICTED ALLOCATIONS					
General Purpose BASE FTE	0000	1110	\$ -	\$ -	\$ -
General Purpose Base Discretionary	0000	1106	\$ -	\$ -	\$ -
General Purpose School Site Adj	0004	1110	\$ -	\$ -	\$ -
GP-Supplemental Newcomer FTE	0002	11XX	\$ -	\$ -	\$ -
GP -Supplemental Call Funds	0002	0107	\$ -	\$ -	\$ -
GP- Supplemental Program Invmnt	0002	1101	\$ -	\$ -	\$ -
General Purpose Supplemental	0002	0002	\$ -	\$ -	\$ -
General Purpose Concentration	0003	0003	\$ -	\$ -	\$ -
Measure G TDGS	0089	1442	\$ -	\$ -	\$ -
Measure G Library	0089	1552	\$ -	\$ -	\$ -
TOTAL UNRESTRICTED ALLOCATION			\$ -	\$ -	\$ -
RESTRICTED ALLOCATIONS					
Title I	3010	4850	\$ -	\$ -	\$ -
Title I Parent	3010	4854	\$ -	\$ -	\$ -
ASES - AfterSchool	6010	1553	\$ -	\$ -	\$ -
21st Century - AfterSchool	4124	18XX	\$ -	\$ -	\$ -
Measure G1 (grades 6-8)	9332	XXXX	\$ -	\$ -	\$ -
Measure N (grades 9-12)	9333	1690	\$ -	\$ -	\$ -
TOTAL UNRESTRICTED ALLOCATION			\$ -	\$ -	\$ -
Total Unrestricted			\$ -	\$ -	\$ -
Total Restricted			\$ -	\$ -	\$ -
TOTAL SITE BUDGET			\$ -	\$ -	\$ -

- The Calculated Allocation represents the allocation warranted based upon the criteria provided to the K-12 program.

- The Actual Projected Allocations represents the allocation granted for the 2017-2018 fiscal year. These funds will be loaded into the budget development tool.

4. Rules & Flexibilities

Please see below for the required & recommended parameters for Budget Planning in 2017-2018:

Requirements

A Principal is required at every school site.	REQUIRED
Certificated teachers to meet class-size contractual agreements & LCFF requirements, A-G, and other program requirements.	REQUIRED
Attendance Clerk to address attendance accounting and reduction in audit findings.	REQUIRED
General Clerical to provide operations support	REQUIRED
Noon-Supervision (elementary only) to cover supervision of students during non-instructional time.	REQUIRED
To ensure site solvency a minimum 65% of the <u>base discretionary funding</u> allocation must be spent on: Supplies, copier maintenance agreements, Overtime/Extended Time, and other essential operating costs to address needs of students, staff and community.	REQUIRED

Allowable Flexibilities with Approval

Trading Assistant Principal positions for TSA, certificated teacher positions, or classified administrative or other classified positions.	FLEX
Trading clerical, classified, and certificated positions for additional discretionary dollars.	FLEX
Purchasing additional FTE beyond the base allocation (See Appendix D for list of Commonly Purchased FTE Average Salary Costs).	FLEX

Buying Down Class-Size – Allowable with Approval

If using the unrestricted base funds , average salary cost will be used.	FLEX
If using unrestricted supplemental/concentration or restricted resources actual salary cost will be used.	FLEX

Split Positions – Allowable with Approval

FTE can be split, (ex. split a 1.0 FTE position into .5 FTE & .5 FTE	FLEX
--	-------------

***IMPORTANT NOTE:** Unfilled positions or vacancies in base **WILL NOT** result in vacancy savings to site budgets.

Paying for Positions

How much do I budget in Budget Development (BD) Tool?	
If adding a new/vacant FTE, budget the average salary (and consider a cushion) in the site budget.	If planning for an existing/filled position, budget the actual FTE salary in the site budget.
How much am I charged in IFAS?	
If paying with your unrestricted base discretionary funding allocation, the average salary will be charged to the site's budget. <i>Note: you will see actuals in IFAS, but are not responsible for covering negatives nor are salary savings available to you.</i>	If paying with unrestricted supplemental or concentration funding or restricted resources funding, the actual salary will be charged to the site's budget.

5. Guide for Community Engagement and SSC Discussions

- A school must engage with their School Site Council at all stages of the 17-18 Single Plan for Student Achievement (SPSA) planning and budget development. Specifically the SSC should review and approve each “program” section of the SPSA, including for each Major Improvement Strategy: the School Goal, the Root Cause Analysis, the Major Improvement Strategy and Key Practices.
- NOTE: For the draft “program” planning done using the SPSA V1 tool, SSC review and approval of the program sections is not necessary. This tool is designed to support quality program planning, with teacher leadership and the SSC, in order to arrive at a 17-18 Budget, built on agreed budget priorities. Following budget development, the school will have several weeks to finalize the program sections in the formal SPSA tool and to get SSC review and approval of it.
- According to the new LCAP guidelines, the principal must indicate that the SSC has specifically reviewed LCAP Discretionary, Supplemental, and Concentration funds expenditures, as well as Partnership Academy, 21st Century Community Learning, and After School Learning & Safehood funds expenditures. The spirit of this new guidance is that schools should make sure their community clearly understands how all funds are spent in support of the school's continuous improvement. Transparency is the key. However, it should also be noted that “reviewed” is not the same as “approved”, and principals should carefully facilitate the SSC's understanding of this distinction. Agenda minutes should be sure to use specifically the language “reviewed”.
- As has always been the case, the principal must indicate that the SSC has specifically approved, by formal vote, all Title I funds expenditures. In addition, if a school funds staff FTE (not simply consultant services) out of 21st Century Community Learning and After School Learning & Safehood resources, they must also have SSC approval. Again, agenda minutes should be sure to use specifically the language of “approved” and record the SSC vote.
- Given that sometimes at a school's Budget Development session new information comes to light that changes budget decisions made with SSC approval, District leadership is now requiring that principals arrive at their Budget session with SSC-reviewed Staffing, Basic Ops, and Non-Labor plans which outline the ranked priorities a school has for its expenditures. SSCs should review these plans and specifically approve the Title I prioritized expenditures, so that, if a principal must make adjustments to their school's budget at the Session, they have reviewed/approved priorities to guide these adjustments.



6. Required Actions & Successful Outcomes for Phase 1

Required Actions & Successful Outcomes for Phase 1	
ACTION 1: REVIEW ENROLLMENT, PERFORMANCE DATA & CURRENT YEAR BUDGET	
	- OUTCOME 1(a): Site leader clearly understands current year program design and budget and has a general sense of what has been working, what they would like to continue, and potentially discontinue for next year. - OUTCOME 1(b): Site leader and central office support staff have worked together to gather necessary data and launch planning efforts.
ACTION 2: REVIEW HANDBOOK	
	OUTCOME 2: Site leader understands overall process, timing, rules, flexibilities and how they will engage with central offices and their community throughout Budget Development.
ACTION 3: REVIEW 1-Budget Worksheet	
	- OUTCOME 3(a): Site leader has a basic understanding of next year's resources (budget worksheets) and is beginning to envision strategic approach for next year concerning: program design, allocation of discretionary resources and a master schedule is in draft form. - OUTCOME 3(b): Site leader has thoroughly reviewed teacher base allocation as provided via staffing formula (budget worksheets) and has determined if an appeal for additional teachers is needed.
ACTION 4: ATTEND KICKOFF MEETING & OTHER TRAININGS AS NEEDED	
	OUTCOME 4: Site leader is equipped with knowledge and tools to execute a successful Budget Development process.
ACTION 5: SCHEDULE CONSULTATIONS WITH CENTRAL OFFICES & COMMUNITY	
	- OUTCOME 5(a): Site and central office stakeholders scheduled all meetings for Budget Development and blocked out time on calendars as well as made arrangements for coverage. - OUTCOME 5(b): Site leader has engaged SSC and community to identify major improvement strategies/key practices for the next year.
ACTION 6: PREPARE TO ALIGN RESOURCES TO SCHOOL PLAN FOR STUDENT ACHIEVEMENT (SPSA).	
	OUTCOME 6: The SPSA strategies are prioritized funding actions for next year's budget.
ACTION 7: CONSIDER MENU OF ADDITIONAL CENTRAL SERVICES	
	OUTCOME 7: Overall program design is being considered and central services are being proactively thought of and incorporated into the plans at an appropriate time.

V. PHASE 2: APPEALS (OPTIONAL)

Required Actions and Successful Outcomes for Phase 2

Important Note:

The Appeals phase is ***optional*** and should only be carried out by sites **requesting adds to their base teacher FTE allocation** specifically to accommodate needs for one of the following programs:

- Small bilingual classes
- Middle school electives
- High school A-G requirements

Should a site not engage in appeals, they should continue on with Phase 3: Consulting.

ACTION 1: AS NEEDED & WITHIN CRITERIA, SUBMIT APPEALS FOR ADDS TO BASE TEACHER ALLOCATION.

- OUTCOME 1 (a): Appeals, including Appeals form (see Appendix E) & Master Schedule, are submitted to Network by Jan. 27 deadline.
- OUTCOME 1 (b): Networks and Principals meet to review and discuss appeals.
- OUTCOME 1 (c): Budget Dept. receives final decisions and budget tool & worksheets will be updated if appeal is granted.

ULTIMATE GOAL: ALL APPEALS SUBMITTED AND DENIED OR APPROVED.

VI. PHASE 3: DECISION MAKING & TRADES

Required Actions and Successful Outcomes for Phase 3	
<i>ACTION 1: DECIDE WHICH ACTIONS TO FUND (incl. Central Services).</i>	
	OUTCOME 1: Program design is becoming more full and realized. Sites begin to sign-off on central service contracts.
<i>ACTION 2: COMMUNICATE LABOR "TRADES".</i>	
	OUTCOME 2: Final staffing footprint for site and ratios are confirmed as compliant. 1-pager is regenerated by Budget Dept.
<i>ACTION 3: DETERMINE HOW TO FUND EACH PLANNED ACTION WITHIN ALLOCATED RESOURCES.</i>	
	OUTCOME 3: Program design and staffing footprint are solidified identifying acceptable and available funding resources. Budget Development Tool should be accessed and utilized for this action.
<i>ACTION 4: SIGN CENTRAL SERVICE CONTRACTS.</i>	
	OUTCOME 4: Central services are confirmed.
<i>ULTIMATE GOAL: SITE LEADERS HAVE 1 PLAN FOR APPROVALS.</i>	



VII. PHASE 4: CONSULTING, FINAL APPROVALS MEETING & LOCK-IN

Required Actions and Successful Outcomes for Phase 4	
<i>ACTION 1: SECURE APPROVAL FROM SSC+ ON ALL FUNDED ACTIONS.</i>	
	OUTCOME 1: Community buy-in is reflected in budget & SPSA moving forward.
<i>ACTION 2: SECURE SSC SIGN-OFF & OFFICE OF ACCOUNTABILITY APPROVAL ON TITLE I.</i>	
	OUTCOME 2: Site enters Title I allocations into tool. Site can plan and hire with Title I funds as needed.
<i>ACTION 3: SECURE APPROVAL FROM HR ON ALL STAFFING CHANGES.</i>	
	OUTCOME: Site receives sign-off form and enters all proposed changes into tool. Site will be able to plan and hire with funds as needed.
<i>ACTION 4: PLAN/ENTER APPROVED DISCRETIONARY EXPENSES IN TOOL.</i>	
	OUTCOME 4: Plan is reflect as much as possible in tool prior to your lock-in session in tool and balances. Site leader is ready for budget lock-in session.
ULTIMATE GOAL: SITE LEADERS HAVE 1 APPROVED PLAN AND PREPARED TO REFLECTED IN BUDGET DEVELOPMENT TOOL.	
<i>ACTION 5: PRINCIPALS SHARE FINAL PROPOSED PLAN WITH CENTRAL OFFICE LEADERSHIP AND PARTNERS.</i>	
	OUTCOME5: Budget & plan are agreed upon by all stakeholders.
<i>ACTION 6 PRINCIPAL & NETWORK SUPT SIGN FINAL APPROVALS FORM.</i>	
	OUTCOME 56 Budget & plan are confirmed for next year.
<i>ACTION 7: CLOSE & LOCK TOOL AT MEETING.</i>	
	OUTCOME 7: No changes can and will be made until FY 2017-2018 (July at earliest).
ULTIMATE GOAL: PLAN & BUDGET ARE FINAL & LOCKED UNTIL NEXT FY.	



APPENDICES TO THE 2017-2018 BUDGET DEVELOPMENT HANDBOOK



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Board Policy 3150

OAKLAND UNIFIED SCHOOL DISTRICT Board Policy

BP 3150

Business and Non Instructional Operations

Results- Based Budgeting

The Board Policy on Results-Based Budgeting provides policy direction to the Superintendent regarding the Oakland Unified School District's continuous budget development process. The Board Policy on Results-Based Budgeting is directly aligned to and builds upon Board of Education policies on School Governance and Quality School Development.

The Board of Education hereby establishes the following principles to guide the Oakland Unified School District's annual budgeting process:

1. The allocation and expenditure of OUSD financial resources shall be aligned to the achievement of continuous improvement in school quality and student outcomes.
2. The allocation of OUSD financial resources to schools shall be maximized.
3. The distribution of OUSD financial resources to schools shall account for varying student needs and neighborhood conditions.
4. School governance teams shall be empowered to budget and expend OUSD financial resources.
5. The general public shall have timely access to accurate, comprehensive, and easily comprehensible OUSD financial management information at the school, department, and district-wide levels.

Within the context of established OUSD strategic priorities, state and federal regulations, and collective bargaining agreements, the Board of Education hereby establishes its intent to:

1. Adopt three-year district-wide School Quality Improvement goals, benchmarks, and priorities (i.e. Balanced Scorecard, Local Control Accountability Plan) toward which every school and every central administration department is responsible for achieving steady measurable progress.
2. Hold every school responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that enables each school to realize steady measurable progress toward achieving Board-adopted School Quality Improvement goals and growth targets.
3. Hold every central administration department responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that demonstrates how each department is achieving steady measurable progress toward providing the supports each school needs to achieve their School Quality Improvement goals and growth targets.
4. Maximize the allocation of all Unrestricted General Fund revenue (i.e. Local Control Funding Formula – Base, Supplemental, Concentration, and local tax revenue) to schools by:
 - a. First, paying all legally required district-wide obligations (e.g. State Emergency Loan, charter school pass-through payments, audit findings).
 - b. Second, allocating up to 12% of all Unrestricted General Fund revenue to support district-wide central administrative services (e.g. finance, human resources, performance management, instructional services, legal services, district leadership).
 - c. Third, paying the following services to schools:
 1. Special Education



2. Custodial and Buildings & Grounds
3. School Police & School Security Officers
4. School Nurses
5. School Counselors
 6. Specified Enrichment Resources (i.e. summer school, music, art)
5. Allocate to schools all remaining Unrestricted General Fund revenue based on the projected student enrollment of each school, including allocating a differential amount of revenue to schools based on the number of students enrolled at each school who:
 - a. Are in elementary schools, middle schools, and high schools
 - b. Qualify for the Federal Free & Reduced Price Meals Program
 - c. Are English Learners
 - d. Are in Foster Care
 - e. Reside in high-stress neighborhoods

1/15/14



2017-18 Request to Appeal Base Teacher FTE Allocation

Explanation The base staffing formula is designed by OUSD leadership to provide an equitable base of classroom teachers all schools based on contracted class size maximums and state class size regulations. However, due to special programs or enrollment configuration, some schools may not be able to provide a base program with the number of teachers determined by the formula. This form must be completed in order to appeal the number of centrally-funded base teachers allocated to a school.

- Instructions**
1. After reviewing the base staffing allocation on your FTE Budget Worksheets, please complete all sections of this form to request additions to your centrally-funded base teacher allocation.
 2. Submit the completed form to your Network Superintendent, who will schedule an in-person meeting to review your appeal.
 3. Upon full approval, the Budget Development Tool will be updated and during your session you will receive a budget worksheet reflecting your adjusted staffing.

Why are you requesting an appeal?

School Level	Program Requiring Additional Teacher FTE	Description of Program Need (not met by formula)	Number of FTE requested
6-8 or 6-12	Middle School Electives	School is unable to provide one elective class for each middle school student.	
9-12 or 6-12	A-G course offerings	School is unable to provide full A-G course offerings for each high school student.	
TK-5 or TK-8	Bilingual	School has a bilingual program that is too small to generate enough teachers to meet maximum class sizes.	

Justification *For your in-person meeting, please prepare:*

- ☐ A draft master schedule demonstrating how your classes would be configured with and without the additional teacher(s) you are requesting. Be sure to show the class sizes or number of teacher contacts without the additional teacher(s).
- ☐ Details or other information about the size and needs of the student population that will not be served if the additional teacher FTE is not allocated.
- ☐

Review

Signature		Yes	No	Reason
Network Supt				
Chief of Schools				
SBO/ CFO				

Budget Use Only

Entered Adj in 1-pager tool	By: Date:	1-pager re-generated	By: Date:	1-pager emailed to Principal & FA	By: Date:
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2017-2018 Request to Adjust Base Labor Staffing Formula for

School Site Name _____

Explanation

The base staffing formula is designed by OUSD leadership to provide an equitable base program to all schools. However, some schools may have core program staffing that varies from the formula but still meets minimum functional requirements. There are three types of adjustments you may request.

Type of Request	Notes
Increase: Use discretionary dollars to purchase additional positions.	Positions are budgeted and charged at average cost
Increase or Decrease: Trade positions within the base labor allocation.	e.g. reduce Other Classified FTE to increase Attendance FTE
Decrease: Eliminate or reduce base labor allocation for cash.	

Instructions

- After reviewing the base staffing allocation on your one-pager, please complete all sections of this form to request changes within your base staffing allocation.
- Submit the completed form to your Network Superintendent, who will review and forward to HR and Budget leadership for approval.
- Upon full approval, you will receive a revised one-pager reflecting your adjusted staffing and the remaining balance of base discretionary dollars available.

What adjustment are you requesting?

Position Type	Allocated FTE from one-pager	Increase by	Decrease by	Remaining FTE after adjustment
Teacher				
Principal				
Assistant Principal				
General Clerical				
Attendance				
Noon Supervision				
Other Classified				

For requests to increase:

Please describe how you plan to pay for necessary operational expenses with your remaining dollars.



For requests to decrease:

Please describe how you plan to complete all required functions with remaining staff allocation.

Are you seeking to eliminate or reduce a currently filled position? ____ Yes ____ No

List the position title(s) and the affected employee(s) here:

UPC: _____

EMPLOYEE NAME: _____

EMPLOYEE ID: _____

Review

Signature		Yes	No	Reason
Network Supt				
HR				
Budget				



Commonly Purchased Positions by Type, Average Costs for 2017-2018

The table below shows the average costs, including salaries and benefits, for positions purchased with base resources. If a site chooses to purchase additional FTE using base discretionary funding, the site budget will be charged according to the below figures. Conversely, if a site chooses to reduce a base funded position, the below figures indicate the amount of cash that will be newly available in their base discretionary budget.

Position Type	17-18 Avg. Cost
Teacher	\$92,363
Principals	\$163,715
Assist. Principals	\$133,269
General Clerical	\$89,901
Attendance Clerk	\$57,557
Noon Supervisors	\$28,031
Other Clerical	\$57,717

The table below shows the positions included in each Position Type category. For more information regarding the salary and minimum requirements for these positions and others, please contact your assigned Staffing Analyst in the Talent department.

ATTENDANCE	NOON SUPERVISOR
ATTENDANCE CLERK	NOON SUPERVISOR
STUDENT ATTENDANCE COMPLIANCE OFFICER	OTHER CLASSIFIED
GENERAL CLERICAL BILINGUAL	COMMUNITY ASSISTANT
ADMINISTRATIVE ASSISTANT I (BILINGUAL)	COMMUNITY ASSISTANT BILINGUAL
ADMINISTRATIVE ASSISTANT II (BILINGUAL)	COMMUNITY RELATIONS ASSISTANT I
ADMINISTRATIVE ASSISTANT III (BILINGUAL)	COMMUNITY RELATIONS ASSISTANT II
CLERK BILINGUAL	COMMUNITY RELATIONS ASSISTANT I BIL
GENERAL CLERICAL	COMMUNITY RELATIONS ASSISTANT II BIL
ADMINISTRATIVE ASSISTANT I	EXTENDED DAY SITE LIAISON
ADMINISTRATIVE ASSISTANT II	CASE MANAGER
ADMINISTRATIVE ASSISTANT III	OUTREACH CONSULTANT
RECEPTIONIST	PROGRAM MANAGER COMMUNITY SCHOOL
CLERK	INSTRUCTIONAL ASSISTANT (BILINGUAL)
CLERK INTERMEDIATE	INSTRUCTIONAL ASSISTANT K-12
CLERK ELEMENTARY SMALL	INSTRUCTIONAL ASSISTANT-COMPUTER OPERATOR
CLERK ELEMENTARY LARGE	TECHNICAL SKILLS ASSISTANT
SECRETARY ELEMENTARY SMALL	INTERVENTION SPECIALIST
SECRETARY ELEMENTARY LARGE	PE ATTENDANT
SECRETARY MIDDLE	LIBRARY CLERK
SECRETARY HIGH	LIBRARY CLERK SENIOR
OFFICE MANAGER	TEXTBOOK CLERK
	SCHOOL TREASURER



Direct Service Agreement Forms

The menu presented below is meant to provide an understanding of the direct services currently being offered by the district, and to provide transparency around the associated cost and funding sources for each of the offerings. For the fiscal school year 2017-2018, school sites can order direct services from OUSD Service Areas by using funds available at your school site. As you complete your RBB session, consider how much money to set aside to purchase optional services.

Central Support Sites offering direct services:

- **Custodial Services-** Centrally-allocated custodians will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff
- **Health Services (Nurses)**
- **Community School Program Manager**
- **School Security Officers** – Centrally-allocated SSOs will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **Restorative Justice Coordinators**
- **Counselors-** Centrally-allocated counselors will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **AAMA Facilitators**
- **Psychologist** Centrally-allocated psychologist will be provided to some school site campuses. However, any OUSD school site can provide additional resources to hire additional staff.
- **Mental Health**
- **Family Literacy**

Please note: OUSD school sites are required to complete a direct service agreement form for every direct service that they wish to receive.

Other Services: (do not require service agreements)

- Postage (5724) – Fund as needed
- Duplication Services (5716) - Fund as needed
- Food Services(5758) – Fund as needed
- B&G Work Orders (5720) – Fund as needed



Service Agreement Form Counseling Services (Object 5732)

"Caring for students in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: To exceed OEA obligations central office will provide base counseling services at a level targeted from District-wide obligation of 500:1 based on number of students , grade 7 -12. To supplement and/or request additional counselling services, please complete this form and allocate funds in object code 5732.

CONTACT: Susanna Ramirez, Executive Officer, Susanna.ramirez@ousd.K12.CA.US

FUNDING OPTIONS: Schools may use General Purpose (GP) or Discretionary, Concentration and/or Measure G1 funds to fund Counseling services

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase a Counselor

☐ **Counselor: (0.25 FTE)**
Price: \$24,791 Resource: _____ Org Key: _____

☐ **Counselor: (0.50 FTE)**
Price: \$49,582 Resource: _____ Org Key: _____

☐ **Counselor: (0.75FTE)**
Price: \$74,3723 Resource: _____ Org Key: _____

☐ **Counselor: (1.0 FTE)**
Price: \$99,164 Resource: _____ Org Key: _____

TRACKING INFORMATION:

Principal Signature: _____

School Site Financial Analyst Signature: _____

Network Deputy/Superintendent: _____

Counseling Services: _____



Service Agreement Form Custodial Services (Object 5721)

"Optimizing the educational environment in support of academic achievement"

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the recommended level of custodial services prior to completing this form. If you would like to appeal your recommended allocation, please complete this form and submit it to your FA.

CONTACT: Roland Broach, Executive Director of B&G. Roland.Broach@ousd.org (x8352)

FUNDING OPTIONS: Schools may use General Purpose (GP) only to fund regular custodial allocations (5721). Prop 49/ASES may fund of up to \$1,500 (5731) to cover custodial overtime expenses during the after-school program. DO NOT USE object code 2220 for after school overtime of the day custodian. Also note that supplies and materials for the after-school program are not included in this amount.

SERVICE OPTIONS:

☐ **Yes!** I agree to the recommended level of service for my site indicated on the Custodial Services Recommended Level of Service Spreadsheet

☐ **No.** I would like to appeal my recommended level of service. I believe that the recommended level of service is not correct for my site for the following reasons:

Appeal Rationale:

Here are the changes I would like to request:

- ☐ **Additional Service**
I wish to increase my service from _____ FTE to _____ FTE
- ☐ **Reduced Service**
I wish to decrease my service from _____ FTE to _____ FTE
(A plan to ensure my site is clean and the OUSD Cleaning Standards are met is **REQUIRED** - OUSD Cleaning Standards are posted on the Site Deliverables and Documents intranet site)
- ☐ **Reduced Square Footage**
Please reduce the square footage that custodial services is required to clean. Reduce my square footage from _____ sq feet to _____ sq feet
- ☐ **Community Cleanup Campaign**
I understand that the custodians assigned to my site will not be asked to clean the following rooms during regular hours.
Summary of plan:
- ☐ **Other Conditions**
I guarantee that the custodians assigned to my site will not be asked to clean the following rooms during regular work hours:

TRACKING INFORMATION:

FTE Total: _____ School Org Key: _____

Principal Signature: _____

Network Deputy/Supt Signature: _____

Financial Analyst Signature: _____

Executive Director, B&G Signature: _____



Service Agreement Form School Security Officer (Object 5741)

"Optimizing the educational environment in support of academic achievement"

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the Central Funded SSO allocation prior to completing this form. If you would like to order additional FTE, please complete this form and submit it to your FA.

CONTACT: Jeff Godown, Chief of Police. Jeff.Godown@ousd.org (x3679)

FUNDING OPTIONS: Schools may use Base Discretionary, Concentration and/or Supplemental dollars to fund a School Site Security Officer –SSO in object code (5741). Prop 49/ASES may fund overtime expenses during the after-school program use object code 2225.

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase a School Site Security Officer at the following level of coverage:

☐ **1.0 FTE School Site Security Officer**
Price: \$61,119 Resource: _____ Org Key: _____

☐ **.80 FTE School Site Security Officer**
Price: \$48,895 Resource: _____ Org Key: _____

☐ **.75 FTE School Site Security Officer**
Price: \$45,839 Resource: _____ Org Key: _____

☐ **.50 FTE School Site Security Officer**
Price: \$30,560 Resource: _____ Org Key: _____

☐ **2.0 FTE School Site Security Officer**
Price: \$122,238 Resource: _____ Org Key: _____

TRACKING INFORMATION:

FTE Total:

School Org Key:

Principal Signature:

School Site Financial Associate Signature:

Network Executive Officer Signature:

Police Services Authorization:



Service Agreement Form Technology Services (Object 5737)

“Caring for student technology advancement in support of academic achievement”

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: Technology Services provides a variety of technology support services directed at maintaining overall. These services include

CONTACT: Susan Beltz, Deputy Chief of Technology Services. Susan.Beltz@ousd.org

FUNDING OPTIONS: Schools may use Base Discretionary dollars to pay for Computer Technician services. .

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase additional Technology support, above and beyond the minimum coverage already provided by the central office.

- ☐ **Computer Technician: ½ Day Each Week (0.1 FTE)**
Price: \$8,945 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 1 Day Each Week (0.2 FTE)**
Price: \$17,891 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 1½ Days Each Week (0.3 FTE)**
Price: \$26,836 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 2 Days Each Week (0.4 FTE)**
Price: \$35,782 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 2½ Days Each Week (0.5 FTE)**
Price: \$44,727 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 3 Days Each Week (0.6 FTE)**
Price: \$53,673 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 3½ Days Each Week (0.7 FTE)**
Price: \$62,618 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 4 Days Each Week (0.8 FTE)**
Price: \$71,564 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 4½ Days Each Week (0.9 FTE)**
Price: \$80,509 Resource: _____ Org Key: _____
- ☐ **Computer Technician: 5 Days Each Week (1.0 FTE)**
Price: \$89,455 Resource: _____ Org Key: _____

TRACKING INFORMATION:

Principal Signature:

Network Signature:

Financial Analyst Signature:

Technology Signature:



Service Agreement Form Adult and Career Education, 2017-18 (Object 5751)

School Name: _____ Site Number: _____ Principal Name: _____

School Year: _____

OVERVIEW: Support for Family Literacy Programs.

CONTACT: Chandra Kendrix, Administrative Staff Support, Adult and Career Education.
chandra.kendrix@ousd.org (273-2367)

FUNDING OPTIONS: Schools may use Base Discretionary Unrestricted funds for GED and Family Literacy instruction. Schools may also use Title I funds for ESL Family Literacy instruction.

SERVICE OPTIONS:

☐ **Yes!** I agree to subsidize the Adult and Career Education instructional services for my site in implementing the District's strategic plan for Full Service Community Schools:

School Org Key 1: _____ Amount: _____

School Org Key 2: _____ Amount: _____

TRACKING INFORMATION:

Principal Signature/Date: _____

School Site Financial Analyst Signature/Date: _____

Network Leadership Signature/Date: _____

Office of Accountability Signature/Date: _____

Adult and Career Education Coordinator: Signature/Date: _____



Service Agreement Form Psychological Services (Object 5734)

"Caring for student health in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: In addition to mandated special education assessment, School Psychologists can provide a variety of mental health and behaviour intervention services directed at promoting the social-emotional functioning of students. Such services include student counselling (group/ individual), crisis support, consultation with staff and parents regarding student behavioural interventions, coordination of and participation in SST/504 meetings, and implementation of class/ and school- wide social-emotional learning programs.

CONTACT: Valerie Lopes, Coordinator. Valerie.Lopes@ousd.org (x3718)

FUNDING OPTIONS: Schools may use Base Discretionary, Concentration and/or Supplemental dollars, or Title I funding source to pay for psychological services.

SERVICE OPTIONS:

- ☐ **Yes!** I would like to purchase additional psychological prevention/intervention services, above and beyond the mandated minimum coverage already provided by the central office.
- ☐ **School Psychologist: ½ Day Each Week (0.1 FTE)**
Price: \$12,130 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 1 Day Each Week (0.2 FTE)**
Price: \$24,260 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 1½ Days Each Week (0.3 FTE)**
Price: \$36,389 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 2 Days Each Week (0.4 FTE)**
Price: \$48,520 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 2½ Days Each Week (0.5 FTE)**
Price: \$60,649 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 3 Days Each Week (0.6 FTE)**
Price: \$72,778 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 3½ Days Each Week (0.7 FTE)**
Price: \$84,908 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 4 Days Each Week (0.8 FTE)**
Price: \$97,038 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 4½ Days Each Week (0.9 FTE)**
Price: \$109,437 Resource: _____ Org Key: _____
- ☐ **School Psychologist: 5 Days Each Week (1.0 FTE)**
Price: \$121,297 Resource: _____ Org Key: _____

TRACKING INFORMATION:

Principal Signature: _____

Psychology Coordinator Signature: _____

~~School Site Financial Analyst Signature: _____~~

~~Network Signature: _____~~



Service Agreement Form Mental Health Intern (Object 5739)

"Optimizing the educational environment in support of academic achievement"

School Name: _____

Site Number: _____

Principal Name: _____

OVERVIEW: Mental Health Interns are deployed to school sites to provide classroom intervention; professional development for staff; individual, group, and family counselling services; and case management.

CONTACT: Barbara Mc Clung, Director of Behavioral Health Initiatives, Barbara.McClung@ousd.org

FUNDING OPTIONS: Schools may use General Purpose (GP), Discretionary and/or Concentration funds to fund the Mental Health Interns

☐ Yes! I am interested in purchasing the services of a Mental Health Intern for the 2017—2018 school year.

I am interested in purchasing:

☐ Standard Service Package

Price: \$18,000/school. Object Code: 5739. Resource: _____ Org Key _____

☐ No. I do not plan to purchase the services of a Mental Health Interns for the 2017—2018 school yr.

☐ I am simply not interested.

☐ I would really like to purchase this service, but I do not have sufficient funds available in the appropriate resources. The maximum I could pay is: _____

Total Amount Ordered: \$ _____

School Resource/Org Key & Object Code _____ Amount: _____

_____ Amount: _____

Principal Signature: _____

School Site Financial Associate Signature: _____

CSSS Department Signature _____



Service Agreement Form Restorative Justice Facilitator (Object 5736)

"Optimizing the educational environment in support of academic achievement"

School Name:

Site Number:

Principal Name:

OVERVIEW: Please review the recommended level of restorative justice services prior to completing this form. If you would like to appeal your recommended allocation, please complete this form and submit it to your FA.

CONTACT: Barbara McClung, Director of Behavioral Health. (Barbara.McClung@ousd.org) (415) 533-3709

FUNDING OPTIONS: Schools may use General Purpose (GP), Discretionary and/or Concentration funds to fund restorative justice services

SERVICE OPTIONS:

☐ Yes! I am interested in purchasing the services of a Restorative Justice Facilitator for the 2017—2018 school year.

I am interested in purchasing:

☐ 1.0 FTE Standard Service Package

Price: \$116,712/school. Object Code: 5736. Resource: _____ Org Key _____

☐ 0.5 FTE Partial Service Package

Price: \$58,356/school. Object Code: 5736. Resource: _____ Org Key _____

☐ *Restricted Service Package

Price: \$10,000/School Grant funded middle and high schools **ONLY**.

object Code: 5736. Resource: _____ Org Key _____

☐ No. I do not plan to purchase the services of a Restorative Justice Facilitator for the 2017 – 2018 school year.

☐ I am simply not interested.

☐ I would really like to purchase this service, but I do not have sufficient funds available in the appropriate resources. The maximum I could pay is: _____

Total Amount Ordered: \$ _____

School Resource/Org Key & Object Code _____ Amount: _____

_____ Amount: _____

Principal Signature: _____

School Site Financial Analyst Signature: _____

~~CSSS Department Signature: _____~~



Service Agreement Form AFRICAN AMERICAN MALE ACHEIVEMENT (Object 5733)

"Caring for student health in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: Program to accelerate the achievement of African American Male students in all facets.
The ultimate purposes to create learning conditions engage, encourage and empower African American Male students

CONTACT: Christopher Chatmon, Deputy Chief of Equity, phone number 510-287-8313

FUNDING OPTIONS: Schools may use General Purpose (GP) or Discretionary and/or Concentration funds to fund African American Male Achievement direct services.

SERVICE OPTIONS:

☐ **Yes!** I would like to purchase African American Male Achievement.

- | | |
|--------------------------|---|
| ☐ | AAMA Facilitator: (0.25 FTE)
Price: \$23,091 Resource: _____ Org Key: _____ |
| ☐ | AAMA Facilitator: (0.50 FTE)
Price: \$46,182 Resource: _____ Org Key: _____ |
| ☐ | AAMA Facilitator: (0.75FTE)
Price: \$69,273 Resource: _____ Org Key: _____ |
| ☐ | AAMA Facilitator: (1.0 FTE)
Price: \$92,364 Resource: _____ Org Key: _____ |
-

TRACKING INFORMATION:

Principal Signature:

School Site Financial Analyst Signature:

Deputy Chief/AAMA Director:



Health Services (Object 5735)

"Caring for student health in support of academic achievement"

School Name: _____ Site Number: _____ Principal Name: _____

OVERVIEW: Health Services provides a variety of medical support services directed at maintaining overall student health. These services include screening for vision and hearing, providing diabetes support, and acting as a part or full time school nurse for your school site.

CONTACT: Barbara Parker, Director of Health Services. Barbara.Parker@ousd.org (x2357)

FUNDING OPTIONS: Schools may use Base Discretionary, Concentration and/or Supplemental dollars, or Title I funding source to pay for health services. Nurses paid from Title I funding can only provide supplemental services over and above the state mandated minimum, which must still be provided by a GP funded nurse.

SERVICE OPTIONS:

0 Yes! I would like to purchase additional nursing services, above and beyond the mandated minimum coverage already provided by the central office.

- | | | | |
|----------|--|------------------|-----------------------|
| 0 | SchoolNurse: %DayEachWeek(0.1FTE) | | |
| | Price: \$10,437 | Resource: | Org Key: _____ |
| 0 | SchoolNurse:1DayEach Week(0.2FTE) | | |
| | Price: \$20,875 | Resource: | Org Key: _____ |
| 0 | School Nurse: 1 "hDays EachWeek (0.3 FTE) | | |
| | Price: \$31,312 | Resource: | Org Key: _____ |
| 0 | SchoolNurse:2DaysEach Week(0.4FTE) | | |
| | Price: \$41,750 | Resource: | Org Key: _____ |
| 0 | School Nurse: 2% Days Each Week (0.5 FTE) | | |
| | Price: \$52,187 | Resource: | Org Key: _____ |
| 0 | SchoolNurse:3DaysEachWeek(0.6FTE) | | |
| | Price: \$62,624 | Resource: | Org Key: _____ |
| 0 | School Nurse: 3% Days Each Week (0.7 FTE) | | |
| | Price: \$73,062 | Resource: | Org Key: _____ |
| 0 | SchoolNurse:4DaysEach Week(0.8FTE). | | |
| | Price: \$83,500 | Resource: | Org Key: _____ |
| 0 | School Nurse: 4% Days Each Week (0.9 FTE) | | |
| | Price: \$93,937 | Resource: | Org Key: _____ |
| 0 | School Nurse: 5 Days Each Week (1.0 FTE) | | |
| | Price: \$104,374 | Resource: | Org Key: _____ |

TRACKING INFORMATION:

Principal Signature:

Network Signature:

Financial Analyst Signature:

Health Srvs Signature:



ALLOWABLE EXPENSE TABLES



2017-18 Guidelines for School Site Level Investments with Local Control Funding Formula (LCFF) Supplemental and Concentration (S & C) Funds

LCFF Supplemental(0002) & Concentration(0003) funds are to be used to improve outcomes of English Learners, Foster Youth, and Low Income Students. This year, OUSD school S & C funds need to target one of three action areas within the LCAP:

- English Language Learner Support (LCAP Goal 4)
- Reading Acceleration (LCAP Goal 3) and/or
- Social Emotional Learning (LCAP Goal 2)

Important: If a site would like to fund a support or program that is not listed in the Guidelines, there is a S & C Approval process. Click [here](#) for a description of the process.

S & C DOLLARS

MUST BE SPENT IN THE FOLLOWING 3 AREAS ONLY:

ALLOWABLE

English Language Learner Support

Staff in Support of ELLs:

- Class size reduction

(LCAP Action Area 2.7)

- ELL-focused CCTL

(LCAP Action Area 3.2)

- Academic mentors / instructional assistants

(LCAP Action Area 4.3)

- Bilingual teacher recruitment

(LCAP Action Area 2.4)

- Stipends for ELL focused Teacher Leader, ELL Ambassador, or LTEL Ambassador

(LCAP Action Area 4.1)

Extended Learning for ELLs

- Summer school focused on language development

(LCAP Action Area 1.5)

- After/before school enrichment with a language focus

(LCAP Action Area 1.6)

Supplementary Materials for ELLs

- [Supplementary ELD materials & instructional technology](#)

(LCAP Action Area 3.1)

- Classroom library/ leveled books in English and home language



(LCAP Action Area 2.3)

- Imagine Learning licenses

(LCAP Action Area 3.1)

Language Program courses and program design (Dual Language, Newcomer, Long Term English Language Learner)

(LCAP Action Area 4.2 or 4.3)

- language program design
- heritage language classes
- LTEL Classes
- Balancing class size to maintain bilingual/Dual Language program model

ELL Family Engagement

(LCAP Action Area 3.3)

- Parent education and engagement
- Translation
- SELLS (Site ELL Subcommittee) support

Professional Learning in Support of ELLs

(LCAP Action Area 4.4)

- Stipends or substitutes to support professional learning (e.g. a teacher-led inquiry group or peer observations)
- Stipends to support instructional planning
- Conferences in support of ELL achievement

II. Literacy (Academic Acceleration)

Tier 1 (first instruction for all)

- High-interest/culturally-relevant books or e-books for Leveled Classroom libraries

(LCAP Action area 2.3)

- Books for classroom library collection and book sets for small group guided reading and literature circles

(LCAP Action area 2.3)

- Funding for Library Staffing (Library/Media Teacher and/or Library Tech position)

(LCAP Action area 3.2)

- Family engagement, incentives, and awards focused on Reading campaigns and achievement

(LCAP Action area 3.3)

Tier 2 (targeted small groups)

- Reading Assessment and Program for Struggling Readers and materials (e.g.



Leveled Literacy Intervention and Fountas and Pinnell BAS Kits and SIPPs), training and/or FTE for CCTL or Intervention Teacher.

(LCAP Action area 3.2)

- Extended day/enrichment for struggling readers to receive small group acceleration

(LCAP Action area 3.2)

- ECCTL (Early Literacy Common Core Teacher Leader focused on TK-1 Literacy)

(LCAP Action area 3.2)

Similar Tier 1 and Tier 2 strategies can be supported by S&C dollars to focus on **Mathematics** and **Science** learning. These include:

- Professional learning activities and student accelerations/interventions by CCTLs;

(LCAP Action Area 3.4)

- Supplementary and intervention instructional materials;

(LCAP Action Area 2.3)

- Extended Day and enrichment activities;

(LCAP Action Area 1.6)

- Family engagement activities, incentives, and awards.

(LCAP Action Area 6.5)

III. Social Emotional Learning

Mills Teacher Scholar Academic/SEL Inquiry Group (K-12)

- Teacher stipends
- 3 substitute days
- Coaching from Mills

(LCAP Action area 2.2)

High Schools:

- **Engaging Schools** curriculum with professional learning and on-site coaching available from Engaging Schools.

(LCAP Action area 2.3)

Middle School:

- **Expeditionary Learning** (current ELA/SEL curriculum) additional SEL coaching and professional learning options available from Expeditionary Learning.

(LCAP Action area 2.2)

- **Caring School Community** Advisory Curriculum available through Center for the Collaborative Classroom.

(LCAP Action area 2.2)

Elementary School:



- **Caring School Community 2nd edition**

Available through Center for the Collaborative Classroom
(LCAP Action area 2.2)

IV. Supporting Students

Counselors: PSAC “high priority” recommendation: Schools will prioritize funding of additional counselors to achieve target of 100 students to every one counselor (100:1).
(LCAP Action Area 1.3)

Restorative Justice Facilitator: Facilitates Restorative Practices for youth and adults with a focus on Tier 1 School-wide supports.
(LCAP Action Area 5.2)

Student Advisor (TSA)

TSA position to support student engagement, student voice, and decision making. The Student Advisor will receive support from CSSS as part of the Student Engagement Efforts.

(LCAP Action Area 5.1)

[DRAFT Student Advisor Job description](#)

Common Core Teacher Leader (TSA)

In 2017-18, the primary goals of the Common Core Teacher Leader (CCTL) position are to raise student achievement dramatically in a specific site-selected content area.

(LCAP Action Area 1.3)

[Roles & Responsibilities Guide](#)



LCFF Supplemental & Concentration DOLLARS
NOT ALLOWABLE

1. Assistant Principals
2. Clerical Positions
3. Copier/Xerox contract
4. Noon Duty
5. Meals
6. Medical supplies
7. Table Cloths
8. Contract for xerox machine
9. T-shirts, pullover hooded sweatshirts
10. Postage stamps
11. Toner ink for printers
12. Batteries
13. Refreshments
14. General school supplies - only if linked directly to student engagement and learning can these funds be used
15. Network Tech – unless working directly with students on intervention programs/activities
16. Desks
17. Furniture
18. Rugs/carpet
19. Walkie Talkies
20. Xerox paper



Measure N Permissible Expenses

The Purpose of Measure N

The Oakland College & Career Readiness For All Act is established to pay for the implementation of a comprehensive approach to high school education in Oakland that integrates challenging academics with career-based learning and real-world work experiences. **This comprehensive approach creates small learning communities of career-oriented pathways**, and offers intensive, individualized support to create the conditions for all students to graduate high school prepared to succeed in college and career.

The Goals of Measure N

- Decrease the high school dropout rate
- Increase the high school graduation rate
- Increase high school students' readiness to succeed in college and career
- Increase middle school students' successful transition to high school
- Reduce disparities in student achievement and student access to career pathways based on race, ethnicity, gender, socioeconomic status, English Learner-status, special needs status, and residency

Permissible Uses of Measure N

Measure N proceeds shall be spent on the following school programs:

- To increase support for students in college preparatory courses in every high school to ensure students are qualified for admission to the University of California and other 4-year university systems, and are prepared to succeed in college
- To provide work-based learning in every high school, including career exploration, career technical education courses, job shadowing, internships, and job certifications
- To reduce the drop-out rate by providing counseling, tutoring, mentoring and other intensive support services to students in danger of not graduating high school
- To provide programs to students transitioning from 8th to 9th grade to prepare them to succeed in high school, and to students transitioning from 12th grade to college prepare them for admission and success in college

In order to expend Measure N funds, the expenditures must meet the 5 criteria below:

1. Be Incorporated in the Measure N Education Improvement Plan that was passed by the Measure N Commission and the OUSD Governing Board.
2. Align to the purpose of the Measure N Initiative outlined above.
3. Logically lead to the Measure N Outcome Goals
4. Be aligned to the permissible uses outlined above.
5. Not supplant existing programs, positions, or expenditures at the school site that were previously supporting the Measure N Goals and Outcomes.

OUSD High Schools Only: Please reference [Proper Justification for Measure N IFAS Requests](#) for examples of justification required when using Measure N funds.



Examples of Permissible Expenses

Planning Grant	Education Improvement Plan (SPSA)
● School Site Visits ● Teacher stipends for planning or implementation of pilot programs ● Stipends for student alumni to participate in planning process ● Stipends for parents ● Pilot programs that promote increased outcomes and may be cornerstones for pathway development ● Planning meetings to address new designs or inquiry	Salaries: ● Teachers salaries for shifts in academic program to provide more support, or acceleration. Benefits: ● Benefits associated with staffing positions outlined above Stipends: ● Teacher stipends ● Stipends for student alumni ● Stipends for parents Staff: ● Student support positions and salaries associated with the accelerations ● Consultants to build out programmatic elements to support career pathways Programs and Support Services: ● Pilot programs that promote increased outcomes that meet the goals of Measure N ● 9th grade summer bridge and support programs ● Other innovative programs that have a proven track record of academic improvement ● Support services for specific student populations that improve their academic outcomes ● Dual enrollment courses and books ● Intervention strategies ● Field trips that are essential to the pathway program of study, CTE courses, project-based learning, etc. Deeper Learning Opportunities: ● Professional development ● Conferences ● School Site Visits ● Meetings ● Supplies and materials



Important Information regarding All Permissible Expenses:

Supplementing vs. Supplanting

Funds from Measure N must be used to supplement (increase the level of services) and not supplant (replace) funds from any sources. Any program activity required by state law, State Board of Education (SBOE) rules, or local board policy may not be paid with these funds. State or local funds may not be decreased or diverted for other uses merely because of the availability of these funds. District and campus personnel must maintain documentation that clearly demonstrates the supplementary nature of these funds.

The supplement, not supplant provision is intended to ensure that services provided under Measure N are in addition to, and not in place of, services that would otherwise be provided to participating students with state and local funds if Measure N funds were not available. In addition, funds can not be used to cover the expenses of programmatic elements, staff salary, and costs that were previously being funded by the school. For example, if a site was providing counseling services through a college access partners in the baseline year, you could not shift that expense over to Measure N in the following year. This would be considered supplanting and is not allowed under the Measure.

Information regarding the Conditions for All Permissible Expenses:

Planning Grant

Expenditures must have a clear connection to the planning process, must support design work that creates the conditions for whole school improvement through career-oriented pathway development and must support the development of a clear logical thru line that will become evident in the Education Improvement Plan (SPSA) that is finalized at the end of the planning year.

Education Improvement Plan (SPSA)

Expenditures must be clearly support and come from the logical thru line that is evident in the Education Improvement Plan (SPSA).

Expenditures should support the Theory of Action, should address the Root Cause Analysis, and should ensure the implementation of the Strategies in order to meet the Goals of your SPSA.

Expenditures should support and align to specific parts of your SPSA to support students and pathway development.

Information regarding the Conditions for Specific Permissible Expenses:

School Site Visits

Although school site visits are an allowable expense, schools that are interested in using Measure N funds for school site visits must ensure that school site visits are for teams to learn about best practices or potential planning activities for student supports, student engagement for specific target populations, specific pathway interest, etc. School site visits must support the deeper learning to better address root causes and challenges.

Teacher Stipends

Teacher stipends are an allowable expense and can be allocated for teachers who are tasked with responsibilities such as developing pathway curriculum, collaboration time, piloting programs and/or student support services, etc. Although teacher stipends are an allowable expense, the *key criteria* is that these tasks and activities must be different than what has been offered before and must provide deeper learning to better address root causes, challenges, the development of the pathway instructional core, and overall pathway development.



Meetings

Providing refreshments and stipends for meetings are allowable expenses and can be allocated for meetings that support developing pathway curriculum, collaboration time, student and family engagement, industry partner engagement, etc. Although refreshments and stipends for meetings are an allowable expense, the key criteria is that these meetings must provide deeper learning and planning to better address root causes, challenges, the development of the pathway instructional core, development of pathway program of study, and overall pathway development. These meetings should be be agendized and have recorded minutes.

Professional Development and Conferences

Measure N funds can be used to support the travel, lodging, and fees for school leadership and staff to attend conferences and other opportunities for professional development. Although this is an allowable expense, the key criteria is that conferences and professional development opportunities attended must be different than what has been offered before and must provide deeper learning to better address root causes, challenges, the strategies being implemented, the development of the pathway instructional core, and overall pathway development.

Fieldtrips

Field Trips are an allowable expense and can be allocated for field trips that support pathway curriculum and projects, project-based learning, pre-pathway exposure, work-based learning, CTE courses and coursework, etc. Funds can be used to cover buses, entrance fees, etc. Although field trips are an allowable expense, the key criteria is that these field trips must be different than what has been offered before and must provide deeper learning to better support the development of the pathway instructional core and contextualized learning for students.

Supplies and Materials

Supplies and materials are an allowable expense and can be allocated for supplies and materials needed for project-based learning, pathway curriculum and projects, CTE courses and coursework, Dual Enrollment courses, advisory, 9th grade summer bridge, etc. Although supplies and materials are allowable expenses, the key criteria is that these supplies and materials must be for opportunities that are different than what has been offered before and must provide deeper learning to better support the development of the pathway instructional core and contextualized learning for students.



Guidelines for Teacher Retention and Middle School Improvement Act (Measure G1)

Measure G1 – Allowable and Unallowable Expenses:

Important note: G1 funds should be used to supplement, not supplant additional services, staff, programs or materials the site would not otherwise have within the following goal areas:

Goals	Allowable Expenses (some examples of expenses)
Increase access to courses in arts, music, and world languages in grades 6-8	Staff (art, music, world language) Instruments Art supplies Language software and teaching aids Professional development
Improve student retention during the transition from elementary to middle school.	Staffing and other resources that will not supplant pre-existing services
Create a more positive and safe middle-school learning environment.	Staffing and other resources that will not supplant pre-existing services

Unallowable Expenses:

- Core Classroom teachers (except art, music, or world language class)
- Clerical Positions
- Copier Contract
- Medical Supplies
- Meals

NOTE: Pre-existing services, programs, staff or materials that meet the Measure G1 goals above are NOT allowable expenses. *The exception being if a site can demonstrate that funds used for a pre-existing program have been eliminated through budget allocation reductions and that no alternative funding source exists.*

Proposal Process Timeline:

Measure G1 allocations presented with 1-pagers (for planning)	February 10, 2017
Measure G1 self-assessment for each of the goal categories	February 10-28, 2017
MS Sites (including any site with a 6-8 grade configuration) develop Measure G1 grant proposals	February 10-28, 2017
Measure G1 Commission establishment by Board of Education	February 22, 2017



Submit Measure G1 grant proposals Network team for approval prior to Lock-in Session	February 28, 2017
Sites include recommended G1 Grant proposal expenditures in BDT during lock-in sessions	March 1 – 13, 2017
Site Grant proposals presentation to Measure G1 Commission	April 17 - 21, 2017
G1 Commission notifies MS Network of proposals being recommended to Board	May 5, 2017
Approved Measure G1 grant funding loaded in site budgets	July 1, 2017

Sites must complete a diagnostic self-assessment of the school's curricular and safety needs, including an assessment of community demand for arts, music, and language education.

Use of G1 funds should prioritize gaps in the categories identified as a result of the self-assessment.

The following types of data will need to be provided as evidence along with the proposal for services and programs:

Art - Self assessment

Music - Self assessment

World Language - Self assessment

Elementary to Middle School retention - Enrollment data and analysis

Safe and Positive School Culture - Culture SPF data: URF, Suspensions, CHKS

Decisions to eliminate funding for existing services, staff, programs or materials in order use Measure G1 funds is considered supplanting and are not allowable.

- During Lock-in session your FA will load your proposed 2017-18 Measure G1 budget into the Budget Development Tool and lock-in with the proposed budget;
- Measure G1 Commission will review grants proposals and make a recommendation to the Board for approval;
- IF APPROVED: Proposed Measure G1 budget will be locked-in and adopted in the 2017-18 budget.
- IF NOT APPROVED: Measure G1 budgets will be reallocated to surplus (4399) and adopted in the 2017-18 budget. Adjustment to the Measure G1 budget will not be allowed in 2017-18 until after the Measure G1 Commission approves the site's grant proposal.

If you have additional questions please contact Mark Triplett mark.triplett@ousd.org or Linda Pulido-Esquivel linda.esquivel@ousd.org.



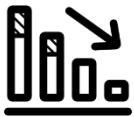
Call for Quality Schools Funds 2017-18

NOTE: These funds are not for ongoing operational school expenses, including general supplies, contracts or activities not directly related to this initiative. Funds must be used for approved expenses. Funds may not be transferred across programs. Funds must be expended by June 30, 2018. Call for Quality Schools funding is not included within Budget 1-Pagers, but is instead allocated following a thorough allocation of base, supplemental, concentration, and relevant measure dollars, to ensure these funds are not supplanting ongoing dollars.

In a continued effort to support quality school development, we are investing in supporting strategic school leaders and their school communities to pursue strategies to build programs that truly meet the diverse needs of our Oakland students and families. To this end, and in accordance with Board policy 6005 Quality School Development, the district has allocated funds to Intensive Support Schools and for other identified highest-need schools. These funds are intended to expand the capacity to support schools aligned to School Performance, School Site Planning, and addressing persistent underperformance and school design challenges.

These funds are explicitly meant ONLY for activities related to the different stages of continuous school improvement and school transformation:

- Assess Context, Program, and School Performance (including SPF)
- Conduct School Quality Review (SQR)
- Community Outreach and Engagement
- Building Capacity of Instructional Leadership Team (ILT) and Parent Teams
- Exposure to Great Schools
- Visioning & Pre-Planning
- Design Thinking & Cycles of Inquiry
- Transformation Plan
- On-site Transformation/Design Plan Implementation Assistance
- Progress Monitoring of Key Plan Elements
- Accelerated programing and intervention



Funding allocation is contingent on a year-by-year basis. Once selected and the plan is approved, sites receive a per pupil allocation (based ONLY on Final Enrollment Projections), with 100% allocation for the first year, and decreasing allocations each subsequent year up to three years. For this reason, funds should be used to build capacity and supplement, not supplant the core program. In addition, these funds CANNOT be used to replace an Appeal. Schools must plan with the expectation that these funds will not be ongoing.

Schools identified through the *Call for Quality Schools* process in SY 2015-16 and SY 2016-17 have already been identified and notified. Funds must be allocated in accordance with your articulated plan and will be reviewed and approved by your Network Superintendent and the Office of Continuous School Improvement. Schools that were designated as in the Engage & Explore phase for SY 2016-17 and invited to complete a Transformation Plan will receive funding as the plan has been approved.

- Subs - Teacher, Principal



- Travel Expenses
- Translation
- Child care
- Meeting Refreshment
- Extended contract – OUSD staff
- Conference Attendance
- Materials / Curriculum
- Contracted Services Related to Building Capacity of ILT or Transformation/Design Plan
- FTE related to Implementation of Transformation/Design Plan that are **NOT ongoing**

For budget planning advisement, please contact your Network Superintendent or Pablo Villavicencio at pablo.villavicencio@ousd.org.



LOCK-IN SESSION CHECK-LIST

All Principals must have the following check list forms during the budget lock-in session:

- Network Supt. Approval Worksheet
(Position FTE and Non Salaries)
- Proof of School Site Council (SSC) Agenda
- Service Agreement Form (completed)
- Appeal Forms
- Trade Forms
- Budget Development Worksheet
- Staff Roaster or Master Scheduling



CONTACTS



TOOLS

Budget Development Tool Log-in	Katema Ballentine	Katema.ballentine@ousd.org
Budget Worksheets	Linda Wu	Linda.Wu@ousd.org
SPSA Tool	Diana Sherman	Diana.sherman@ousd.org

FACTORS

LCFF Percentages	Peter Bugno	Peter.bugno@ousd.org
Z Scores	Jean Wing	Jean.wing@ousd.org
SPF Factor	David Montes	David.montes@ousd.org

PROCESS

Appeals	Network Leadership	Network Leadership
Adds/Trades	Network Leadership	Network Leadership
Cost Projections	Financial Analyst	Financial Analyst
Staffing Inquiries	HR Staffing Analyst	HR Staffing Analyst
Strategic Planning	Network Leadership	Network Leadership

PROGRAMS

Concentration Fund Compliance	Lisa Spielman	Lisa.spielman@ousd.org
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