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OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

LABOR MANAGEMENT & EMPLOYEE RELATIONS

To: Board of Education

From: Jacqueline Minor, General Counsel, Troy Christmas, Director, Labor Strategy *J.C.*

Meeting Date: June 26, 2013

Subject: **OUSD-UAOS Tentative Agreement regarding Compensation for 2012-13**

Action Requested: Adoption of Tentative Agreement for one-time pay adjustment for 2012-13.

Summary: On June 6, 2012, the District and United Administrators of Oakland Schools (UAOS), representing certificated and classified administrators, reached a Tentative Agreement regarding a one-time pay adjustment of 2.35% of base salary for the 2012-13 school year.

Recommendation: Adoption of Tentative Agreement regarding a one-time pay adjustment for the 2012-13 school year.

Fiscal Impact: General Purpose Fund

Attachments:

- AB 1200 letter of approval from County Office of Education
- Tentative Agreement

OUSD/UAOS Tentative Agreement 2012-13 Compensation

Agreement

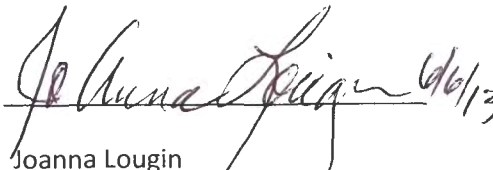
1. For the 2012-13 fiscal year only, the District proposes a one-time lump sum payment to UAOS members of 2.35% of base salary.
2. The parties will continue existing active negotiations for a successor agreement.
3. If any represented/unrepresented employee group and/or bargaining unit receive a wage increase during FY 2012-13, District agrees to negotiate a wage increase for UAOS represented bargaining unit employees.

Background (For Information Only)

- The District and UAOS are in active negotiations for a successor collective bargaining agreement.
- The District has set aside \$6 million of one-time funds for compensation to all employees
- UAOS' portion of the \$6 million translates in to a one-time compensation increase of 2.35% of base salary.

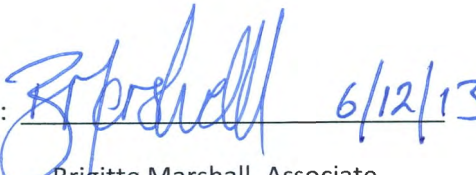
UNITED ADMINISTRATORS OF OAKLAND SCHOOLS

OAKLAND UNIFIED SCHOOL DISTRICT


By:  6/6/13
Joanna Lougin

By:  6/12/13
Troy Christmas, Director Labor Strategy

By:  6/6/13
Wendi Caporicci

By:  6/12/13
Brigitte Marshall, Associate
Superintendent Human Resources


David Kakimiba, President
Board of Education


Edgar Rakestraw, Jr., Secretary
Board of Education

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

Name of Bargaining Units: SEIU, BCTC, UAOS, AFSCME, OEA, Bargaining Units; and Non Representative Groups,
Confidential and Individual Contract Certificated X Classified X

The proposed agreement covers the period beginning 07/01/2012 and ending 06/30/2013

and will be acted on by the Governing Board at its meeting on 06/26/2013

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action.

A. Proposed Change in Compensation

Compensation	Annual Cost Prior to Proposed Agreement FY 2012-2013	Fiscal Impact of Proposed Agreement		
		Year 1 Increase/(Decrease) FY 2012-2013	Year 2 Increase/(Decrease) FY	Year 3 Increase/(Decrease) FY
1. Salary Schedule (This is to include Step & Column, which is also reported separately in item 6)	\$ 307,991,082		\$ -	\$ -
		0.00%	0.00%	0.00%
2. Other Compensation Stipends, Bonuses, Longevity, Overtime Differential, Callback or Standby Pay, etc.		\$ 4,864,726	\$ -	\$ -
		1.58%	0.00%	0.00%
2a. Description of Other Compensation ONE TIME BONUS - 2.35%		\$ 4,864,726	\$ -	\$ -
3. Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.	\$ 72,818,233	\$ 1,154,577	\$ -	\$ -
		1.59%	0.00%	0.00%
4. Health/Welfare Plans	\$ -	\$ -	\$ -	\$ -
		0.00%	0.00%	0.00%
5. Total Compensation - Add Items 1 through 4 to equal 5	\$ 380,809,315	\$ 6,019,302	\$ -	\$ -
		1.58%	0.00%	0.00%
6. Step & Column - Due to movement plus any changes due to settlement. This is a subset of item No. 1.	\$ -	\$ -	\$ -	\$ -
7. Total number of represented Employees (Use FTEs)	0	4,078.29	0	0
8. Total Compensation Average Cost per Employee	\$ -	\$ 1,476	\$ -	\$ -
		0.00%	0.00%	0.00%

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

The negotiated One Time Bonus percentage of 2.35% for fiscal year 2012-2013 is for employees who are members of the following bargaining units, UAOS, SEIU, OEA, BCTC, AFSCME; and non-representative groups, confidential and Individual contract. The computation of the 2.35% One Time Bonus is based on each individual employee annual salary, effective June 14, 2013.

However, the AB1200 Form calculated percentage reflects a percentage of 1.58% on line 2 above, this calculation is result of the sum of all of the employees's varying full time equivalent (FTE's) factors who are less than 1.00FTE

10. Were any additional steps, columns or ranges added to the schedules? (If yes, please explain.)

NO

11. Please Include comments and explanations as necessary. (If more room is necessary, please attach additional sheet.)

N/A

B. Proposed Negotiated Changes in Non-compensation Items (e.g. class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

N/A

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

N/A

D. What Contingency Language is Included in the Proposed Agreement (e.g. reopeners, etc.)?

N/A

E. Will this Agreement Create, Increase, or Decrease Deficit Financing in the Current or Subsequent Year(s)?

"Deficit Financing" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

NO

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F. Identify Other Major Provisions that do not Directly Affect the District's Costs; such as Binding Arbitration, Grievances Procedures, etc.

N/A

G. Source of Funding for Proposed Agreement

1. Current Year

All costs of the 2.35% One Time Bonus are funded by the General Fund, General Purpose for the 2.35% One Time Bonus

2. If this is a single year agreement, how will the ongoing cost of the proposed agreement be funded in subsequent years (i.e., what will allow the district to afford this contract)?

One Time Bonus

3. If this is a multiyear agreement, what is the source of funding, including assumptions used, to fund these obligations in subsequent years? (Remember to include compounding effects in meeting obligations.)

Not a multiyear agreement, one time bonus funding source unrestricted General Fund Balance

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H. Impact of Proposed Agreement on Current Year Operating Budget (Ed. Code 42142)

	Column 1 Latest Board- Approved Budget Before Settlement <i>As of: 1/31/2013</i>	Column 2 Cost of Adjustments as a Result of Settlement	Column 3 Other Revisions Costs Increases (Decreases)	Column 4 Total New Budget (Col 1+2+3)
Revenues				
Revenue Limit Sources (8010-8099)	\$ 176,595,554	\$ -	\$ -	\$ 176,595,554
Remaining Revenues (8100-8799)	\$ 86,285,812	\$ -	\$ -	\$ 86,285,812
Total Revenues	\$ 262,881,366	\$ -	\$ -	\$ 262,881,366
Expenditures				
1000 Certificated Salaries	\$ 99,751,814	\$ 3,372,013	\$ -	\$ 103,123,827
2000 Classified Salaries	\$ 37,133,401	\$ 1,492,713	\$ -	\$ 38,626,114
3000 Employee Benefits	\$ 59,340,232	\$ 1,154,577	\$ -	\$ 60,494,809
4000 Books and Supplies	\$ 9,390,710	\$ -	\$ -	\$ 9,390,710
5000 Services and Operating Expenses	\$ 17,938,930	\$ -	\$ -	\$ 17,938,930
6000 Capital Outlay	\$ 58,650	\$ -	\$ -	\$ 58,650
7000 Other Outgo	\$ 3,744,977	\$ -	\$ -	\$ 3,744,977
Total Expenditures	\$ 227,358,714	\$ 6,019,302	\$ -	\$ 233,378,016
Operating Surplus (Deficit)	\$ 35,522,652	(\$6,019,302)	\$ -	\$ 29,503,350
Other Sources and Transfers In	\$ (34,176,787)	\$ -	\$ -	\$ (34,176,787)
Other Uses and Transfers Out	\$ (1,000,000)	\$ -	\$ -	\$ (1,000,000)
Current Year Increase (Decrease) In Fund Balance	\$ 345,865	(\$6,019,302)	\$ -	\$ (5,673,437)
Beginning Balance	\$ 32,869,087			\$ 32,869,087
Current Year Ending Balance	\$ 33,214,952	(\$6,019,302)	\$ -	\$ 27,195,650
Components of Ending Balance				
Nonspendable and Restricted 9711-9740	\$ 150,000	\$ -	\$ -	\$ 150,000
Reserved for Economic Uncertainties 9789 (3%)	\$ 12,498,067	\$ 0.00	\$ -	\$ 12,498,067
Committed and Assigned 9770-9780	\$ 20,566,885	(\$6,019,302)	\$ -	\$ 14,547,583
Unassigned/Unappropriated 9790	\$ -			\$ (0)

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If the total amount of the adjustment in Column 2 on page 4 does not agree with the amount of the Total Compensation Increase in Section A, line 5, page 1 (e.g. increase was partially budgeted), explain the variance below:

Please include any additional comments and explanations of page 4 as necessary:

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Public Disclosure of Collective Bargaining Agreement
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I. **Impact of Proposed Agreement on Current Year Unrestricted Reserves**

1. State Reserve Standard

a. Total Expenditures, Transfers Out, and Uses (Page 4, Column 4, total Expense & Other Uses and Transfers Out) <i>(Must include restricted and unrestricted expenditures)</i>	\$ 234,378,016
b. State Standard Minimum Reserve Percentage for this District	3.00%
c. State Standard Minimum Reserve Amount for this District (For districts with less than 1,001 ADA, this is the greater of Line a. times Line b. or \$50,000.	\$ 7,031,340

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

a. General Fund Budgeted Unrestricted Reserve for Economic Uncertainties	\$ 7,031,340
b. General Fund Budgeted Unrestricted Unassigned/Unappropriated Amount	\$ 20,164,310
c. Special Reserve Fund 17-Budgeted Reserve for Economic Uncertainties	\$ -
d. Special Reserve Fund 17-Budgeted Unassigned/Unappropriated Amount	\$ -
e. Article XIII-B Fund 72-Budgeted Reserve for Economic Uncertainties	\$ -
f. Article XIII-B Fund 72-Budgeted Unassigned/Unappropriated Amount	\$ -
g. Total District Budgeted Unrestricted Reserves	\$ 27,195,650

3. Do unrestricted reserves meet the state standard minimum reserve amount? YES ___ X ___ NO _____

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

OAKLAND UNIFIED School District
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Revised MYP Including the Effects of Collective Bargaining

District Name: OUSD			
General Fund			
Multi-Year Projections			
Budget Year: 2012-2013			
	34,493	ADA:	ADA:
	3.24%	COLA:	COLA:
	77.728%	Deficit:	Deficit:
<u>Revenues</u>	Year: 2012-2013	Year:	Year:
Revenue Limit Sources	176,595,544		
Federal Revenue	69,999		
Other State Revenue	60,540,712		
Local Revenue	25,675,101		
Total Revenue	262,881,356	0	0
<u>Expenditures</u>			
Certificated Salaries	99,751,814		
Step & Column Adjustment			
Cost-of-Living Adjustment			
Other Adjustments			
Classified Salaries	37,133,401		
Step & Column Adjustment			
Cost-of-Living Adjustment			
Other Adjustments			
Employee Benefits	59,340,232		
Books & Supplies	9,390,710		
Services, Other Operating Exp	17,938,930		
Capital Outlay	58,650		
Other Outgo	8,951,416		
Direct Support/Indirect Costs	(5,206,439)		
Total Expenditures	227,358,715	0	0
Operating Surplus (Deficit)	35,522,641	0	0
Other Financing Sources & Transfers In(Positive figure)	(34,176,787)		
Other Financing Uses & Transfers Out (Neg Figure)	(1,000,000)		
Current Yr Inc(Dec) in Fund Balance	345,855	0	0
Beginning Fund Balance	32,869,087		
Audit Adjustments/Restatements			
Ending Balance	33,214,942	0	0
Restricted Balance	20,566,885		
Required Reserve	12,498,067		
Unrestricted Balance (Incl Revolving)			
Comments (Major changes):			

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J. Salary Notification Requirement

The following section is applicable and should be completed when any Salary/Benefit Negotiations are settled after the district's final budget has been adopted.

Comparison of Proposed Agreement to Change in District Base Revenue Limit

(a) Current Year Base Revenue Limit (BRL) per ADA: (obtain from the FY 2012-2013 County Office-provided Revenue Limit or+B263 Form RL, Line 3	<u>\$ 6,711.37</u> (Estimated)
(b) Prior Year Base Revenue Limit per ADA: (Form RL, Line 1)	<u>\$ 6,499.37</u> (Actual)
(c) Amount of Current Year Increase: (a) minus (b)	<u>\$ 212.00</u>
(d) Percentage Increase in BRL per ADA: (c) divided by (b)	<u>3.26%</u>
(e) Indicate Total Settlement Percentage Increase from Section A, line 5, Page 1 for current year	<u>1.58%</u>

K. Certification

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

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

 District Superintendent (or Designee)
 (Signature)

6/28/13

 Date

After public disclosure of the major provisions contained in this summary, the Governing Board, at its meeting on **JUNE 26, 2013**, took action to approve the proposed Agreement with the **SEIU, BCTC, UAOS, AFSCME, OEA, Bargaining Units; and Non Representative Groups, Confidential and Individual Contract**

 President (or Clerk), Governing Board
 (Signature)

6/28/13

 Date

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