

OFFICE OF THE BOARD OF EDUCATION

1000 Broadway, Suite 680

Oakland, CA 94607-4099

ousd.org/boe | boe@ousd.org

510.879.8199 w | 510.879.2299 f | 510.879.2300 TTY/TDD

**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

BOARD OF EDUCATION 2018**Aimee Eng**, President, District 2aimee.eng@ousd.org**Jumoke Hinton Hodge**, Vice President, District 3jumoke.hintonhodge@ousd.org**Jody London**, District 1jody.london@ousd.org**Nina Senn**, District 4nina.senn@ousd.org**Roseann Torres**, District 5roseann.torres@ousd.org**Shanthi Gonzales**, District 6shanthi.gonzales@ousd.org**James Harris**, District 7james.harris@ousd.org

To: OUSD Board of Directors
From: Shanthi Gonzales, Chair, Budget & Finance Committee
Date: March 7, 2018
Re: Justification for a Budget Analyst Position/Function

This memo details the reasoning for creating a Budget Analyst position that reports to the Board of Directors, in part or in whole. I look forward to hearing feedback from the board on these points.

1. Part of the challenge in providing the level of financial oversight the community expects of the board is the persistent lack staff capacity to respond to board member information requests. The result of this lack of capacity is that board members do not have sufficient information to provide adequate oversight for the district's finances. Having a staff member whose job it is to respond to board information requests related to the district's finances will provide the necessary capacity on staff. Part of the challenge in providing the level of financial oversight the community expects of the board is the persistent lack staff capacity to respond to board member information requests.

2. Another challenge is that there is no training provided or available in house to board members on OUSD's finances. While we are encouraged to seek outside training, my experience is that the outside training available is not very helpful because it is not specific to Oakland, is provided outside of our context and is not timely or salient to the issues that come up periodically in Oakland. Part of the role of the Budget Analyst would be to work with board members to build expertise in OUSD's finances and budget, which is critical to our success in providing adequate oversight, and would be especially helpful during a board member's first and second years on the board. This position would also assist in maintaining a consistent focus on making budget documents more accessible and user-friendly, and bringing best practices to OUSD from other school districts.

3. The board has adopted many policies and resolutions intended to support stronger oversight of OUSD's finances, but does not yet have strong systems to ensure that newly-adopted policies are implemented with fidelity, and that there is timely, accurate reporting out from staff about the successes and challenges of implementation. Without such support, it is difficult to ensure that the board's will is being carried out. Hiring a Budget Analyst will provide some additional staff capacity to help board members to track the implementation of board-adopted policies.

4. There have been persistent staffing shortages for support of OUSD's board and citizen committees, including critical committees such as the Audit Committee, which frustrates committed citizen volunteers who cannot get questions answered, and prevents them from fulfilling their oversight roles.

OUSD Board of Directors

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We need additional staff capacity to staff board committees with voter mandates to oversee OUSD expenditures.

5. There are hundreds of board policies on the books, however most board members do not have a deep familiarity with the vast majority of these policies, which represent the direction that we have provided to staff in order to govern the district. We need additional staff capacity to help board members familiarize themselves with the policy tools currently available, and to identify and draft needed policies based on emerging issues.

I believe strongly that as the district is currently staffed, it is not possible or reasonable for the Board of Directors to provide the level of oversight Oakland community needs and deserves.

Should the board elect NOT to move forward with the creation of the Budget Analyst position, I strongly recommend directing the Superintendent to draft and implement a plan to address these concerns immediately.

Legislative File

File ID Number: 18-0126
 Introduction Date:
 Enactment Number:
 Enactment Date: By:



**OAKLAND UNIFIED
 SCHOOL DISTRICT**

Position Description

TITLE:	Budget Analyst	REPORTS TO:	Board of Education and Superintendent
DEPARTMENT:	Board of Education	CLASSIFICATION:	Classified Management
FLSA:	Exempt	WORK YEAR/ HOURS	261 days/7.5 hours
ISSUED:	Created:	SALARY GRADE:	\$81,462 - \$113,979

BASIC FUNCTION: Support the work of the governance team, the Board of Education and Superintendent, in executing on identified priorities. Research, analyze and revise policy for the Board of Education related to board-identified policy priorities and change initiatives. Provide ongoing policy and budget guidance, propose budgeting and other policy adjustments aligned to board priorities. Monitor and report on progress on identified board priorities.

REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements).

E = Essential Functions

Board Support (50%)

- Support the work of the board’s Budget & Finance Committee, drafting documents, conducting research, monitoring implementation of board policy and providing updates, and making policy recommendations. E
- Help to build consensus among board members about policy priorities (especially with regard to the district’s finances) and tools to inform the board and monitor the financial status of the district, and help to inform board and Superintendent work plan goals related to financial sustainability.
- Build consensus among board members about shared expectations of finance staff in

- Assist board in long-term planning, annual calendaring and workflow management; help board leadership to plan for important initiatives and work that require coordination of/with the board (such as budget/LCAP development, collective bargaining, staff evaluations). **E**
- Work with Board of Education and Superintendent toward alignment of budget and LCAP development, board policy goals, the Strategic Plan and the board and Superintendent work plans. **E**
- Provide research assistance and support to board members in drafting legislation and policies. **E**
- Assist board members and Superintendent as necessary in formulating alternative budget proposals, aligned to board priorities and work plan. **E**
- Coordinate the evaluation of board initiatives, and assist the board in determining the success of our identified strategies, and assisting the board in changing course when necessary. **E**
- Ensure appropriate training and technical assistance are available to board members and other relevant parties on an ongoing basis on financial, policy and budgetary skills, especially board members in their first time on the Board of Education. **E**
- Provide assistance to Board of Education in achieving annual goals as laid out in the board work plan. **E**

Engagement (15%)

- Coordinate board study sessions related to work plan goals related to the district's budget and financial monitoring, including recruiting and inviting external speakers as necessary. **E**
- Maintain a queue of constituent requests (fiscal and policy requests) for periodic board consideration and discussion, particularly during budget development and work plan prioritization. **E**
- Coordinate with members of relevant bodies such as Budget Advisory Committee, Principal Advisory Committee, and Parent Student Advisory Committee to get input on board policies or needed changes to board policies. **E**
- Coordinate community hearings, topical conversations and issues. **E**
- Build relationships with school sites and district departments to provide regular status reports and proactively address emerging issues. **E**
- Coordinate joint communications from the board to the community. **E**

Research & Communications (10%)

- Assist Board of Education in receiving requested information to inform budget and financial decisions. **E**
- Author policy and issue briefs for the Board of Education and Superintendent about issues of concern or importance to the governance team. **E**
- Provide support to the Board of Education in collective bargaining negotiations. Conduct research, analysis and costing in response to queries from the Board of Education. **E**
- Track trends in education and best practices in other school districts and bring ideas for change to the board. **E**
- Assist in developing periodic communications from the board to the community. **E**

Budget Oversight (25%)

- Review and inform proposed budgets for accuracy and adherence to established board policy and priorities and state and federal compliance guidelines. **E**
- Analyze district budgets and provide major assistance to the Board of Education in monitoring program budgets and making recommendations for budget modifications. **E**

- Report to board regularly regarding trends and areas of concern with regard to budgeted versus actual spending in the school district. **E**
- Stay apprised of all fiscal issues that arise by proactively reaching out to and consulting with relevant colleagues. **E**

- Participate in professional development on a regular basis. **E**
- Perform related duties as assigned. **E**

MINIMUM QUALIFICATIONS:

TRAINING, EDUCATION AND EXPERIENCE:

Five years experience with administrative staff or professional work

Two years experience analyzing and/or developing policies or procedures

Track record of successfully completing projects efficiently and on time

Strong problem solving and organizational skills

Excellent verbal and written communication skills

Master's Degree preferred

Prior California public school district policy and/or fiscal experience preferred

Customer service experience preferred

LICENSES AND OTHER REQUIREMENTS:

Demonstrated skill at policy development

Demonstrated proficiency with computer-based quantitative and tools

Valid California Drivers License

Employment eligibility that may include fingerprints, Tuberculosis and/or other employment clearance

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Policy development and implementation

Public school finance

Budgetary and accounting principles, systems and procedures

Customer services strategies and techniques

Federal and State compliance rules, regulations and policies

ABILITY TO:

Build consensus and negotiate compromises

Work effectively with members of the Board of Education and numerous other stakeholders

Identify and resolve policy and budget problems

Interpret and reconcile data

Consistently meet and/or exceed client expectations.

Establish and maintain effective working relationships with all levels of district staff and other agencies.

Use and leverage relevant technology

WORKING CONDITIONS:

ENVIRONMENT:

Indoor office setting; driving a vehicle to conduct work; fast-paced work

PHYSICAL DEMANDS:

Hearing and speaking to exchange information in person and on the telephone; seeing to read, prepare, and proofread documents, perform assigned duties; sitting or standing for extended periods of time; dexterity of hands and fingers to operate a computer keyboard and other office equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

Non-Discrimination Policy:

The Oakland Unified School District does not discriminate in any program, activity, or in employment on the basis of age, creed, sex, race, ethnic background, marital or veteran status, national origin, disability, sexual orientation, or religion.

**RESOLUTION
OF THE
BOARD OF EDUCATION
OF THE
OAKLAND UNIFIED SCHOOL DISTRICT
Resolution No. 1718-0145**

- Creation of Job Description/Position – Budget Analyst - Department, As Assigned

WHEREAS, the District's budget crisis of the 2016-17 School Year illustrates the need for closer financial oversight on the part of the Board of Education; and,

WHEREAS, one challenge in providing adequate financial oversight is the lack of staff that are responsible for training and supporting the Board in the area of Budget and Finance Policy Governance; and,

WHEREAS, one position – Budget Analyst - have been identified by the Budget and Finance Committee as critical in ensuring that the Board is positioned to better plan for and monitor the District's finances in the future,

NOW, THEREFORE, BE IT RESOLVED that the Board of Education hereby determines that the following position is created as set forth in in the attachments and shall be established on the respective salary schedule/rage effective_____

Creation:

Position Title/FTE

Budget Analyst

(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: Exempt

Range: \$81,462 - \$113,979

12 months, 261 days, 7.5 hours (FT), or as assigned

PASSED AND ADOPTED by the Governing Board of Education of the Oakland Unified School District, this _____by the following vote:

PREFERENTIAL AYE:

PREFERENTIAL NOE:

PREFERENTIAL ABSTENTION:

PREFERENTIAL RECUSE:

AYES:

NOES:

ABSTAINED:

RECUSE:

ABSENT:

We hereby certify that the foregoing is a full, true and correct copy of a Resolution passed at a Regular Meeting of the Board of Education of the Oakland Unified School District held on _____.

Legislative File	
File ID Number:	18-0126
Introduction Date:	
Enactment Number:	
Enactment Date:	
By:	

OAKLAND UNIFIED SCHOOL DISTRICT

Aimee Eng
President, Board of Education

Kyla Johnson-Trammell
Superintendent and Secretary, Board of Education