

Root Cause Analysis of Measure N Carryover



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Current Status of Measure N Carryover

School	Percent of 16-17 Allocation Spent	Carry Over Amount 16-17	Percent of 17-18 Allocation Spent	Carry Over Amount 17-18	Change
Castlemont - 301	92.9%	\$131,521.08	99.3%	\$136,598.77	↑
Fremont - 302	106.4%	\$128,424.92	90.7%	\$195,101.63	↑
McClymonds - 303	73.2%	\$111,902.47	99.9%	\$112,224.54	↑
Oakland High - 304	93.2%	\$150,531.45	104.5%	\$90,821.53	↓
Oakland Tech - 305	93.5%	\$394,635.30	91.8%	\$534,528.89	↑
Skyline - 306	95.1%	\$245,005.88	104.4%	\$179,506.82	↓

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School	Percent of 16-17 Allocation Spent	Carry Over Amount 16-17	Percent of 17-18 Allocation Spent	Carry Over Amount 17-18	Change
Coliseum College Prep - 232	113.5%	\$7,472.19	93.5%	\$22,473.47	↑
Life Academy - 335	62.2%	\$119,207.74	74.7%	\$177,758.87	↑
Madison Park Academy (Upper) - 215	65.6%	\$172,123.08	87.1%	\$219,537.55	↑
MetWest - 338	81.8%	\$41,221.48	88.7%	\$57,009.70	↑
Oakland International - 353	90.7%	\$40,188.62	67.0%	\$143,437.98	↑

Current Status of Measure N Carryover

School	Percent of 16-17 Allocation Spent	Carry Over Amount 16-17	Percent of 17-18 Allocation Spent	Carry Over Amount 17-18	Change
Bunche - 309	36.1%	\$89,082.49	121.1%	\$69,519.36	
Community Day School - 333	87.6%	\$2,357.73	89.6%	\$5,376.67	
Dewey - 310	56.7%	\$113,436.41	88.7%	\$138,943.69	
Rudsdale Continuation - 352	61.2%	\$104,865.91	95.5%	\$111,231.72	
Rudsdale Newcomer - 354	N/A	N/A	41.9%	\$61,777.57	
Sojourner Truth - 330	69.6%	\$78,262.27	62.7%	\$139,806.38	
Oakland Emiliano Street Academy - 313	104.1%	\$3,500	103.6%	\$0	

Root Causes of Measure N Carryover



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Strategic

- Sites used grant funding such as Perkins and Atlantic that they knew would sunset out after the 2017-2018 school year and reserved Measure N funding to sustain key positions and initiatives.
- Sites understood Measure N dollars would carryover for identified costs that occur in the following year that could further support pathway development, while other funding sources were fully spent.



Root Causes of Measure N Carryover

Site Challenges

- Clerical issues at sites prevented some sites from purchases, stipends, and spending of funds from being processed.
- Planned actions sometimes did not take place: planned field trips did not happen, stipends for grade level teams ended up being every two weeks instead of weekly.
- At times, purchases were significantly slowed through a time-consuming justification process and sites used their general funds to spend on needs instead.



Root Causes of Measure N Carryover

Central Freeze

- The budget freeze/reductions obstructed site plans as a whole and when additional limits were placed on spending, there were more processes/extra steps put into place that sites had to go through that was meant to target GP/S&C, but it did impact Measure N spending as well.



Root Causes of Measure N Carryover

Staff Turnover

- Mid-year reductions to clerical staff created transition contexts that left a void in knowledge and thus several invoices unpaid (e.g. Oakland Tech)



Key Shifts and Supports for 2018-19

For the 2018-2019 School Year

- No mid-year site reductions
- Fully-staffed Fiscal Team
- Escape approval process with more sites being trained on how to ensure Measure N spending and justification is clearer.
- School site supervisors are more directly involved with budgets and fiscal processes in partnership with Fiscal Analyst

Key Questions

With the fiscal situation in our district, and knowing central office departments may dramatically be changed, how do we ensure sites are supported to access their funding in the coming years?

How can the approval process in Escape be used to ensure that Measure N justification is in place without additional forms and processes? Can we use some of the features in requisitions, such as the “Notes” field instead of justification forms?

Is there a way for us to load the Measure N carryover funding closer to the time that school budgets are loaded?

Are there any policy shifts in carryover we should consider, given the current fiscal context in our district?

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