



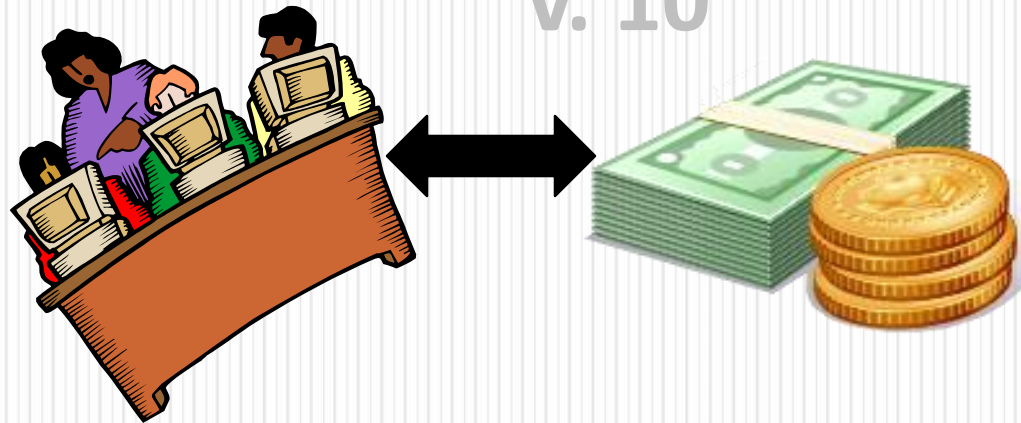
OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

Board Meeting Budgeting for Equity

Wednesday, December 11, 2013

v. 10



I. OVERVIEW & The Global View

The Systemness of Budgeting

Board Questions

- 1. What are the Superintendent's recommended "weighted allocation" formulas for students who are:**
 - a. Free/Reduced Meals Program eligible?**
 - b. English Learners?**
 - c. Foster Youth?**
 - d. Secondary Education students?**
 - e. Students who attend schools located in impacted neighborhoods (i.e. high crime, high poverty, poor health indicators)?**

- 2. Using the adopted 2013-2014 Budget, what is the impact to each school if we allocate \$4.5 million to schools using the "weighted allocation" formulas?**

- 3. Using the adopted 2013-2014 Budget, what is the impact to each school if schools were to budget their personnel expenses based on the district-wide average cost of a teacher?**

Strategic Plan: *Community Schools, Thriving Students*



Vision



Goals

All students, in EVERY school have access to a well-resourced quality school program with additional resources designated to support students with the highest needs aligned with District-wide and school site strategies.

1. Must align our budgeting system to LCFF (Poverty, Foster Youth, ELLs)
2. Address the unique needs of students and programs
3. Include environmental factors as key variables of achieving greater equity in budgeting
4. Account for budgeting decisions by measuring results for student achievement
5. Reduce audit findings; maintain fiscal solvency

The Superintendent has been directed by the Board to:

1. **Modernize budgeting system and align to State Funding System- Local Control Funding Formula** *(Strategic Plan Goal Area 4)*
2. **Support the recruitment, training, retention of great teachers & principals**
3. **Provide enough staffing to support the programmatic vision of school sites in alignment with District policies**
4. **Ensure site-base decision making to meet the unique needs and vision of each community**
5. **Maximize the allocation of resources to achieve greater equity based on student needs**
6. **Improve the central office quality of performance**
7. **Establish a site governance process to guide school planning**

The Whole Pie & Maximizing School Site Allocations

Maximizing Allocation to School Sites

- *State Loan*
- *Charter Pass Through*
- *Adult Ed. Transfer*

***** Funding that is taken off the top – before it reaches us (percentage varies)**

TOTAL AMOUNT GOING TO OUSD after the “Taken Off the Top”

4%
\$10.4M

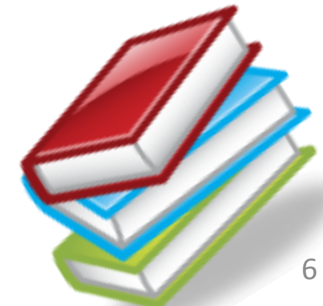
86%
\$226.5M

14%
\$36.7M

Proposed School Site Allocation & Program Services (e.g. Summer School, Counselors, Nurses, etc.)

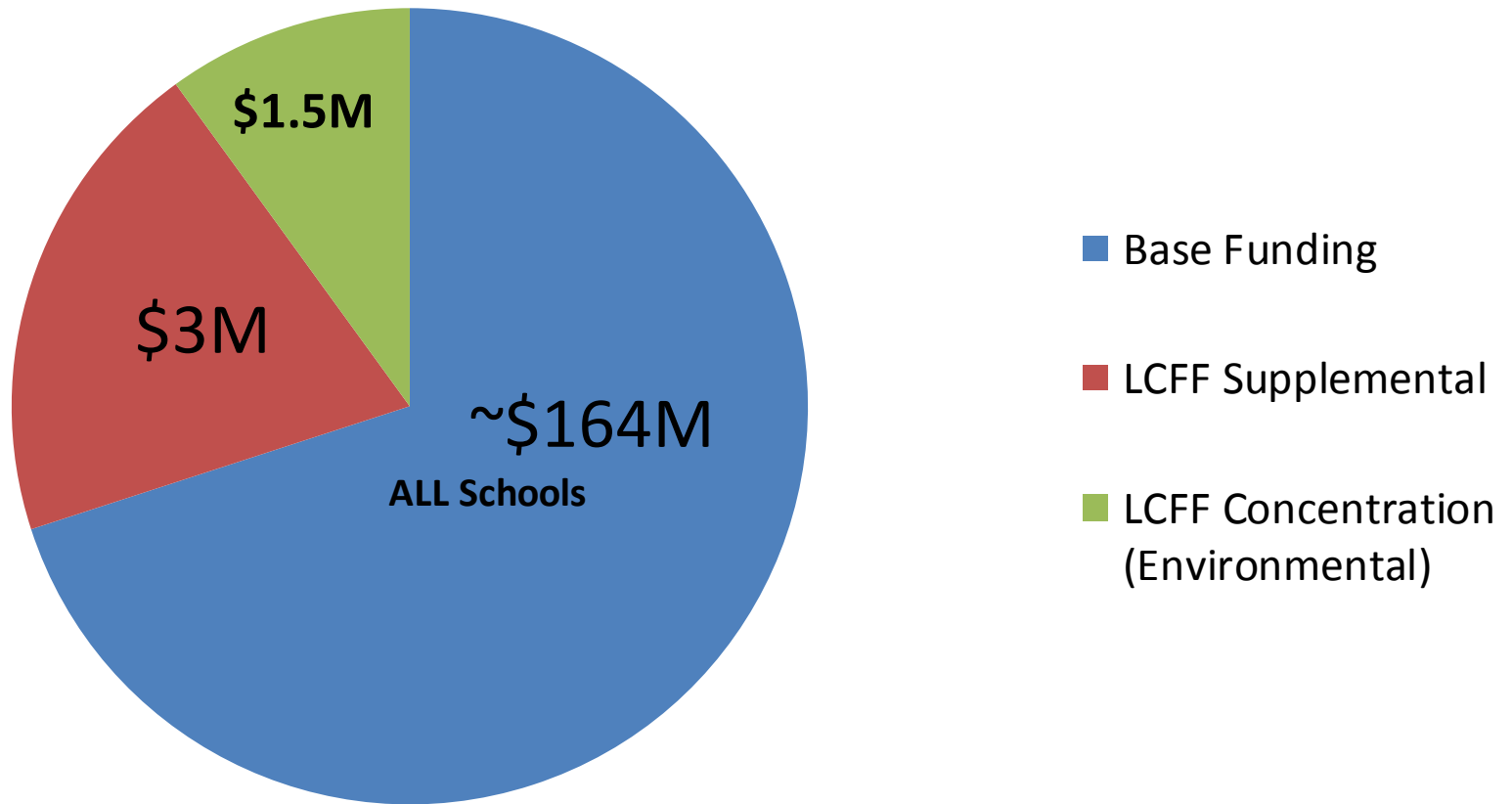
Proposed Central Administration & District-Wide Cost (license fees, parcel tax collection fees etc.)

88% GOAL: To increase allocation to school sites and services over 3 years



B. EXAMPLE MODEL: Equity, Results, and Needs- Based Distribution of

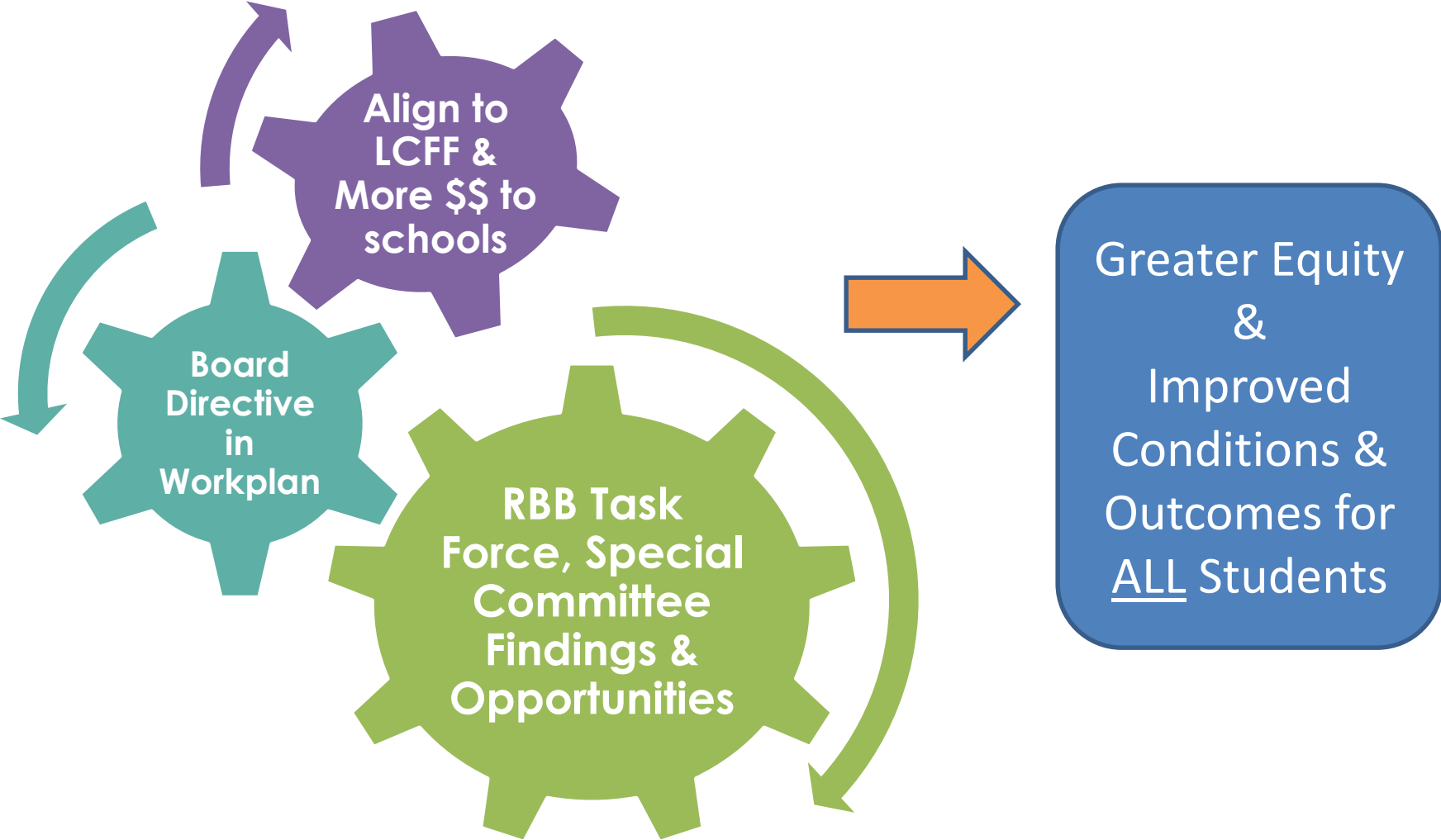
Breakdown of Allocation to Schools (UNRESTRICTED \$ ONLY)



II. Budgeting for Equity

Equity-Based Decision Making

Drivers for Improving the Budget System



What do We Mean by “Inequity?”

RBB Current Reality:



- 36 schools requested balancing Pool funds 2013-14 budgeting year
- 13 of schools met core staffing and program needs, but had less than \$25,000 for the year in discretionary funds
- 48 of schools meet core needs, and have between \$26,000 \$100K or more of discretionary funds
- 17 schools meet core needs, and have over 100K
- Cost of staff becomes a key dependent variable in RBB

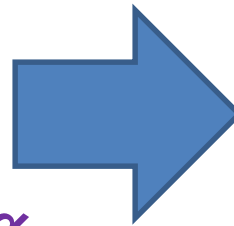
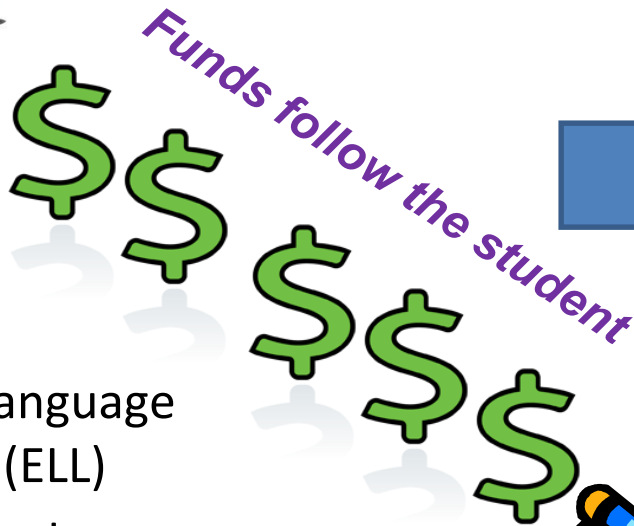
The Problem!!!

There is no relationship between our current funding model and addressing the needs of students in the LCFF categories or schools in high-stress environments.

Our current allocation formula is structurally inequitable, complex, and time intensive.

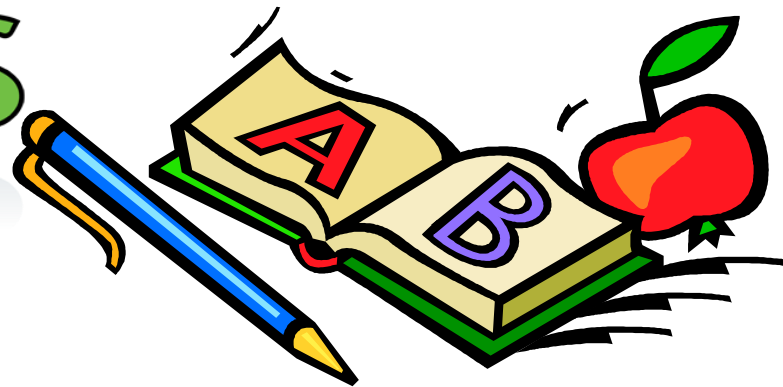
Our current budgeting system is NOT aligned to LCFF targeted populations.

Student Population Factors – LCFF Supplemental



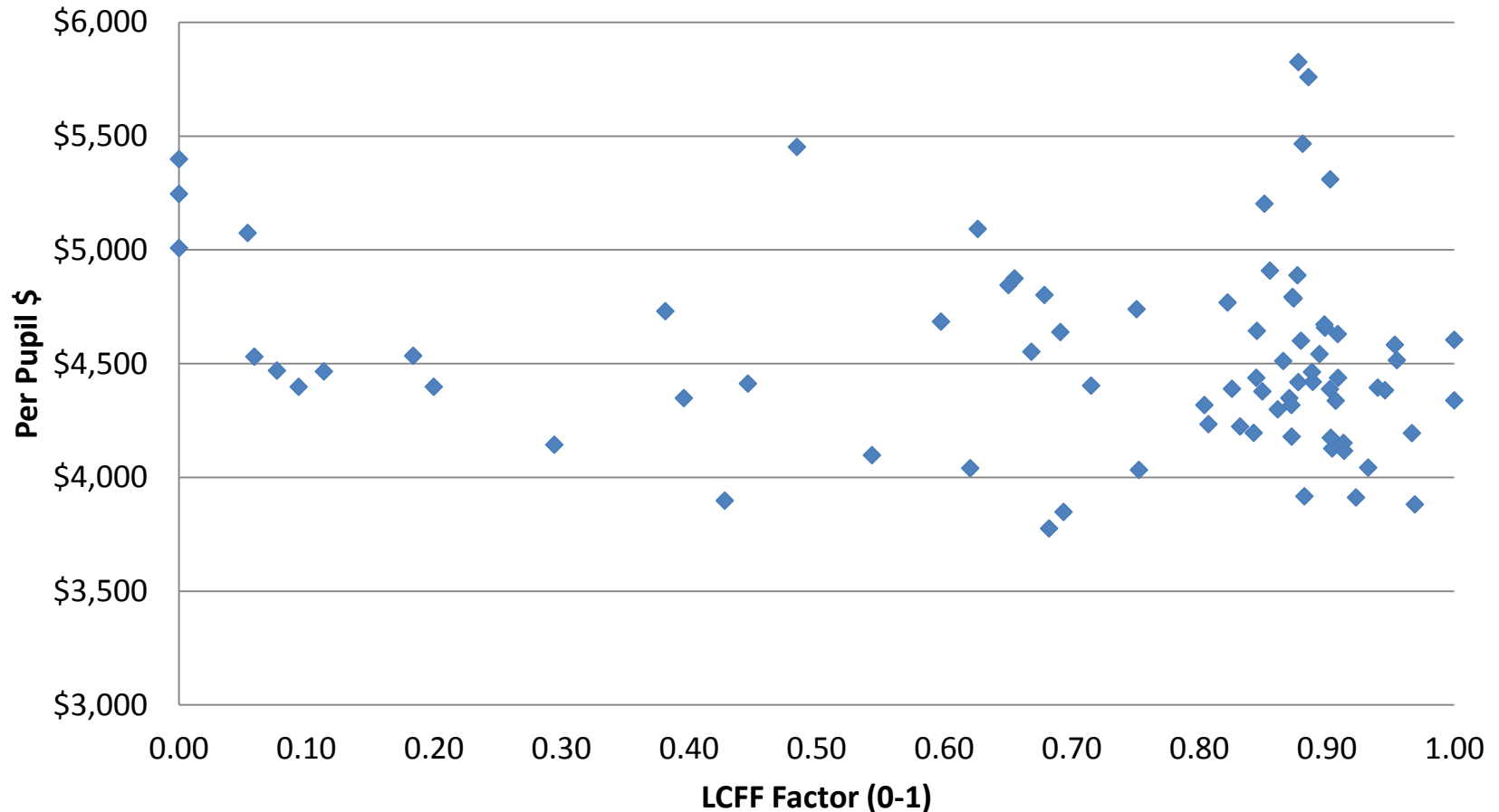
**“LCFF”
Supplemental
FACTOR**

- Poverty
- English Language Learners (ELL)
- Foster Youth



Student Population Factors: LCFF Supplemental

Per Pupil \$ vs. LCFF Factor



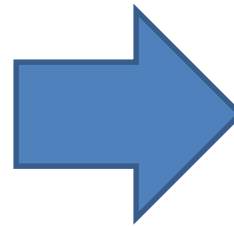
Environmental Factors – Where is my School?

Q: What impact does environment has on student achievement ?



Environmental Factors & Budgeting

- Distance to a high crime or violent area
- Proximity & access to supermarkets
- Median household income
- School proximity and # of liquor stores
- % of asthmatic students
- # of vacant lots/units in the area
- Unemployment rates



**“Z”
SCORE**

**Higher Z Score =
More Stress (RED)**

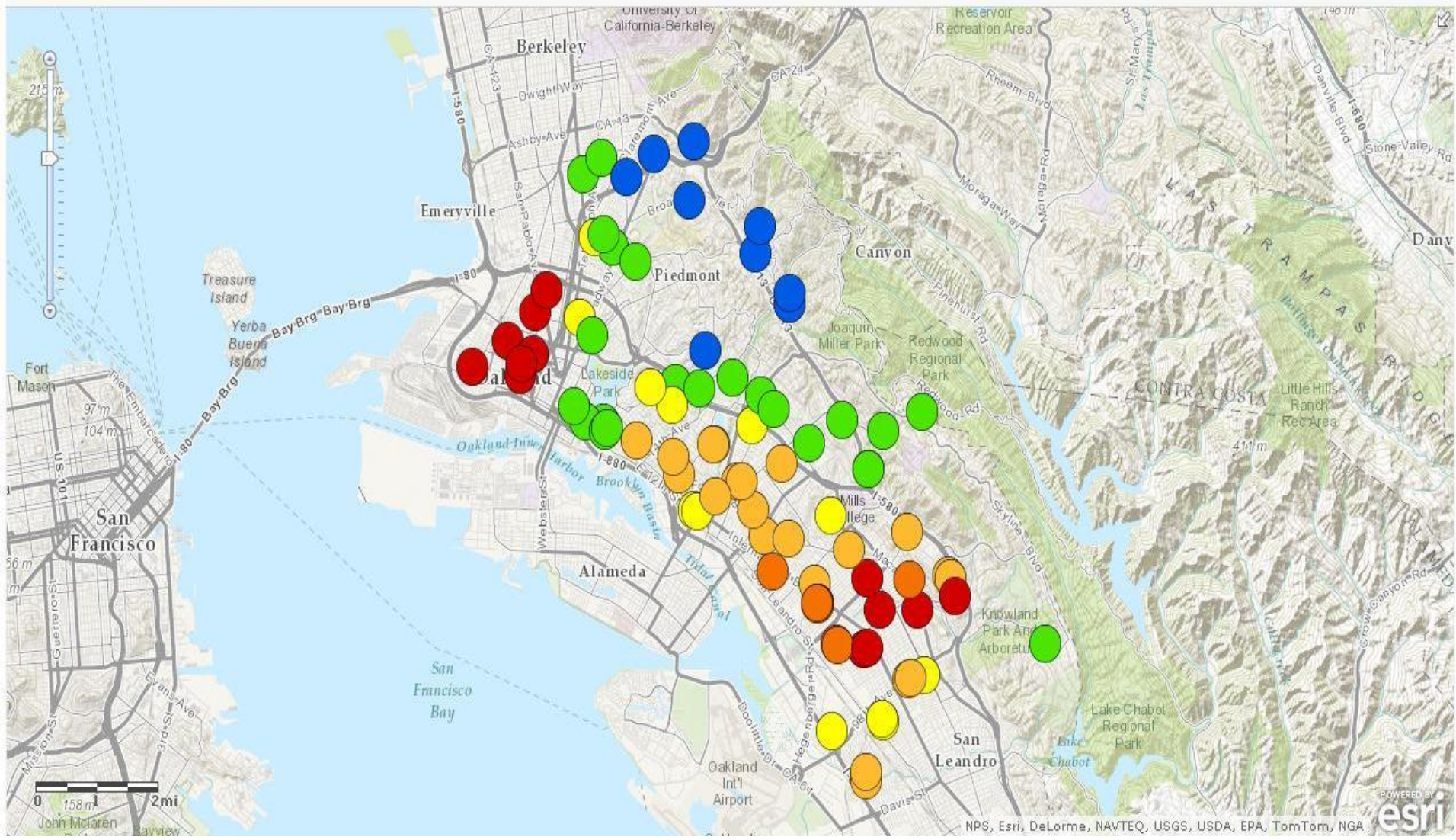
**Lower Z Score =
Less Stress (BLUE)**

ArcGIS - OUSD Environmental Factors Map

NEW MAP

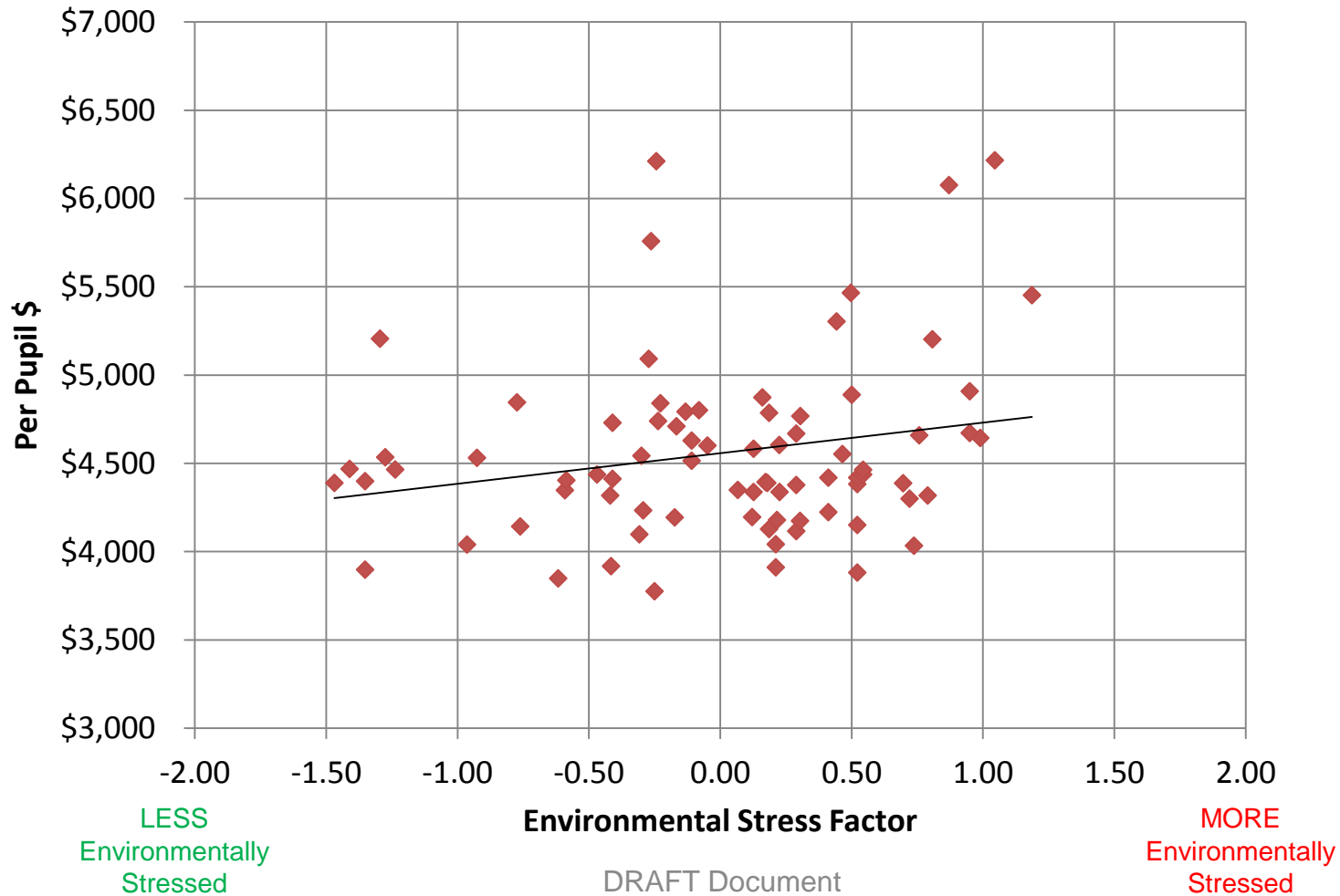
SIGN IN

Details Add Basemap Save Share Print Measure Bookmarks Find address or place



School Environmental Factors: LCFF Concentration

Per Pupil \$ vs. Environmental Stress



IV. WHAT ARE WE TRYING TO ACCOMPLISH?



We are trying to address the multiple structural inequities in our system through refining our budgeting process.

Proposed Changes to RBB

- **Remove ADA% from penalizing school** to provide schools 100% of their total allocation- Use the Balanced Scorecard to evoke urgency and accountability to reduce chronic absences
- **Equality in meeting core program needs through Base allocation of FTE** for all schools as outlined through contractual class-size maximums, LCFF regulations, bargaining unit agreements, a-g board policy requirements & bilingual program requirements
- **Dependable and fixed allocation of unrestricted discretionary funds** for school based decision-making at all schools

Proposed Changes to RBB

- **Equitably distribute supplemental LCFF funds to follow the student at school sites** with student factors in the categories of Poverty, ELLs, and Foster Youth for school based decision making aligned to Local Control Accountability Plan (LCAP)
- **Allocate the LCFF concentration funds to school sites** with environmental factors as outlined though crime, unemployment rates, and food deserts data for school based decision making aligned to LCAP
- **Allocate restricted funds to school sites** to ensure that School Site Councils can utilize these funds for intended purposes towards data-driven interventions and supports above and beyond the base core program, supplemental, and concentration allocations
- **Provide central infrastructural and targeted supports to school sites** by ensuring all school sites leaders can focus on instruction as their primary driver to equity & student achievement

Structural & Endemic Inequities: Challenges & Possible Solutions

Structural Inequity	Possible Solution(s)
Teacher salaries & benefits significantly vary school to school	Remove teacher salary & benefits from the budgeting process; show cost, but do not allow cost to impact sites
Student attendance & chronic absence rates vary school to school impacting ADA% and the percentage of dollars a school receives	Remove ADA% rates penalizing schools; allow schools the 100% of the allocation regardless of ADA%
Schools are located in different environments; the surrounding environment is one of the major factors contributing to achievement differences	Include environmental factors into the budgeting allocation formula; support students in school communities with high rates of environmental factors
Schools vary in size & some schools cannot afford to simultaneously staff their schools and provide the core services	Remove the balancing pool, guaranteed enough staffing to deliver the students' core program
School context varies: elementary, middle & high schools	Provide high schools an additional allocation to interrupt & eliminate the drop-out rates of our students

Equity, Results, and Needs Budgeting System

RESTRICTED funds to address student needs beyond the base requirements

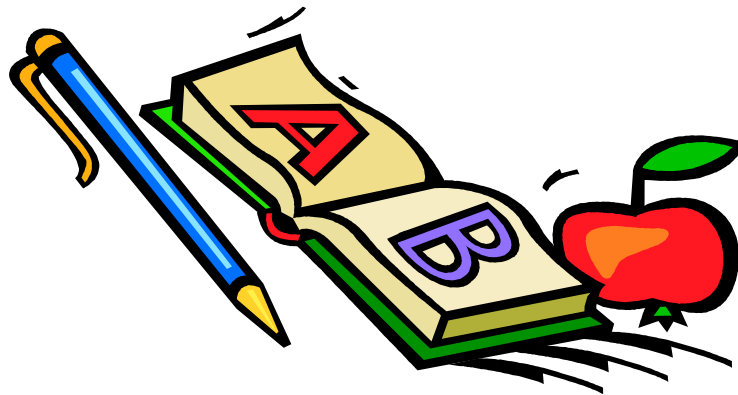
LCFF Concentration funds to address environmental factors; aligned to LCAP

**LCFF Supplemental funds to address ELLs, Poverty, Foster (LCFF Concentration & Supplemental)
Follows the student; aligned to LCAP**

BASE allocation for core program requirements plus fixed discretionary Funds

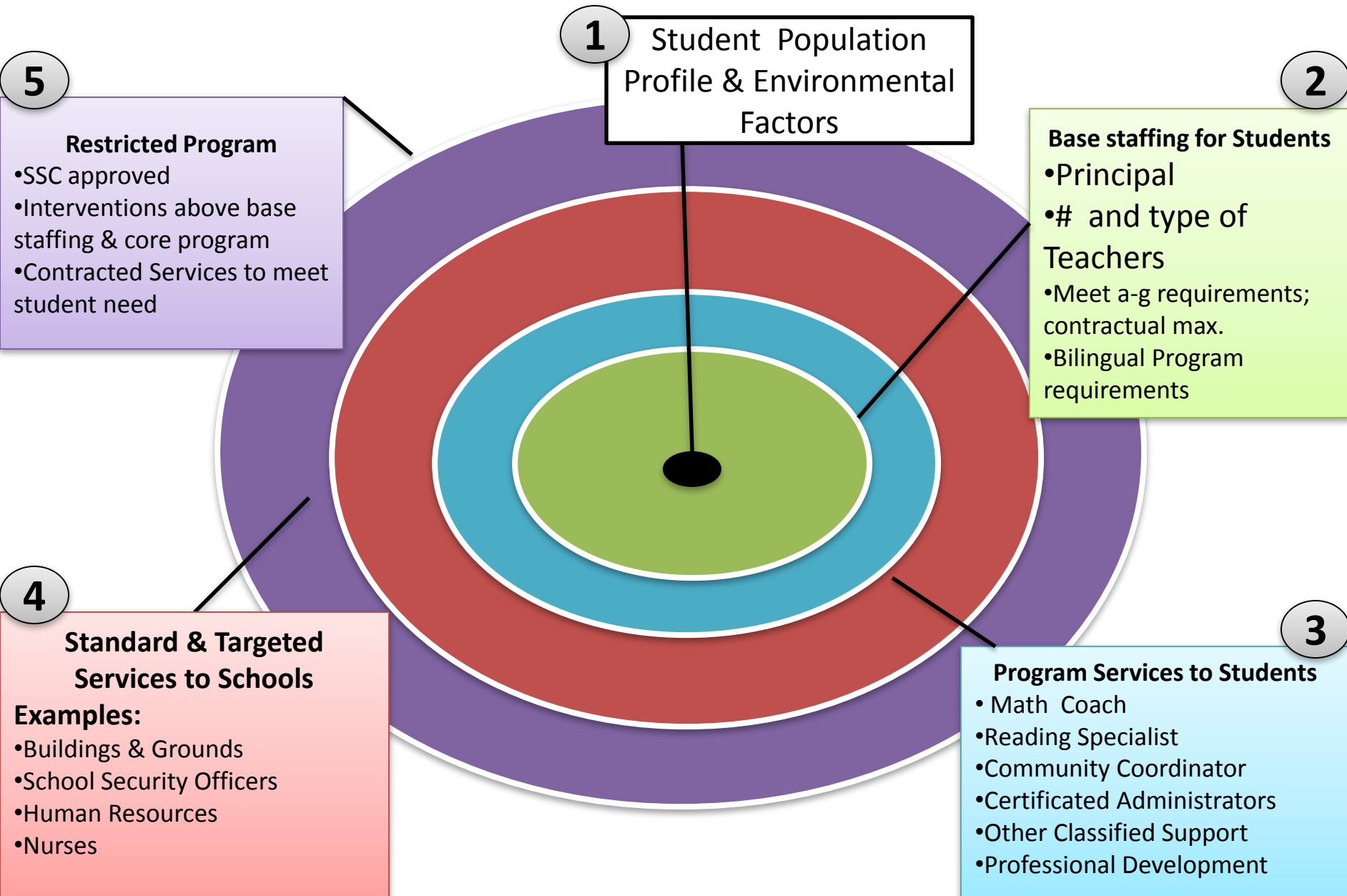
D. School Site Planning & Decision Making

Q: Will my ability to make local decisions about my school community be taken away?



A: NO.

School Site Budgeting & Decision-Making



Who makes the decision about how a school meets their program needs?

Number	Categories	Decision-Maker(s)
1	Student Population Profile & Environmental Factors	School Choice Process
2	Administration-Teachers- based on contract maximums, a-g requirements, bilingual program requirements; Teacher-Administrator Ratios	School & Central Office
3	Program Services to students aligned to CSSSP	School & Community
4	Standard & Targeted Services to schools to support the infrastructure	Central Office
5	Restricted-Categorical Spending Priorities	School + SSC

School by School Budgeting Profiles in the Proposed Budgeting Scenario

V. NEXT STEPS

Phased Implementation Proposal

2014-15 Budgeting Upgrade Recommendations

- Remove ADA% from penalizing schools
- Equality in meeting core program needs through Base Allocation (Eliminate the Balancing Pool)
- Dependable and fixed allocation of unrestricted discretionary funds for all schools
- Equitable Allocation of LCFF funds in alignment to LCAP
- Increase school site allocations & services to 86% (including set aside 1% for targeted allocation to high schools as a District priorities)
- Use gradual class-size progression chart for TK-3
- TK & K @ 24:1, 1st @ 27:1 and 2nd/3rd at 30:1

2015-16 Budgeting Upgrades Recommendation

- Adjust the budgeting tools to Align to Allocation Formulas and criteria
- Create a menu of recommended strategies and interventions for greater results in budgeting for equity
- Ensure LCFF Plan is in alignment to LCAP
- Increase school site allocation and services to 87% (including a set aside 1% for targeted allocation to middle schools as a District priorities)
- Use gradual K-3 class-size progression to 24:1 per LCFF regulations (see attached chart)
- Planning for 2016-17 increased allocation to 88% (including a set aside 1% for targeted allocation to elementary schools as a District priority)

Proposed Gradual Progression to 24:1 Class-size TK-3

Year of gradual shift	TK/K	1 st	2 nd	3 rd
2014-15	24:1	27:1	30:1	30:1
2015-16	24:1	24:1	27:1	30:1
2016-17	24:1	24:1	24:1	27:1
2017-18	24:1	24:1	24:1	24:1

Thank You!!!!

Superintendent, Gary Yee & Staff