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**OAKLAND UNIFIED
SCHOOL DISTRICT**
Community Schools, Thriving Students

Board Cover Memorandum

To Board of Education

From Kyla Johnson-Trammell, Superintendent
Sondra Aguilera, Chief Academic Officer
Diana Sherman, LCAP Coordinator
Johanna Hoffman, COVID Funds Coordinator

Meeting Date February 23, 2022

Subject Discussion: LCAP Supplement, February 2022

Ask of the Board Review the mid-year data collected and the mid-year expenditure report to comment on the progress of implementation of the LCAP Goals and Services since the beginning of the school year, 2021-2022.

Background California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with an increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

Discussion The supplement to the annual update, the mid-year outcome data and the mid-year expenditure and implementation data is provided to the Board in order to discuss the progress of implementing the 2021-2024 Local Control and Accountability Plan (LCAP).

Fiscal Impact Mid-year expenditure report and Budget overview for Parents.

Attachment(s)

- Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan
- LCFF Budget Overview for Parents
- Presentation - LCAP Mid-Year Update

Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Oakland Unified School District	Sondra Aguilera, Chief Academic Officer	sondra.aguilera@ousd.org Office: 510.879.2866

California’s 2021-22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

Proposed uses of the expanded LCFF Concentration funding, which was not included in the LCAP at adoption, align to the 2021-2024 LCAP goals and actions identified as priorities by the Oakland Unified community. As part of the development of the LCAP, Oakland Unified held a total of 52 districtwide committee meetings with parent, student, and community leaders to generate and share feedback for the LCAP, monitor student access to resources, help identify needs, and suggest investments that could best meet the needs of focal student groups and of all students in the pandemic context.

Broadly, the 2021-2024 LCAP engagement process included a combination of district wide and small group meetings and sessions complemented by tools and materials to facilitate participation, share information, and gather feedback. OUSD staff collaborated on the design and implementation of our community engagement process with the following groups:

- Lead Delegates from the LCAP Parent and Student Advisory Committee (LCAP PSAC) and District English Language Learners’ Subcommittee (DELLS)
- Representatives from the Foster Youth Advisory Committee (FYAC)
- Representatives from the Community Advisory Committee for Special Education (CAC)
- Representatives from the Committee to Empower Excellence in Black Students’ Education (CEEBSSE)

- Representatives from the Latino Parent Advisory Group (LPAG)
- LCAP Student Advisors connected to the districtwide All-City Council (ACC)
- Members of Community Based Organizations (including Californians for Justice, Public Advocates, East Bay Community Law Center, and California Youth Connection, among others)

In February 2022, Oakland Unified also engaged the LCAP PSAC around the specific proposed uses of the 2021-22 expanded LCFF Concentration funding and the 2020-21 LCFF Supplemental & Concentration carryover. Community suggestions for this funding included technology support for students and families, job training for parents and other community members to help fill vacant positions in the district, additional investment in fiscal transparency tools for the community, and expanded investment in schools with declining enrollment.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Oakland Unified's planned use of the additional concentration grant add-on funding includes the following:

- \$10M for programmatic staff supports in identified schools over five years (2022-23, 2023-24, 2024-25, 2025-26, and 2026-27), with strategic carryover of a portion of these funds each year to ensure that they remain available for the full five years
- \$2M for one-time investments in declining enrollment to level student services
- \$2M for additional Board and community suggestions

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

Oakland Unified included one-time COVID-19 federal relief funds in the 2021-2024 OUSD LCAP, adopted in June 2021; the Safe Reopening plan, "Supporting Students Together: A Roadmap to Safely Reopening," originally adopted in February 2021; and the ESSER III Expenditure Plan, adopted in October 2021. Engagement on the use of these funds was conducted as part of the Spring 2021 engagement in LCAP development and the Fall 2021 engagement on the ESSER III Expenditure Plan. Please see the 2021-2024 LCAP for a detailed description of engagement activities.

In Fall 2021, the LCAP PSAC led additional engagement around use of both ongoing LCFF funds and [one-time COVID relief funding](#) as part of their regular meeting cycle to hear updates on implementation and spending and to provide input on additional uses of these funds.

Fall 2021 LCAP Parent & Student Advisory Committee (PSAC) General Meeting Topics

GENERAL QUESTIONS

How did student enrollment and attendance shape funding for our current budget?
 What was our funding for the budget this year?
 What different streams of funding are we working with?
 What funding changes did we have to address in this year's budget?

September	October	November
<p>FOCUS: USE OF COVID RELIEF DOLLARS AND RESOURCES</p> <p>How were Covid relief dollars allocated both centrally and at school sites?</p> <p>How were centrally managed resources funded by Covid relief dollars assigned to school sites? Which schools are receiving those resources?</p> <p>To what degree have the dollars that were assigned been utilized so far? (For example: people hired; materials bought, etc.)</p> <p>Do we expect a balance of Covid relief dollars to be available for the 2022-23 budget?</p>	<p>FOCUS: SCHOOL-MANAGED POSITIONS, PROGRAMS, AND INVESTMENTS</p> <p>What is the base allocation of positions for school sites?</p> <p>What funding did schools receive to make investments beyond their base?</p> <p>What investments are schools making beyond the base assigned to them?</p>	<p>1ST WEEK: BUDGET 101</p> <p>3RD WEEK FOCUS: CENTRALLY-MANAGED POSITIONS, PROGRAMS, AND INVESTMENTS</p> <p>What departments, programs, and positions exist centrally?</p> <p>Which of them are centrally managed investments that go beyond what is considered as base?</p> <p>How are those investments funded?</p>

The District engaged principals, teachers, classified staff, and Central Office leaders in a series of feedback sessions to gather input on strategic uses of one-time COVID-relief funds and on the overall LCAP goals and investments, including a series of consultancies with school site leaders to determine how one-time COVID-relief funds could be used most effectively at schools.

- OUSD, in collaboration with various members of the Board of Directors, hosted Town Hall sessions throughout the Fall 2021 in Districts 5, 1, 6, and 3, with community members across the district attending.
- Presented our COVID-relief investments and budget plans at two public meetings with the Budget and Finance Committee of the Board of Education.
- Two public meetings before the Board of Education, including the meeting where the ESSER III plan was approved.

- Weekly meetings with Principals and Network Superintendents and Partners throughout August and September to support the COVID-relief investments at their school sites.

As part of the preparation for budget development for the 2022-23 school year, the PSAC engaged school site communities through their School Site Councils around the use of COVID relief funding through a survey and proposed agenda topics for SSC meetings.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

Oakland Unified has implemented a robust COVID safety plan to ensure the health and safety of students, educators, and other staff in order to continue services at all school sites. Upon returning to in-person instruction, OUSD successfully implemented a COVID-19 testing program and Protocol for Site Leaders and Department Heads regarding Student and Staff COVID-19 Positive Test Results, Symptoms, or Prolonged Close Contact that is based on the guidance from the Center of Disease Control (CDC), California Department of Public Health (DPH), and Alameda County Public Health Department (ACDPH). OUSD regularly updates our program(s) and protocol as the guidance from the CDC, DPH and ACPHD is updated. OUSD has quickly responded to changing circumstances, including significantly increasing our testing program due to the Omicron surge and coordinating vaccination clinics for all students as they became eligible, while continuing to align our work with the overall goals identified in the applicable plans. Additionally, OUSD has developed a contact tracing system that works to decrease exposure to students, educators, and other staff. The details of these plans as well as COVID-19 positive cases throughout the district is available to the public on our website through a new dashboard developed as part of the implementation of the applicable plans.

The majority of ESSER III investments are planned for the 2022-23 and 2023-24 school years. However, a few investments were made during the 2021-22SY in response to education partner feedback and input. These investments include:

- Additional mental health supports;
- Additional intervention, including literacy intervention;
- Additional family engagement positions;
- An expanded home visit program, including teacher training and funding visits;
- Additional investments in technology and technical support;
- A new investment in early literacy;
- Three new case managers to support foster youth;

- Two new case managers and a social worker to support unhoused students and their families;
- Anti-racist professional development for all staff;
- The creation of a Black Reparations working group; and
- Significant expansion of our COVID Health and Safety investments.

In service of our LCAP goals, OUSD adopted a budget in June 2021 that included a total of \$81.5M in COVID funds to support spending in the categories identified in the chart below.

GOAL 5 STATUS	Budgeted Expenditure	Estimated Actuals
5.1: Coordinated Districtwide Pandemic Response	\$34.8M	\$30.8M
5.2: Educational Technology & Technical Support	\$6.7M	\$1.4M
5.3: COVID-19 Health & Safety	\$9.8M	\$7.1M
TOTAL	\$51.3M	\$39.3

OUSD has struggled to fill many of the positions identified in our plans. At the start of the 2021-22 school year, we had a total of 495.9 COVID-funded Full-time Equivalent (FTE) of which 270.8 FTE or 227 positions were vacant. By January 2022, 151 positions remained vacant. We will continue to recruit qualified candidates to fill these vacant positions in order to achieve our planned LCAP goals, as appropriate. We have also made adjustments to our plans, as necessary as needs changed throughout the year. For example, some labor investments were modified to support current teachers with planning, curriculum development, additional professional development, and training opportunities.

The above spending categories include the following specific investments:

ACADEMIC SUPPORTS (Actions 5.1 and 5.2)

- Professional development for teachers and principals (Action 5.1)
- Distance learning supports (e.g., staff and technology, Action 5.2)
- Literacy improvements (e.g., reading tutors, Action 5.1)

COVID HEALTH & SAFETY (Action 5.3)

- Symptom checks, COVID testing, personal protective equipment (PPE), and air purification
- Additional custodial supports
- Safety Leads at schools

ENGAGEMENT & MENTAL HEALTH (Action 5.1)

- Community positions at school sites
- Translation services

MAINTAINING STAFF/OPERATIONS (Action 5.1)

- Restoration of potential staff reductions
- Compensation increases for increased responsibilities
- Support to continue existing and modified operations

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA's 2021–22 LCAP and Annual Update.

Oakland Unified uses its adopted plans, including the 2021-2024 LCAP, the ESSER III Expenditure Plan, and the Safe Return to In-Person Instruction and Continuity of Services Plan, to guide spending decisions throughout the year. Where spending departs from the adopted plan, this is typically because a new, acute need arises that is consistent with the plan goals. For instance, OUSD significantly expanded its COVID-19 testing program in Winter 2021/22 due the surge of the Omicron variant. This additional investment was not anticipated when the LCAP and ESSER III spending plans were adopted in the summer and fall of 2021, but is consistent with the adopted plan goals, and will be reflected in the Goal Analysis and Annual Update Table in the 2022-23 LCAP. Like many California districts, OUSD has also struggled to fill vacancies in the 2021-22 school year, so expects actual spending in some areas to be below planned spending due to late hires or year-long vacancies. In Fall 2021, the District created a new, discrete resource to hold LCFF Supplemental & Concentration carryover to ensure that both staff and community members could clearly see and budget for carryover dollars each year. One-time COVID-19 federal relief funds are multi-year grants, so any unspent dollars will be reallocated for needed supports in the 2022-23 school year. The process for reallocation relief funds for school sites began in January 2022 and will continue through the spring as more is known about current year spending and school site needs.

LCFF Budget Overview for Parents

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Oakland Unified School District

CDS Code: 01 61259 0000000

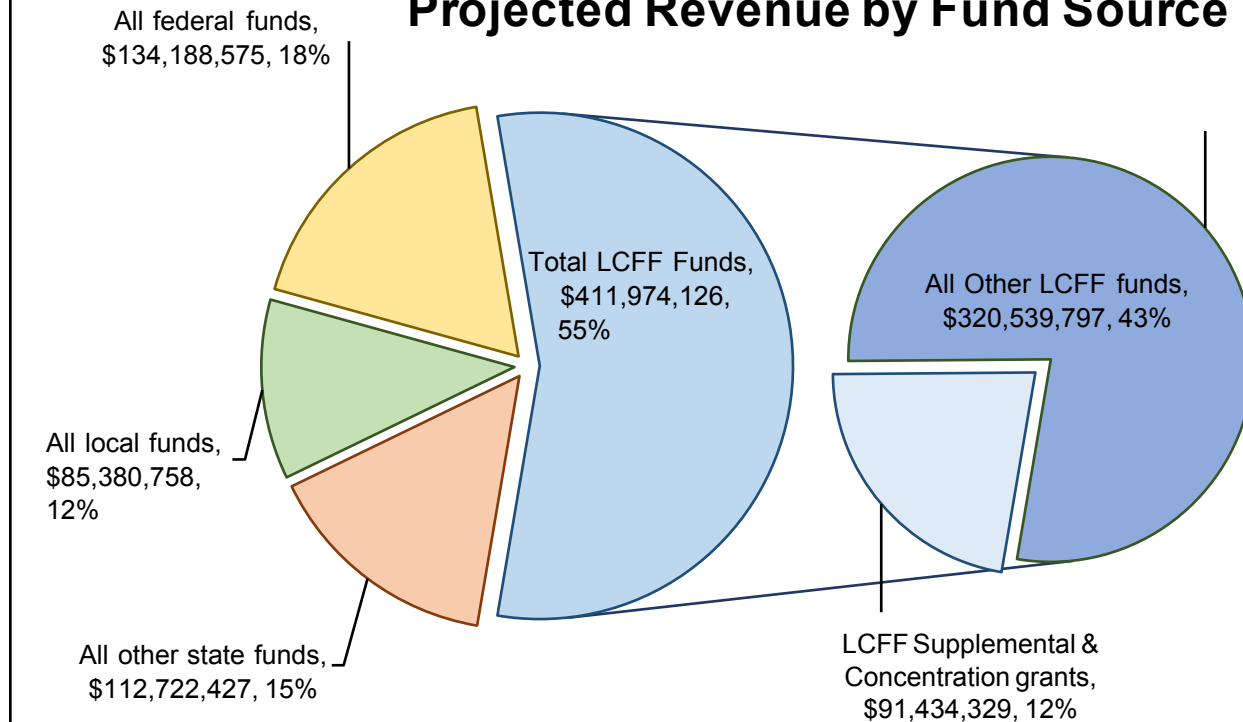
School Year: 2021 – 22

LEA contact information: Sondra Aguilera, 510-879-4289, sondra.aguilera@ousd.org

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2021 – 22 School Year

Projected Revenue by Fund Source

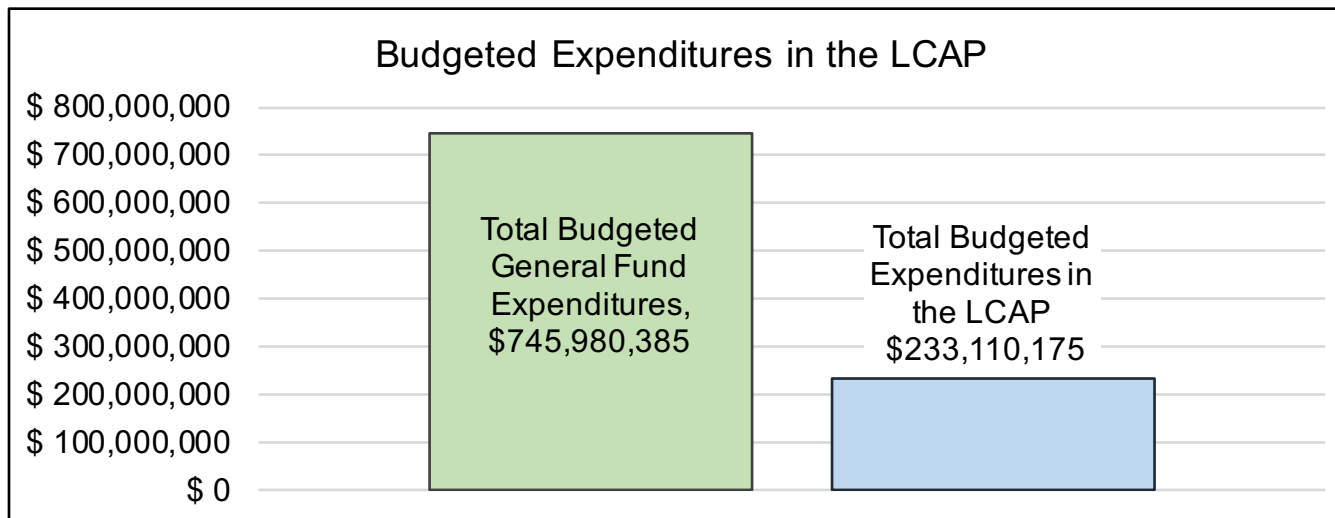


This chart shows the total general purpose revenue Oakland Unified School District expects to receive in the coming year from all sources.

LCFF Budget Overview for Parents

The total revenue projected for Oakland Unified School District is \$744,265,886.00, of which \$411,974,126.00 is Local Control Funding Formula (LCFF), \$112,722,427.00 is other state funds, \$85,380,758.00 is local funds, and \$134,188,575.00 is federal funds. Of the \$411,974,126.00 in LCFF Funds, \$91,434,329.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Oakland Unified School District plans to spend for 2021 – 22. It shows how much of the total is tied to planned actions and services in the LCAP.

LCFF Budget Overview for Parents

Oakland Unified School District plans to spend \$745,980,385.00 for the 2021 – 22 school year. Of that amount, \$233,110,175.00 is tied to actions/services in the LCAP and \$512,870,210.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

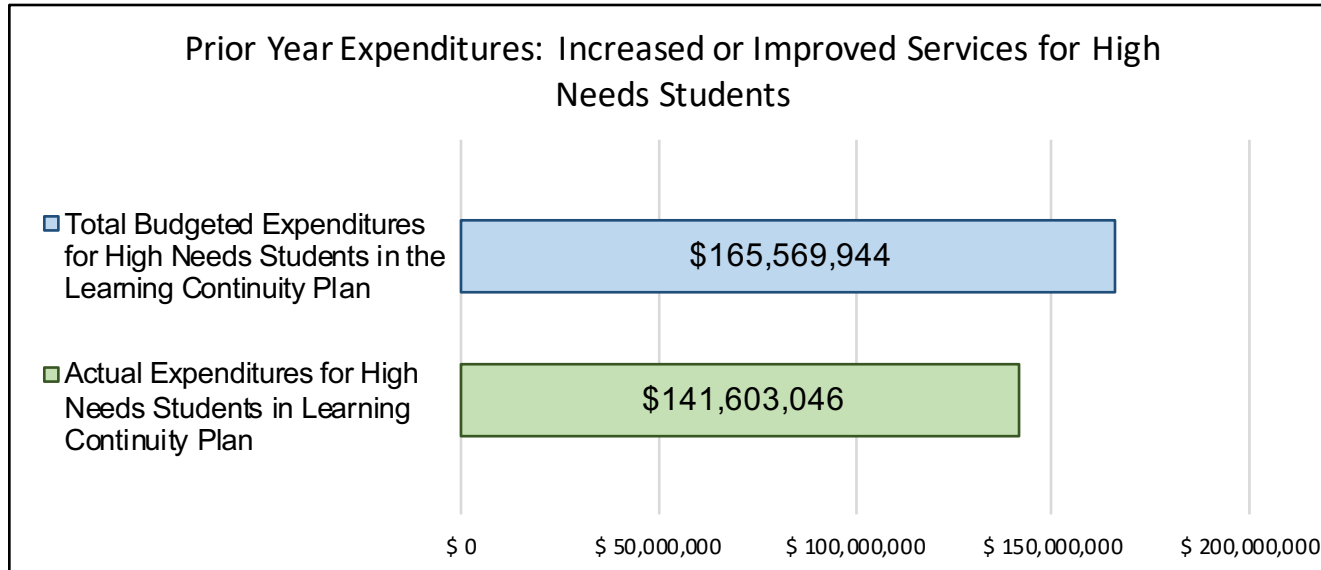
The General Fund budget expenditures not included in the LCAP include district-wide expenses to support the following: general education teaching and clerical support staff for school sites, central support staff, general supplies, utilities, facilities, grounds, maintenance, repairs, and other basic operational functions. In addition, investments funded by 2020-21 LCFF Supplemental & Concentration carryover and the increased 2021-22 LCFF Concentration grant were not included in the LCAP at adoption, but will be detailed in the Annual Update in June 2022.

Increased or Improved Services for High Needs Students in the LCAP for the 2021-22 School Year

In 2021 – 22, Oakland Unified School District is projecting it will receive \$91,434,329.00 based on the enrollment of foster youth, English learner, and low-income students. Oakland Unified School District must describe how it intends to increase or improve services for high needs students in the LCAP. Oakland Unified School District plans to spend \$173,608,772.00 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2020 – 21



This chart compares what Oakland Unified School District budgeted last year in the Learning Continuity Plan for actions and services that contribute to increasing or improving services for high needs students with what Oakland Unified School District estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

LCFF Budget Overview for Parents

In 2020 – 21, Oakland Unified School District's Learning Continuity Plan budgeted \$165,569,944.00 for planned actions to increase or improve services for high needs students. Oakland Unified School District actually spent \$141,603,046.00 for actions to increase or improve services for high needs students in 2020 – 21. The difference between the budgeted and actual expenditures of \$23,966,898.00 had the following impact on Oakland Unified School District's ability to increase or improve services for high needs students:

The Learning Continuity Plan (LCP) included a two-year budget for state and federal one-time COVID relief resources, so a portion of the expenditures were always planned to be 2021-22 investments. They are therefore not reflected in the actual 2020-21 spending. In the new 2021-2024 LCAP, only one-time investments projected for the 2021-22 school year are included in the totals for clarity.

Projected expenditures for 2021-22 exceed projected revenue for a related reason: a significant portion of one-time COVID-19 relief funding was recognized as revenue in the 2020-21 school year but will not be spent until the 2021-22, 2022-23, or 2023-24 school year, depending on the grant plan.