



**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

2016-17 BUDGET DEVELOPMENT Board Study Session



Presented to the Board of Education

May 11, 2016

Our Mission

Oakland Unified School District (OUSD) will build a Full Service Community District focused on high academic achievement while serving the whole child, eliminating inequity, and providing each child with excellent teachers, every day.

Our Vision

OUSD students will find joy in their academic experience while graduating with the skills to ensure they are caring, competent, fully-informed, critical thinkers who are prepared for college, career, and community success.

I Am Oakland Unified

Our belief is that significant improvement in student outcomes is driven at the school level. Our every action centrally is in the service of one purpose: building quality community schools that prepare students for college, career, and community success.






Goals

To gain a better understanding of the Oakland Unified School District (OUSD) budget and alignment to priorities.

To provide a transparent explanation of how the OUSD 2016-17 budget is developed.

To answer any questions about elements of the budget and the budget development process.

2016-17 Budget Development Calendar

-  Completed
-  Board Progress Reports
-  Measure N

	Board Item	Activity Type	Date
1	LCAP Parent & Student Advisory Committee (PSAC) "Retreat"	Engagement	August 29, 2015
2	Approve Board Priorities for 2016-17 Budget	Discussion	September 9, 2015
3	Review Calendar for 2016-17 LCAP and Budget Engagement	Discussion	September 24, 2015
4	LCAP PSAC Elections	Engagement	October 14, 2015
5	LCAP PSAC General Meeting	Engagement	October 21, 2015
6	Executive Cabinet Prioritization Process	Staff Work	November 2015
7	Progress report on 2016-17 LCAP and Budget Development	Staff Report	December 2, 2015
8	LCAP PSAC General Meeting	Engagement	December 16, 2015
9	Budget Guidelines and "One-Pagers" provided to Schools	Schools	January 14, 2016
10	Budget Tool available to Schools & Central Offices	Schools	Late January 2016
11	Review Governor's Proposed 2016-17 State Budget	Staff Report	January 27, 2016
12	Call-in for Principals on Budget	Supt & Staff	Week of January 25
13	Superintendent submits potential 2016-17 Employee Additions, Reductions, Eliminations, or Reclassifications	Action	January 27, 2016
14	Progress Report on 2016-17 LCAP & Budget Development	Staff Report	January 27, 2016
15	Initial Measure N Plans and Budgets due to Linked Learning Office	High Schools	January 29, 2016
16	School Site Councils Review Site Budgets	Engagement	January & February 2016
17	LCAP PSAC General Meeting	Engagement	February 17, 2016
18	Progress report on 2016-17 LCAP & Budget Development	Staff Report	March 9, 2016
19	LCAP PSAC General Meeting	Engagement	April 20, 2016
20	LCAP Orientation for Staff & Labor	Engagement	April 21, 2016
21	Schools and Central Offices Complete Budget Development for 2016-17	Schools	End of April 2016
22	2016-17 LCAP and Budget Study Session	Staff Report	May 11, 2016
23	Staff recommendation to Measure N Commission for School Plan and Budget Approvals	Staff Report	May 17, 2016
24	Review Governor's 2016-17 Revised State Budget	Staff Report	May 25, 2016
25	Measure N Commission recommendations for Plan and Budget Approvals to BOE	Discussion	June 8, 2016
26	1st Reading of 2016-17 LCAP and Budget	Discussion	June 8, 2016
27	LCAP PSAC General Meeting	Engagement	June 15, 2016
28	Approve OUSD 2015-16 LCAP and Budget	Action	June 22, 2016



Agenda

Executive Summary

District At A Glance

Local Control Accountability Plan (LCAP)

- Historical Context

Year over year

2015-16 Current Budget (2nd Interim)

2016-17 Budget

Total Budget

Total General Fund

Unrestricted General Fund

Restricted General Fund

School Site Budgets

Next Steps

Appendix

EXECUTIVE SUMMARY

Executive Summary

Investments made in 2015-16 will continue into 2016-17, including **additional compensation for the District's employees.**

Realignment continues with cuts to central offices to allow more funds directly at school sites.

Schools will see additional resources, with over **\$12.8 million** additional funds allocated directly to school sites.

This is one of several steps in the budget development process; **the numbers will change.** These estimates are based on the Governor's 2016-17 Proposed Budget in January and will be adjusted after the May Revise is announced.

Executive Summary

What's New and/or Different in 2016-17

TOTAL ESTIMATED ADDITIONAL UNRESTRICTED RESOURCES:

\$18 million in new on-going unrestricted funds from the Local Control Funding Formula (LCFF).

\$7.6 million in one-time unrestricted funds, based on the Governor's 2016-17 Proposed Budget in January. This is \$11.1 million less than the \$18.7 million provided in 2015-16.

TOTAL ADDITIONAL INVESTMENTS:

65% of the above additional funds will go towards employee compensation

\$11.7 million in on-going spending

\$4.9 million in one-time

Additional resources provided directly to school sites include:

\$3.5 million for the Call for Quality Schools process – targeted to specific schools for innovation and change.

\$3.2 million in additional discretionary funds allocated to schools based on the School Performance Framework (SPF) designations.

\$2.1 million for educator effectiveness programs based on SPF designations.

\$1.7 million for library services based on SPF designations.

\$1.3 million (additional teachers) to support newcomer students

\$1.0 million (additional teachers) to pilot Special Education inclusion programs at 10 schools

DISTRICT AT A GLANCE

District At A Glance

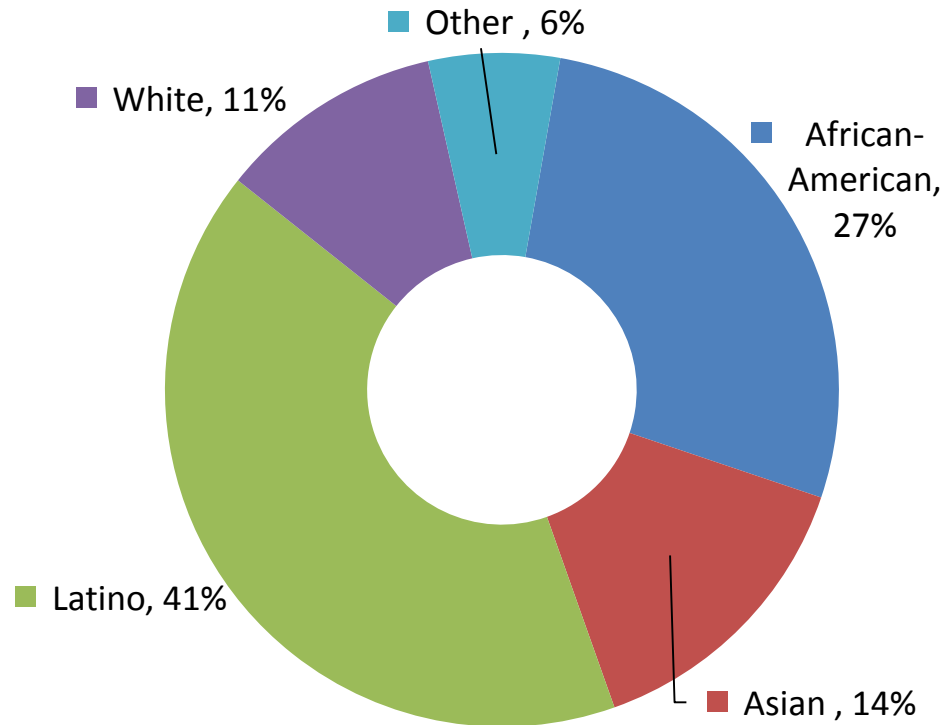
2015-16 Number of Schools and Students

School Type (Fast Facts 2015-16)	# of Schools (Fast Facts 2015-16)	# of Students (Fast Facts 2015-16)
Elementary (TK-5 & K-8):	54	20,532
Middle (6-8):	14	7,140
High (9-12, including Alternative & Continuation):	18	9,403
Total OUSD K-12:	86	37,075
Charters:	37	11,977
Total Oakland:	123	49,052
Early Childhood Centers:	29	1,320

Source: OUSD Fast Facts 2015-16

District At A Glance

2015-16 OUSD Student Demographics



Other Characteristics:	
English Learners	30%
Free/Reduced Price Lunch	72%
Foster Students	1%
Unduplicated LCFF Count	78%
Special Education Students	11%

Source: OUSD Fast Facts 2015-16

LOCAL CONTRAL ACCOUNTABILITY PLAN (LCAP)

LCAP

What Drives our District Budgeting?

**Our Budgeting
Decisions are
Based on Two
Core Documents
Developed with
Community Input**

Vision: Pathway To Excellence

Plan: LCAP

District
Budget

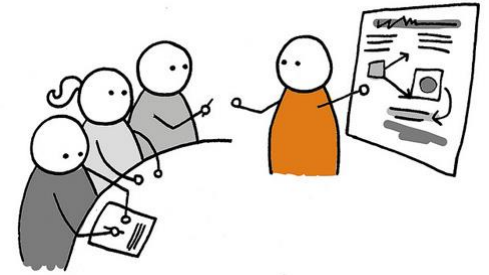
LCAP Overview

The State of California funds school districts using the **LCFF**, a school funding system that promotes equity and transparency to improve achievement. Under LCFF, all school districts are required to develop a LCAP.

The **LCAP** is a rolling, 3-year accountability plan that aligns our budget with our District goals and with the eight State priority areas. The plan requires input from stakeholders to ensure it meets the needs of our state and local target student groups, and the needs of all students.

The LCAP is a **LIVING** document that is reviewed and updated annually to align with district and state priorities.

LCAP Engagement



- The Parent Student Advisory Council (PSAC) was elected in October 2015 and has been meeting regularly as a whole and in sub-groups to review the various actions and programs that are highlighted in the LCAP.
- Several recommendations from the Foster Youth Focus Group and the English Learner's Subcommittee were approved by the PSAC on April 20, 2016 (LCAP Goal 4).
- Additional recommendations for Goals 5 & 6 and the LCAP process will come from PSAC meetings in May 2016.
- In addition to the PSAC, the District has also engaged with staff and employee representatives. Labor partners are in the process of defining what active engagement means to them.

LCAP

Annual Update for 2015-16



- The District's LCAP Manager has met with staff from all Central Departments to ask whether the action items in the 2015-16 LCAP have been implemented, and if not, why not.
- School sites have been asked to confirm whether they implemented the LCAP actions they had described in their 2015-16 Single Plan for Student Achievement (SPSAs).
- The results, along with expenditure information and measurable outcome data will be incorporated into the Annual Update.

LCAP

3 Year Plan (2016-17, 2017-18, 2018-19)

- All Central sites have been asked to complete an LCAP worksheet, linking their budget to LCAP action areas. Due in early May.
- Each school site's SPSA includes LCAP goals and use of LCFF supplemental & Concentration funds. Due in early May.

HISTORICAL CONTEXT

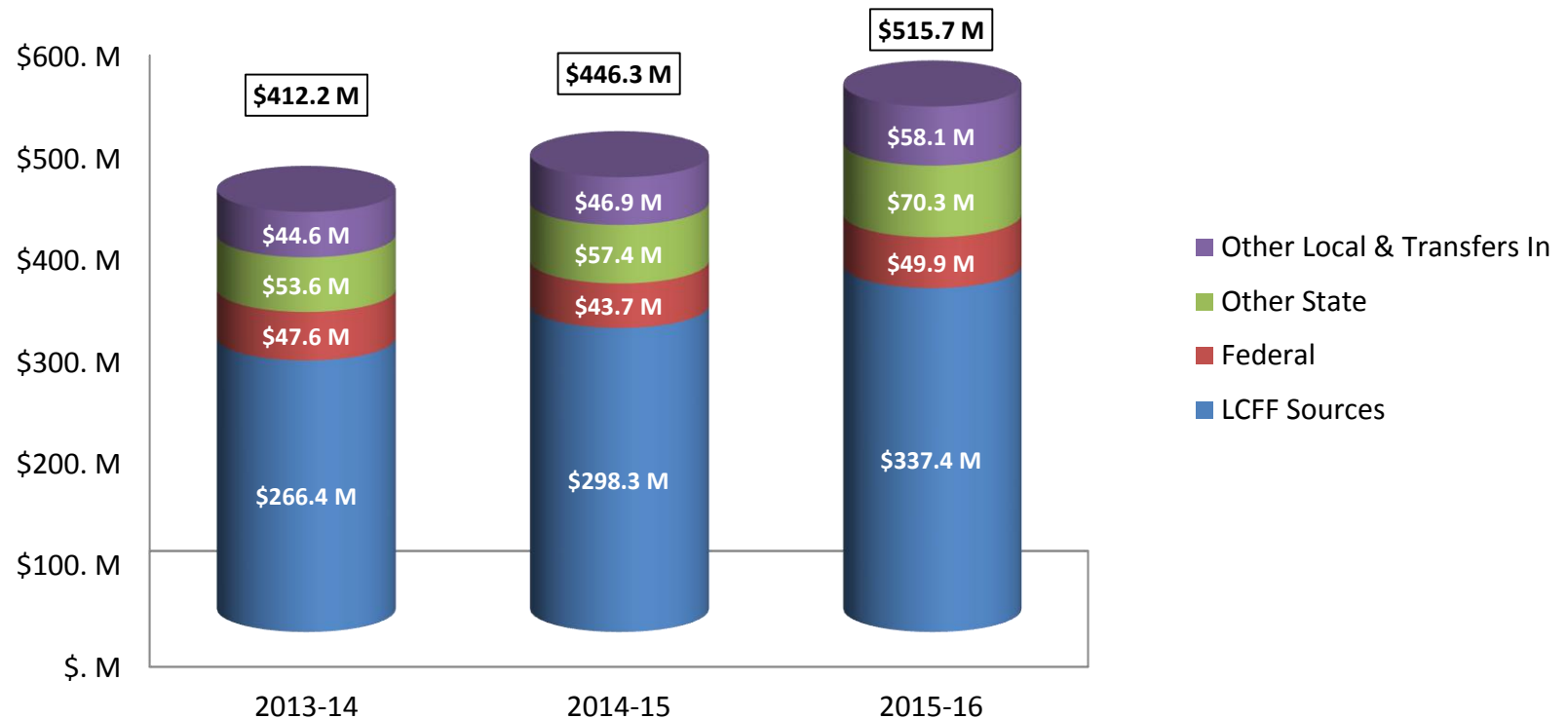
Historical Context

Revenues and Expenses have been increasing year over year.

The starting point for Budget Development is the current year.

Historical Context

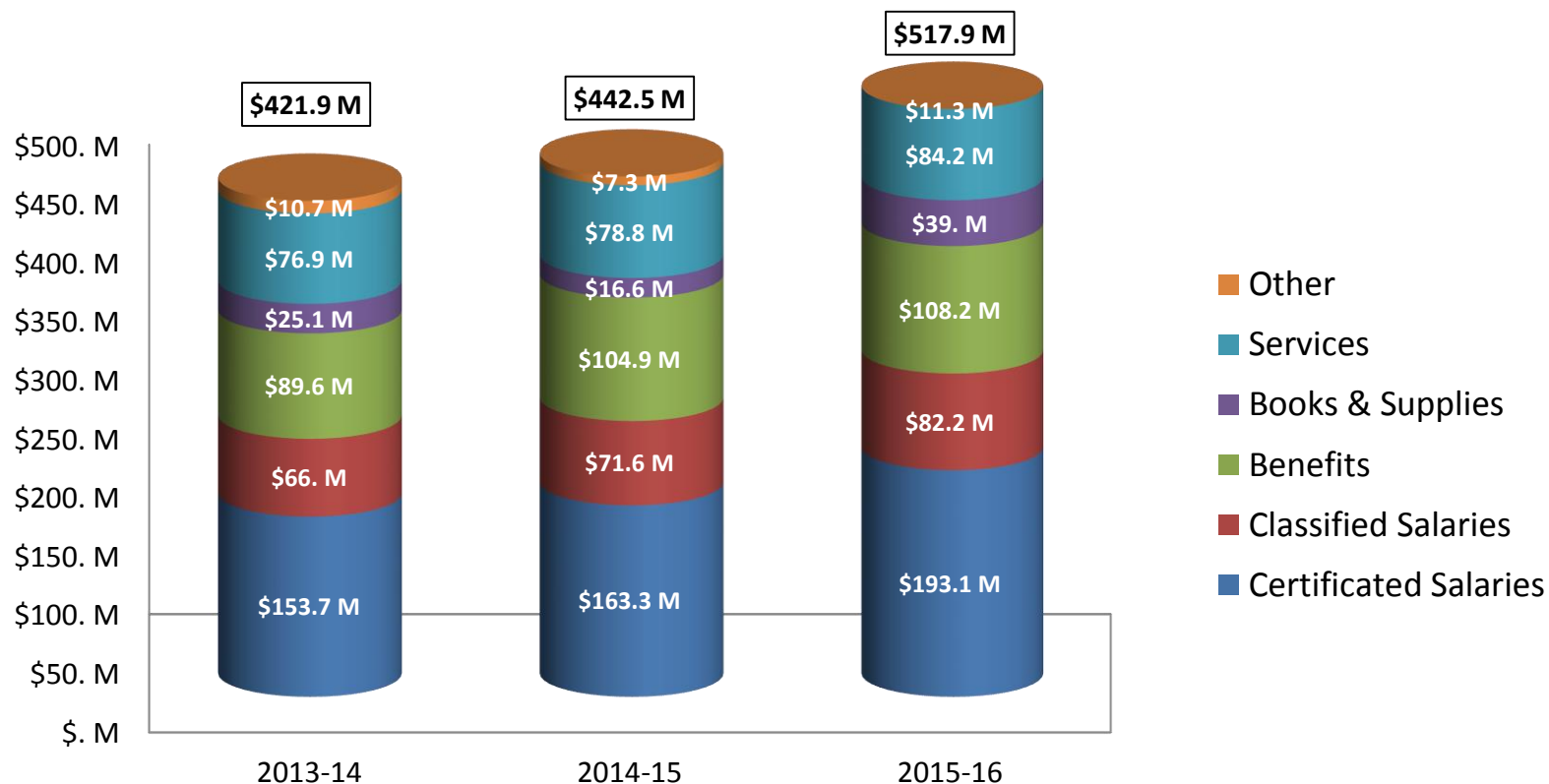
Total General Fund Revenues Have Increased over Past 3 Years



Sources: 2013-14 Audit; 2014-15 Unaudited Actuals; 2015-16 Second Interim

Historical Context

Total General Fund Expenditures Have Also Increased In Line with Revenues Over Past 3 Years



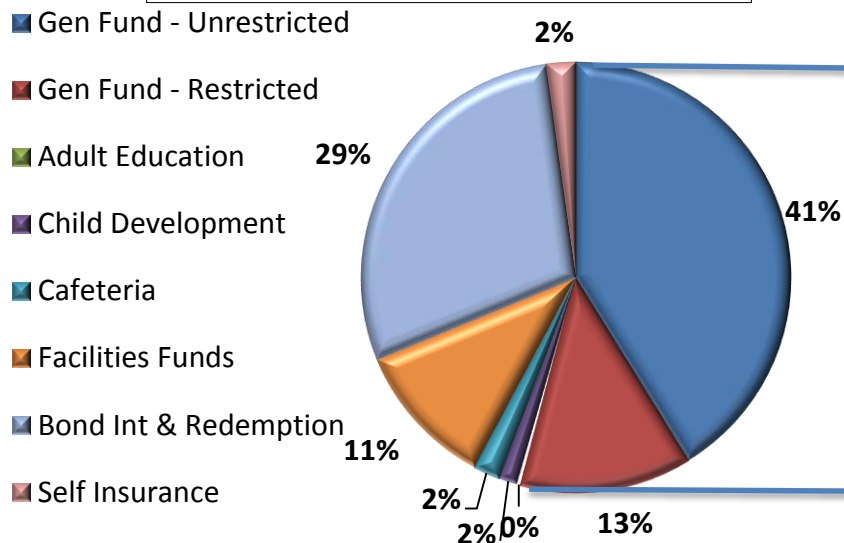
Sources: 2013-14 Audit; 2014-15 Unaudited Actuals; 2015-16 Second Interim

Historical Context

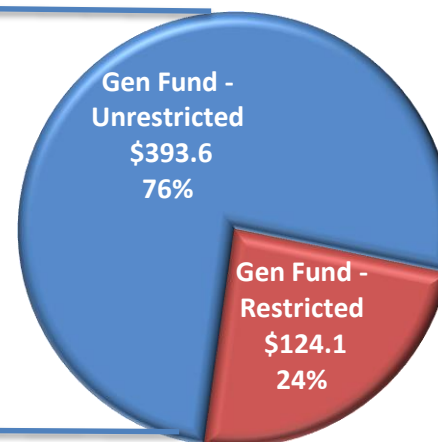
2015-16 Total Budget (as of 2nd Interim)

Total District Expenditures – All Funds: \$957 Million
Total General Fund Expenditures: \$518 Million

2015-16 Budget – All Funds
(2nd Interim)



2015-16 Budget - 2nd Interim
General Fund (\$ in Millions)

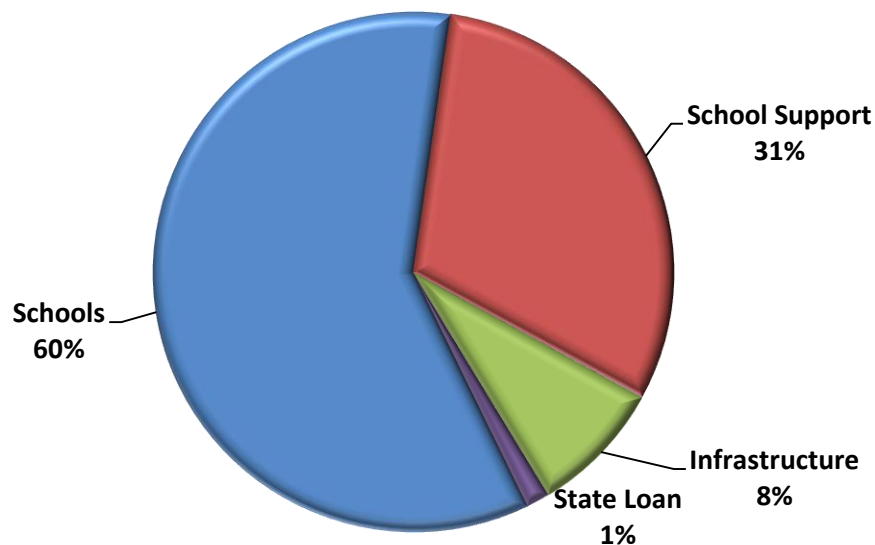


Historical Context

2015-16 Unrestricted General Fund Budget (as of 2nd Interim)

90% of Unrestricted Budget is spent at schools or on school support

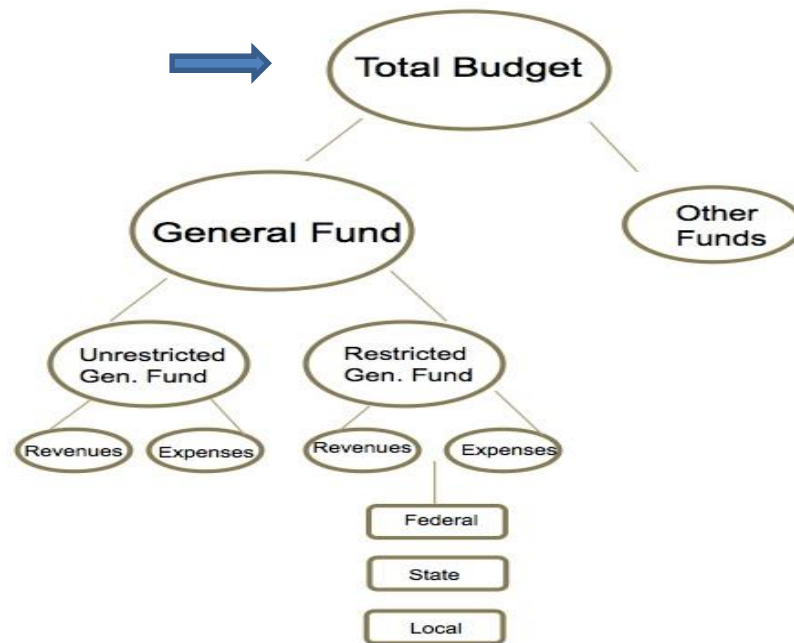
**2015-16 Budget - 2nd Interim
Unrestricted General Fund Expenditures**

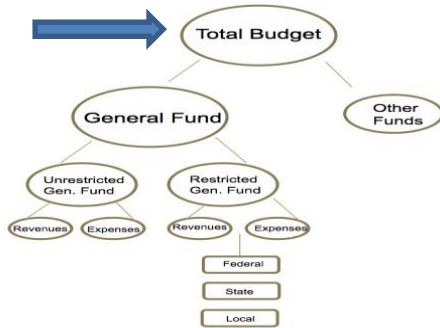


2016-17 BUDGET

2016-17 BUDGET

TOTAL BUDGET



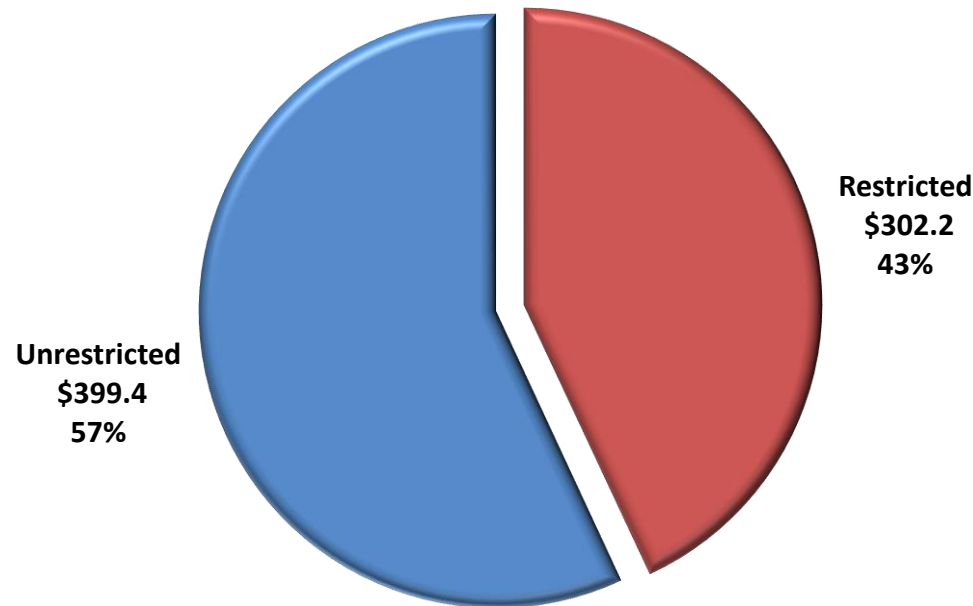


2016-17 Budget

Total Budget

Revenue By Type: \$701.6 M

All Fund Revenues
(\$ in millions)

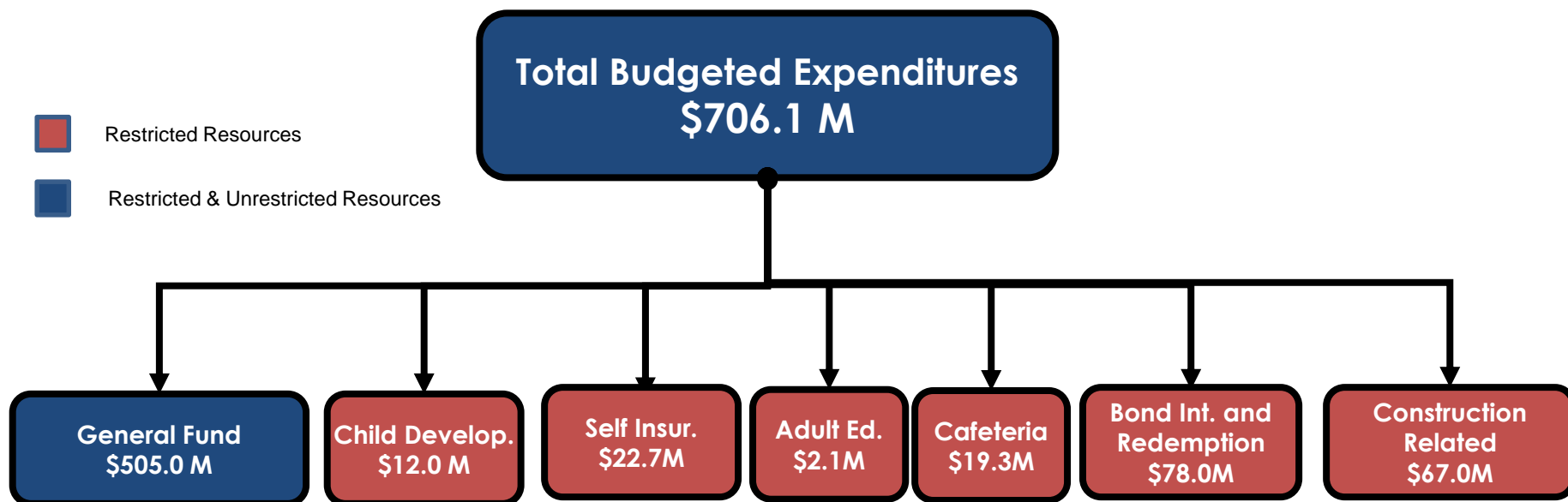


Change from 2015-16 Budget (2nd Interim): -\$339.1M
 Restricted -\$344.9 M Unrestricted +\$5.8 M

2016-17 Budget

Total Budget

Total Budget Expenditures By Fund: \$706.1M (\$ in Millions)

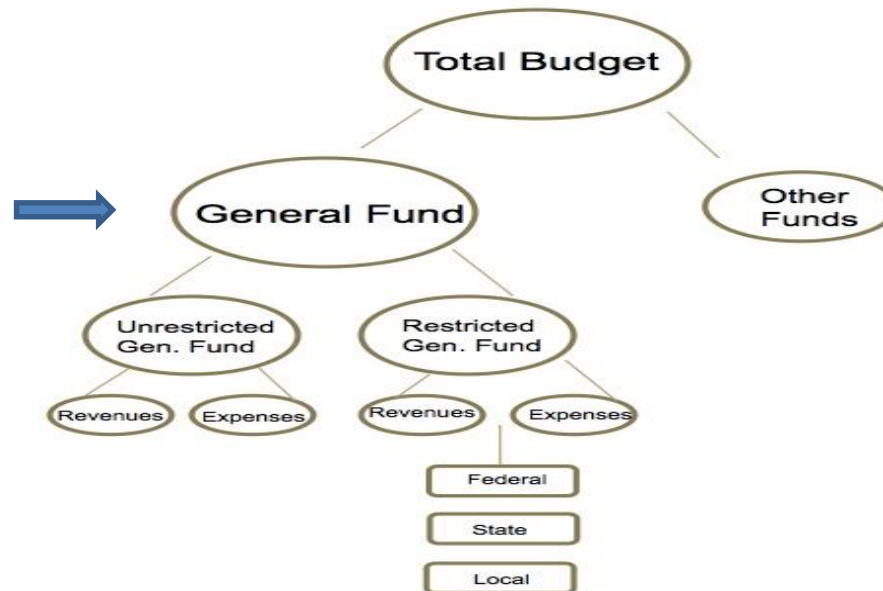


California Districts use the funds listed above to account for activities to be managed and accounted for separately. All of the activity in these Funds is restricted, with the exception of the General Fund. The General Fund has both unrestricted and restricted resources and activities that need to be managed.

Change from 2015-16 Budget (2nd Interim): -\$250.4M
 General Fund -\$13 M Other Funds -\$237.4 M

2016-17 BUDGET

TOTAL GENERAL FUND



2016-17 Budget

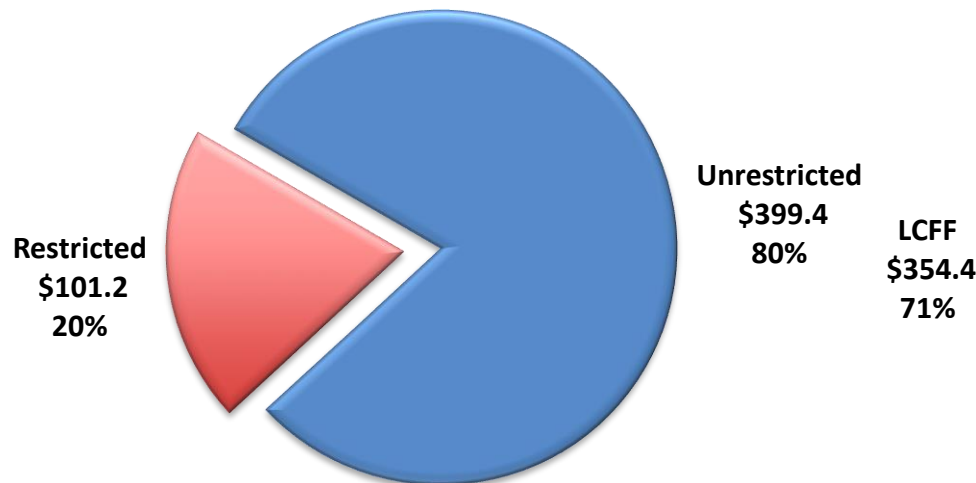
Total General Fund

Revenues

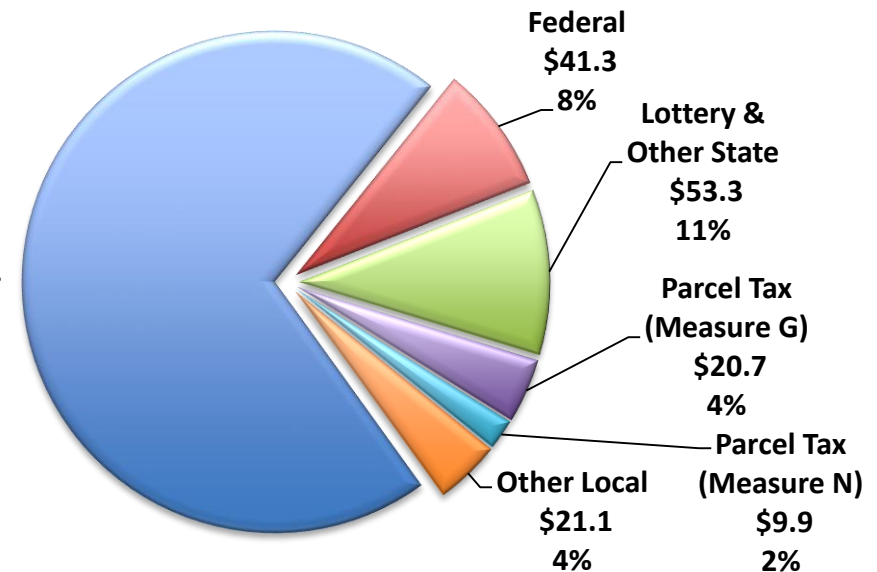
(\$ in millions)

Total: \$500.6 M

Restricted/Unrestricted



By Source



Change from 2015-16 (2nd Interim): -\$15.1 M

Restricted -\$20.9 M Unrestricted +\$5.8 M*

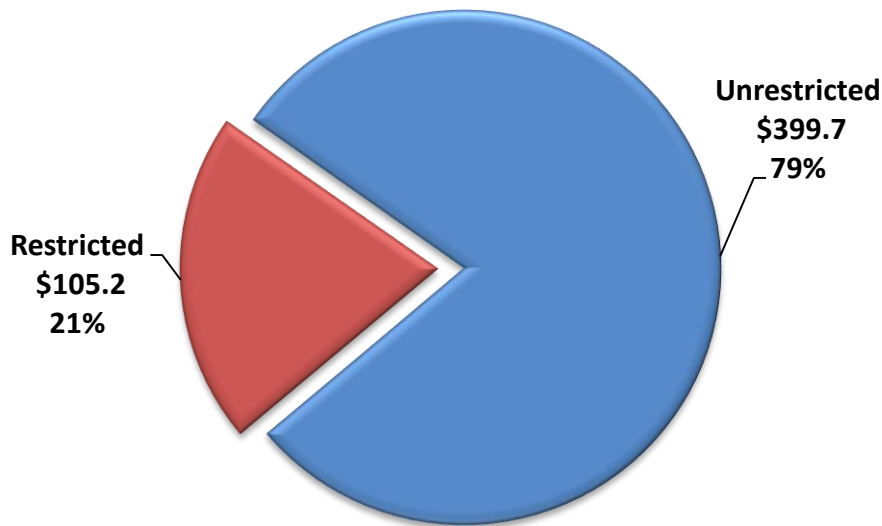
*Net of more in LCFF funds, but less in one-time funds.

2016-17 Budget Total General Fund

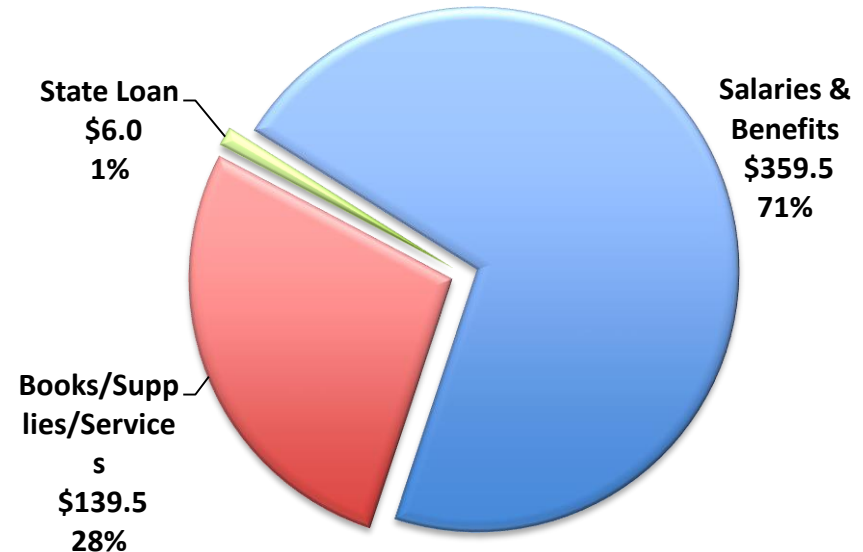
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(in millions)

Restricted/ Unrestricted



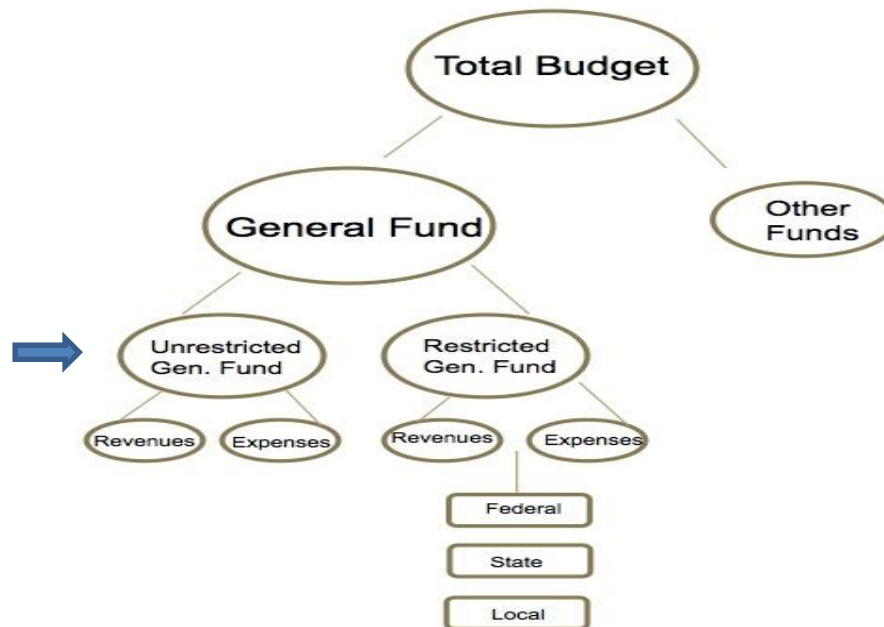
By Use

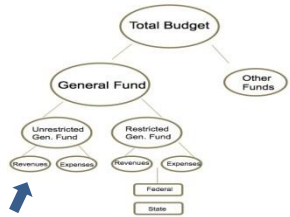


Change from 2015-16 (2nd Interim): -\$13.0M
 Restricted -\$81.1 M Unrestricted +\$68.1 M

2016-17 BUDGET

UNRESTRICTED GENERAL FUND



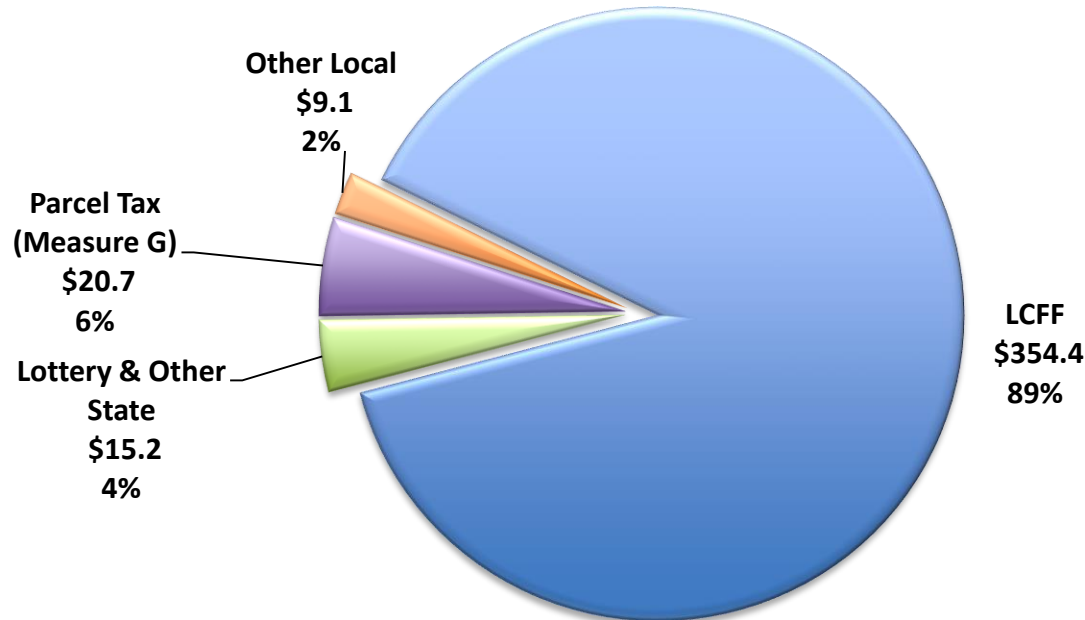


2016-17 Budget

Unrestricted General Fund

revenues
(\$ in millions)

Total: \$399.4 M



Change from 2015-16 Budget (2nd Interim): +\$5.8M

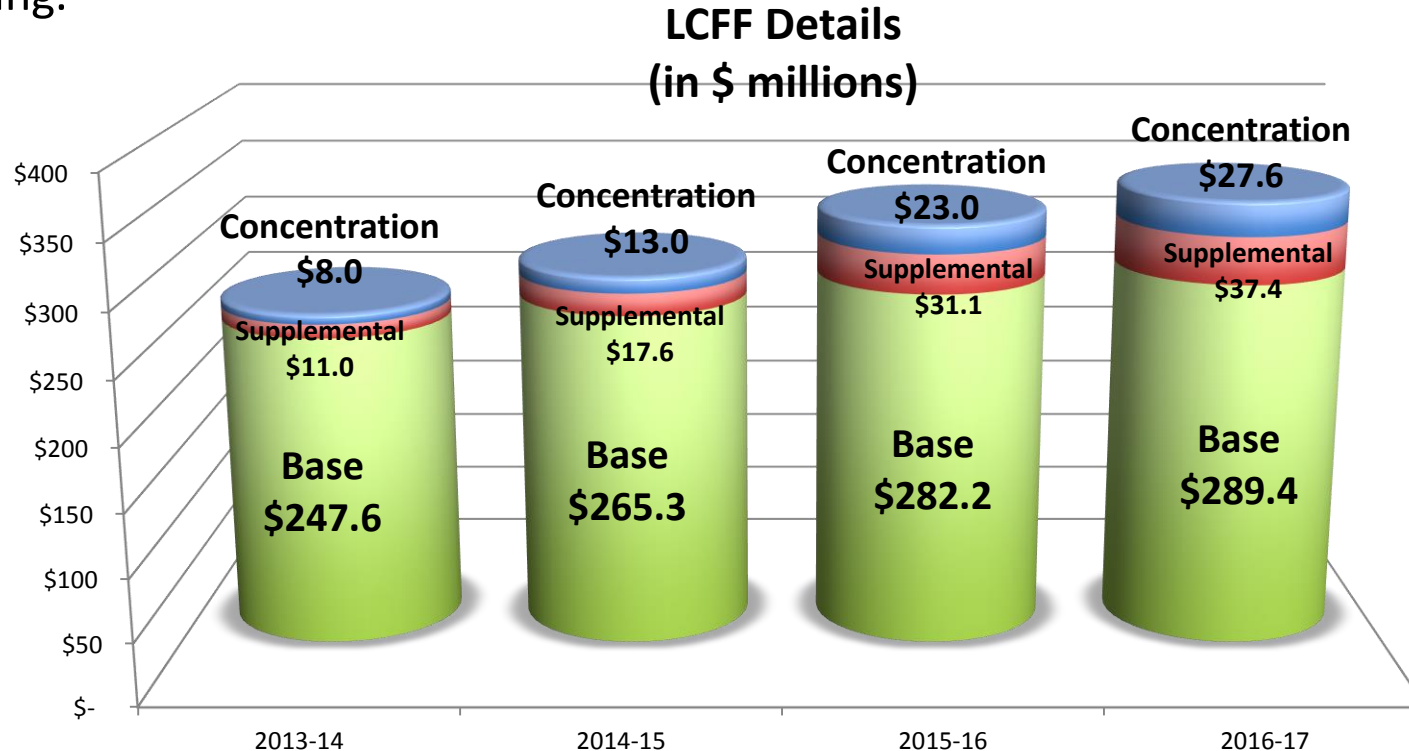


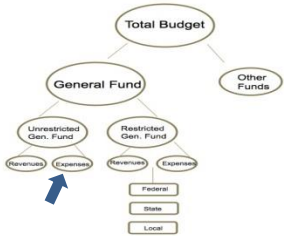
2016-17 Budget

Unrestricted General Fund

LCFF Revenues

LCFF Revenues are expected to increase by **\$18** million from 2015-16 LCFF Revenues (2nd Interim), of which **\$10.9** million is additional supplemental and concentration funding.





2016-17 Budget

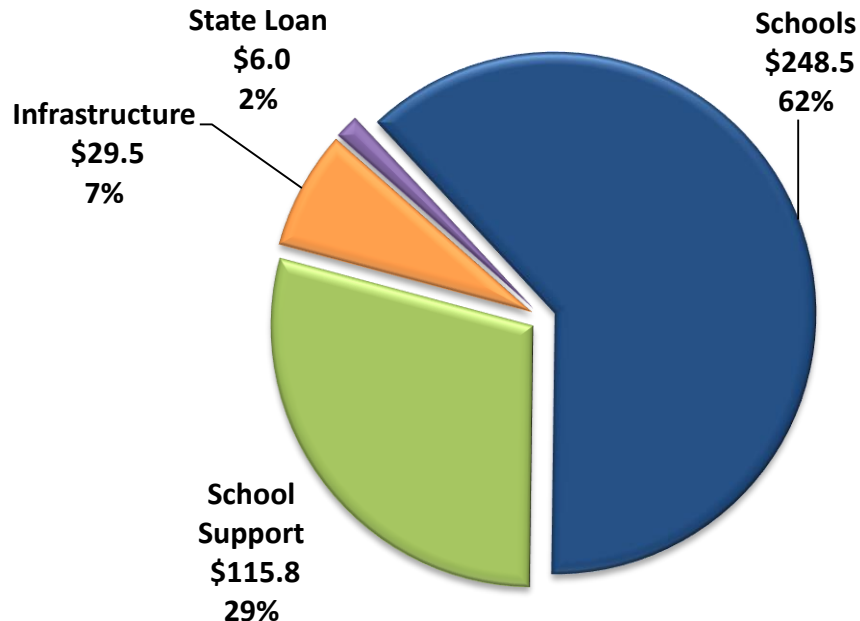
Unrestricted General Fund

Expenses

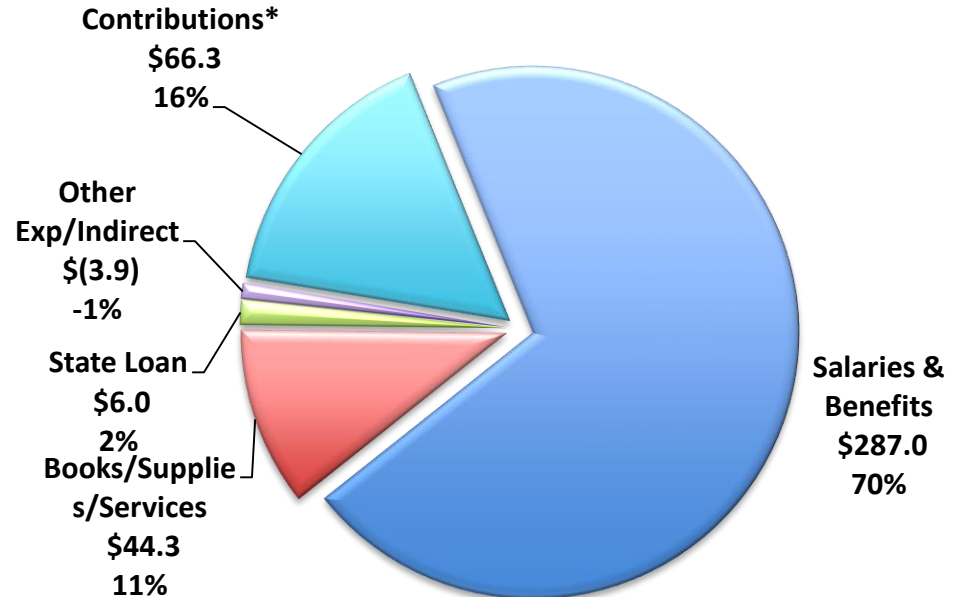
(\$ in millions)

Total: \$399.7M

By Type



By Object

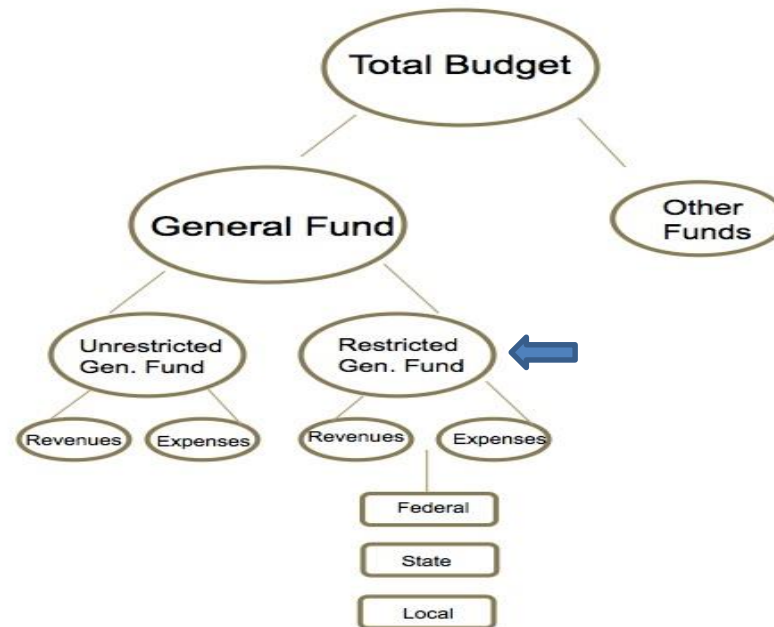


**Contributions of unrestricted funds to restricted programs - Programs for Exceptional Children (PEC) and Routine Restricted Maintenance Account (RRMA)

Change from 2015-16 Budget (2nd Interim): +\$68.1M

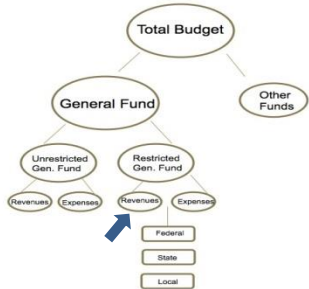
2016-17 BUDGET

RESTRICTED GENERAL FUND



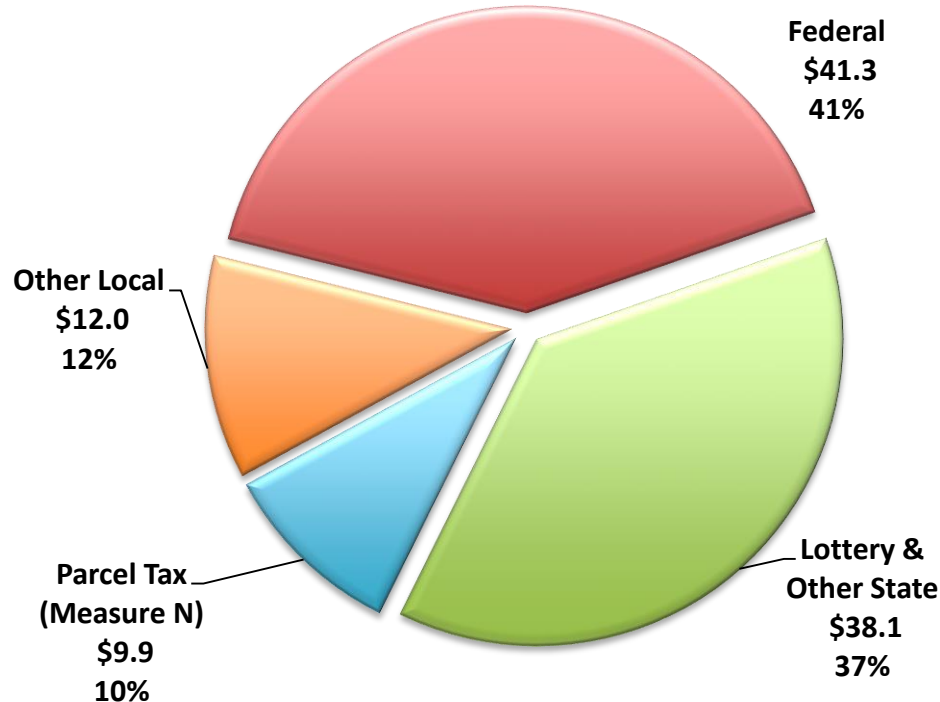
2016-17 Budget

Restricted General Fund



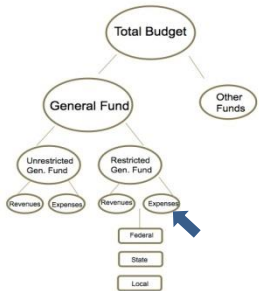
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Total: \$101.2 M



Change from 2015-16 (2nd Interim): -\$20.9 M

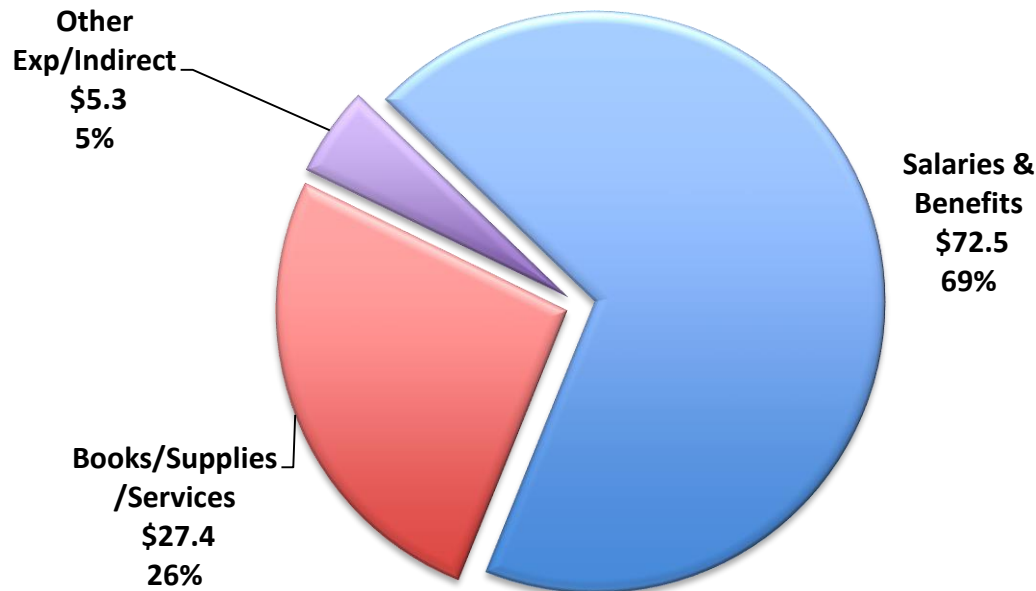
2016-17 Budget Restricted General Fund



nses

(\$ in millions)

Total: \$105.2 M

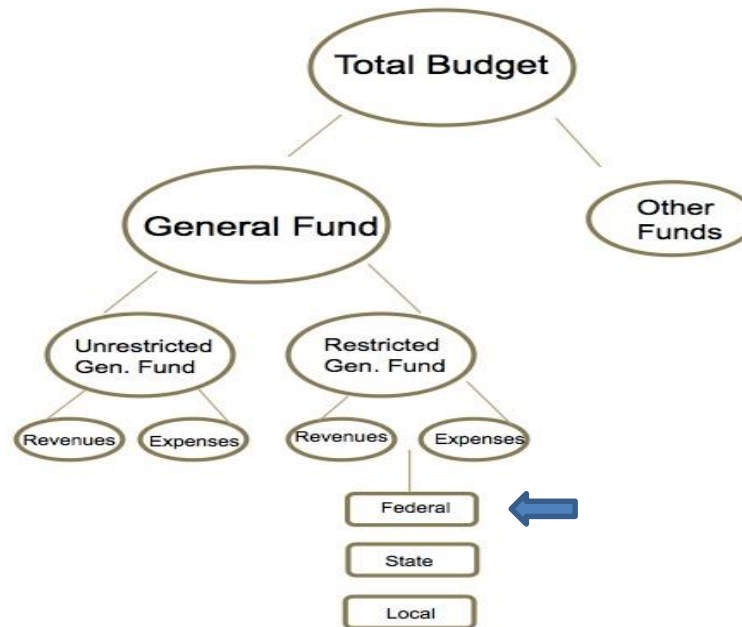


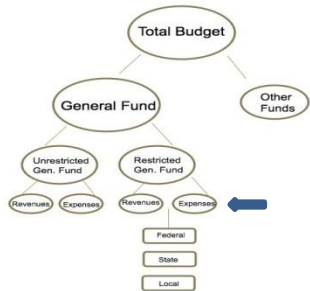
Change from 2015-16 Budget (2nd Interim): -\$81.1M

2016-17 BUDGET

RESTRICTED GENERAL FUND

FEDERAL RESOURCES



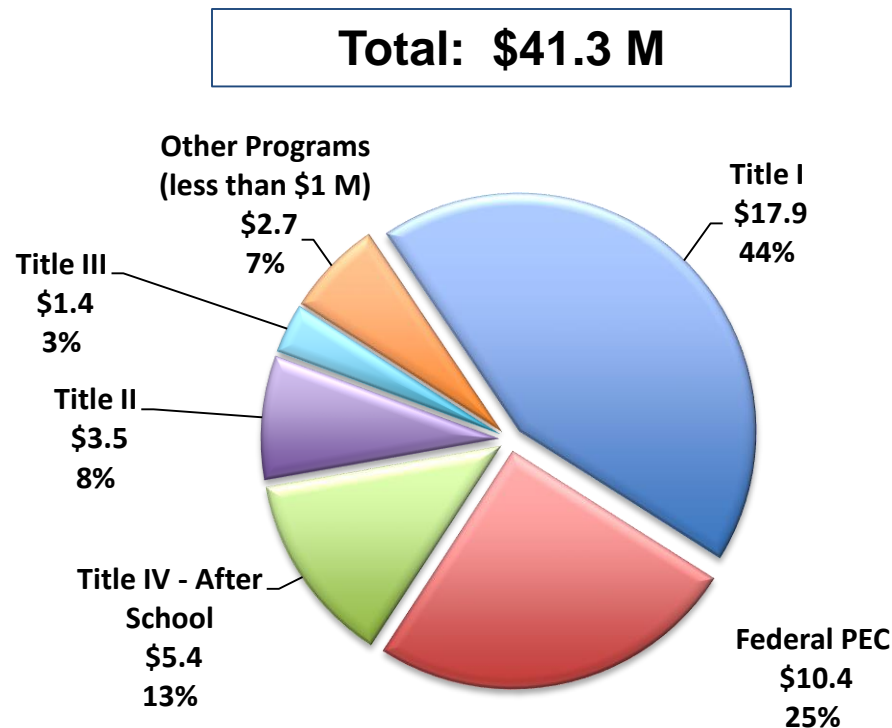


(\$ in millions)

2016-17 Budget

Restricted General Fund

Resources



Change from 2015-16 (2nd Interim): -\$8.6M



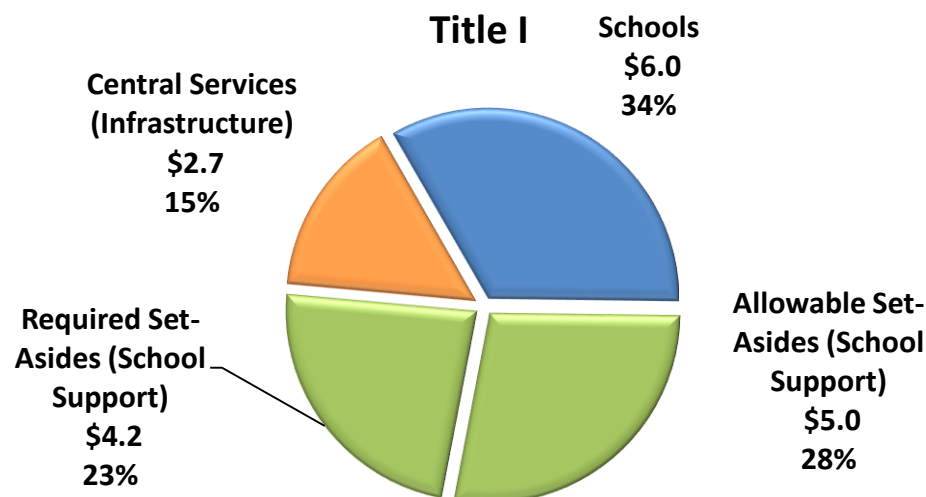
Restricted – Federal Title I

Purpose: To meet the educational needs of low-achieving students in high poverty schools. Funds are used to support effective, research-based educational strategies that close the achievement gap between high and low performing students and enable the students to meet the state’s challenging academic standards.

2016-17 Budget Restricted General Fund

Federal Resources by Use

Title 1 Total: \$17.9M



Required Set-Asides	\$ in Millions
CORE Waiver	\$ 3.6
Homeless, Neglected, Dilinquent	\$ 0.4
Parent Engagement	\$ 0.2
Required Set-Asides	\$ 4.2

Allowable Set-Asides	\$ in Millions
Early Childhood Education	\$ 2.0
Literacy	\$ 0.8
Professional Development	\$ 0.7
Summer School	\$ 0.4
School Systems Partners	\$ 0.4
Other Instructional Programs	\$ 0.7
Allowable Set-Asides	\$ 5.0

2016-17 Budget

Restricted General Fund

Federal Resources by Use



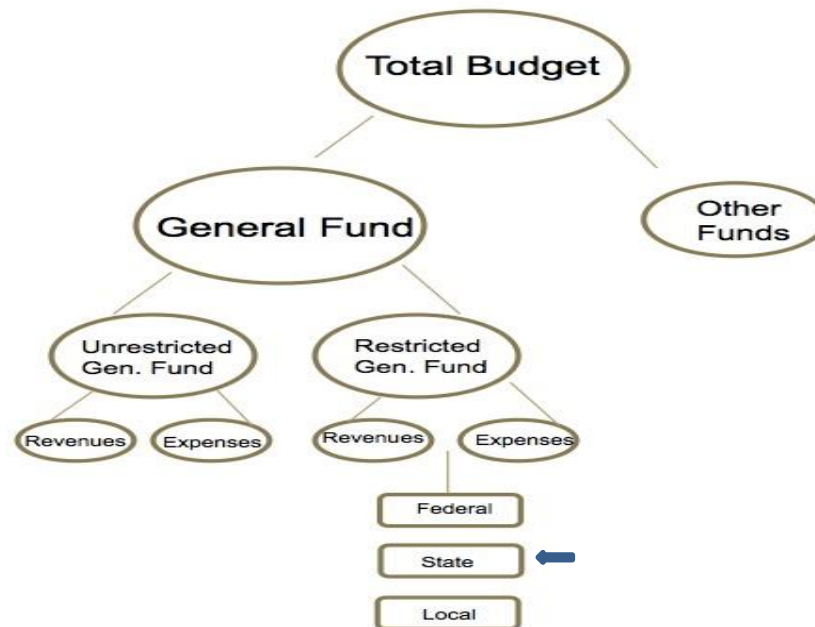
Restricted - Federal PEC Funding

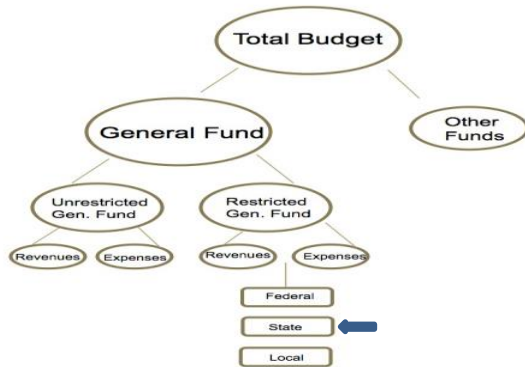
The Federal government provides several grants for programs for exceptional children.

- Federal resources are anticipated to provide approximately **\$10.4** million toward the **\$97.8** million cost of OUSD's Programs for Exceptional Children (PEC), or about **11%**.
- Federal funds support:
 - Special Education and related services for Preschool children, and infants and toddlers
 - Early Intervention Services for PreK-12 pupils not identified as special education
 - Educationally-related mental health services
 - Staff professional development
 - Transition high school students with disabilities into meaningful employment and/or post-secondary education

2016-17 BUDGET

RESTRICTED GENERAL FUND





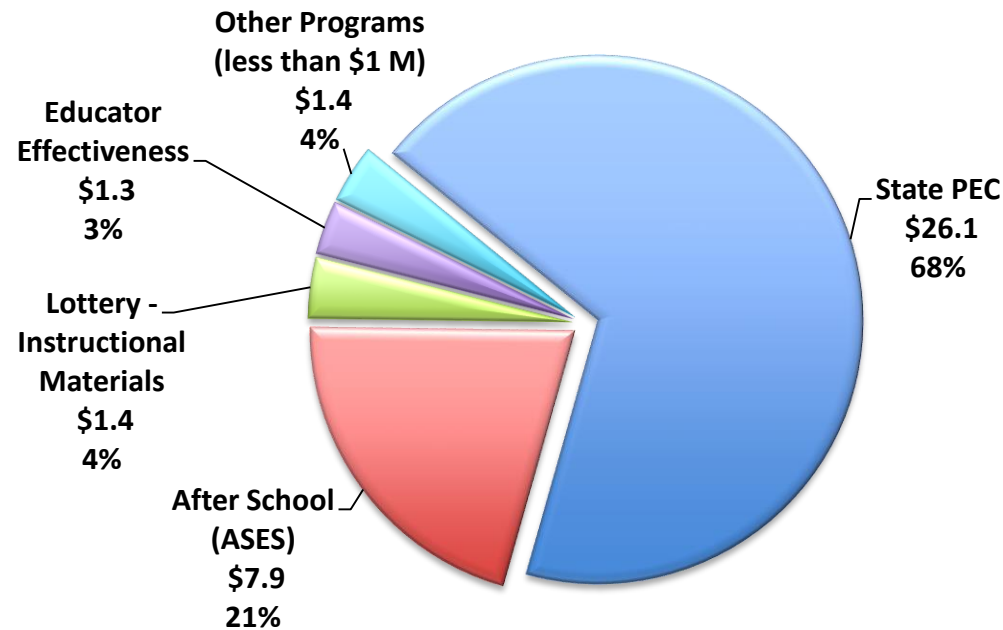
2016-17 Budget

Restricted General Fund

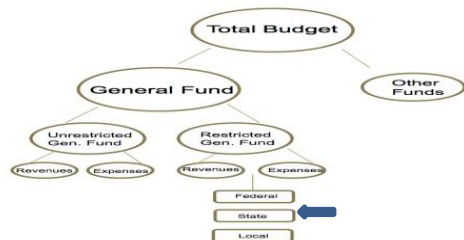
State Funds

(\$ in millions)

Total: \$38.1 M



Change from 2014-15 (2nd Interim): -\$6.0M



Restricted - State PEC Funding

State support for programs for exceptional children includes services for infants to post-high school transitions.

2016-17 Budget

Restricted General Fund

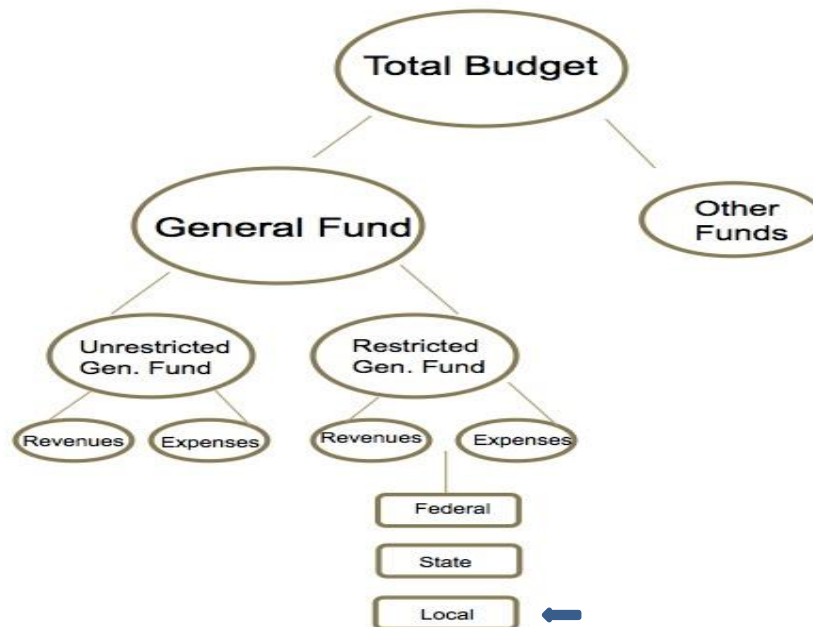
State Resources by Use

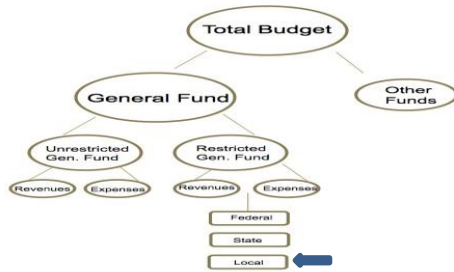
- State funding is anticipated to provide **\$26.1** million toward OUSD's **\$97.8** million cost of PEC, or about **27%**.
- State funding is used to support:
 - Early education services to infants with disabilities
 - Medicaid (mental and health) services to disabled students
 - Transition high school students with disabilities into meaningful employment and/or post-secondary education
 - Identify and assess students with special needs, and provide an individualized continuum of services and programs that allow access to the general education curriculum and meet State grade level standards.

2016-17 BUDGET

RESTRICTED GENERAL FUND

Local Resources



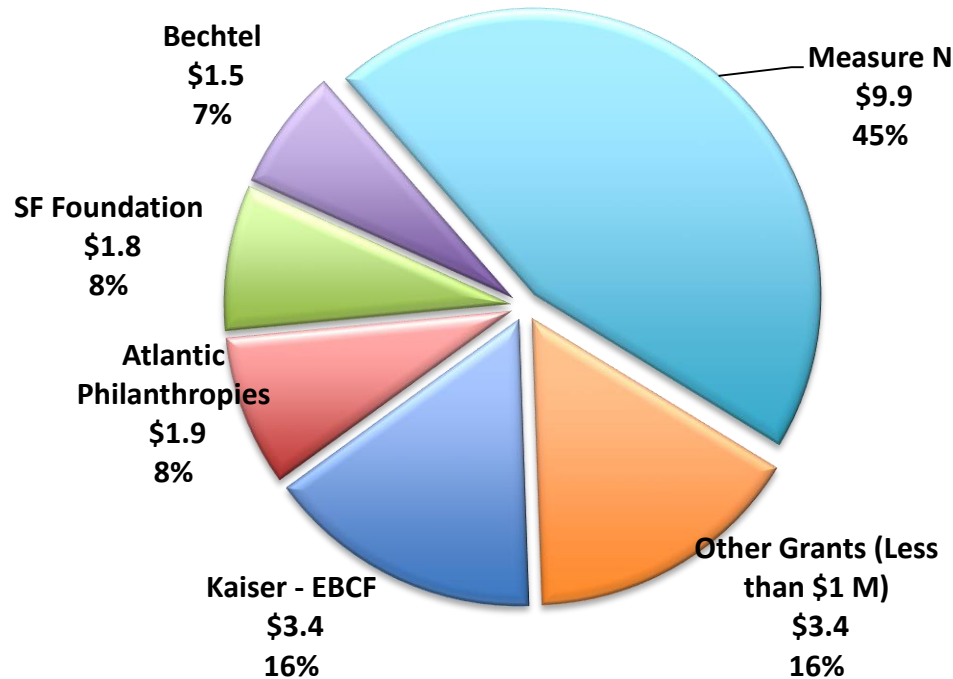


2016-17 Budget

Restricted General Fund

Local Funds (\$ in millions)

Total: \$21.9 M



Change from 2015-16 (2nd Interim): -\$4.4 M

Significant Local Grants

Atlantic Philanthropies

\$11 million over 5 years, starting in 2014-15 (\$8 million to OUSD, \$3 million to Alameda County Health Services)

For development of Health Pathways

Kaiser

\$12 million over 3 years, starting in 2016-17

Strategic planning & implementation, including community schools efforts, health & wellness, and AAMA

Bechtel

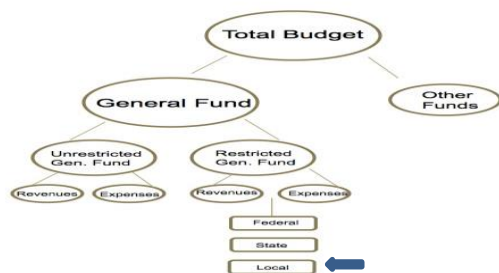
\$3.2 million over 3 years – 16-17 is the last year. In addition, we have a 1-year grant for \$450 thousand .

To implement common core State standards for math in grades K-8.

San Francisco Foundation

\$2.4 million grant over 3 years, starting in 2015-16, for community schools and community-school partnerships

\$1.4 million grant over 3 years, starting in 2015-16, for restorative justice.



Restricted - Measure N (Parcel Tax)

- Passed by Oakland voters on November, 4, 2014, for ten (10) years.
- \$120 per parcel special tax on each taxable parcel in the City.
- Will be used to:
 - reduce the drop-out rate and provide Oakland high school students with real-world work and learning opportunities;
 - prepare students for admission to the University of California and other four-year colleges;
 - expand mentoring, tutoring, counseling, support services, and transition to job training programs.

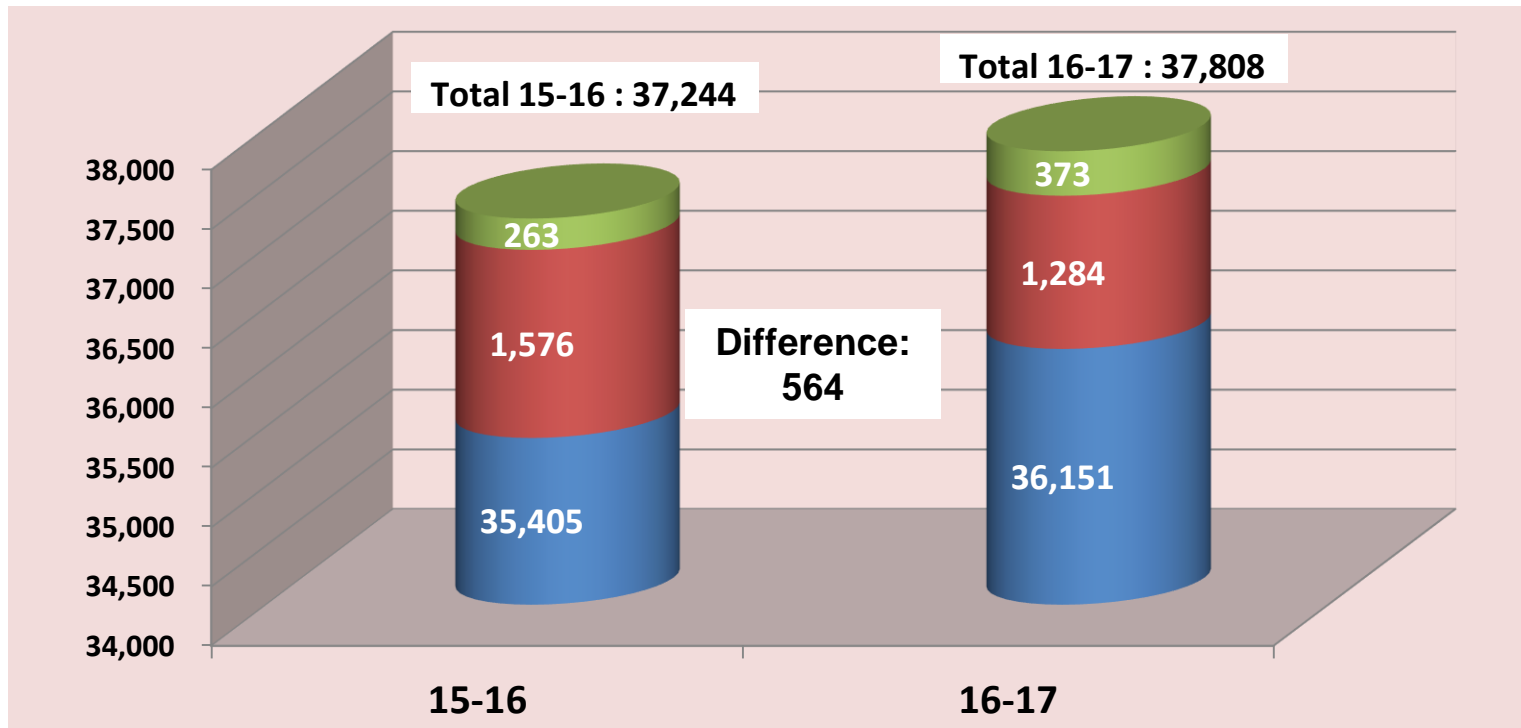
2016-17 Budget Restricted General Fund Local Funds

- Revenues are allocated on a per pupil basis for grades 9-12, plus transition from 8th to 9th and 12th to higher ed. Per pupil rate is projected to be **\$850**.
- Schools must submit plans to the Measure N Citizen's Oversight Committee for review.
- The District expects about **\$9.9 million** for OUSD, which is net of portion that goes to charters.
- 10% of resources are available for District overhead/oversight of program.

2016-17 BUDGET SCHOOL SITE BUDGETS

2016-17 Budget School Site Budgets

TK-12 Enrollment



■ Non-SDC Enrollment
 ■ SDC Enrollment
 ■ Latecomer (post 20-day) Enrollment*

**Note: Latecomers are students who arrive after the official 20-day enrollment count.*

2016-17 Budget

School Site Budgets

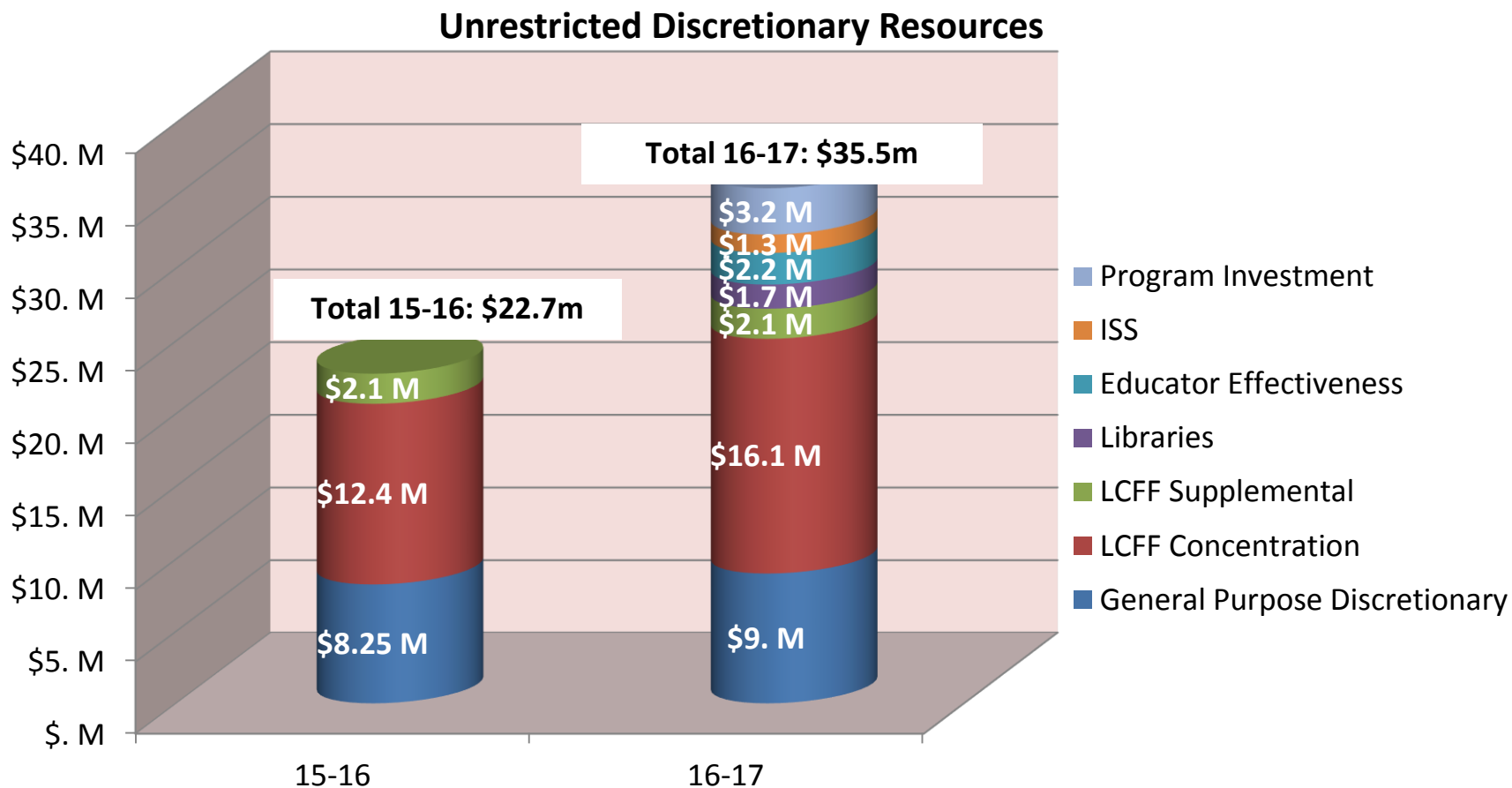
Unrestricted Discretionary Resources

Discretionary funds in the following chart reflect the dollars available for spending **after** sites completed their site-based decision-making process, which may have included purchasing additional positions.

Also reflected are the additional funds for **libraries, educator effectiveness, and program investments** that are new this year.

2016-17 Budget

School Site Budgets



2016-17 Budget

School Site Budgets

Restricted Resources

Restricted resources in school budgets include **Title I, federal and state after-school programs, and local grants and donations.**

Title 1 in 2015-16 includes prior year carryover.

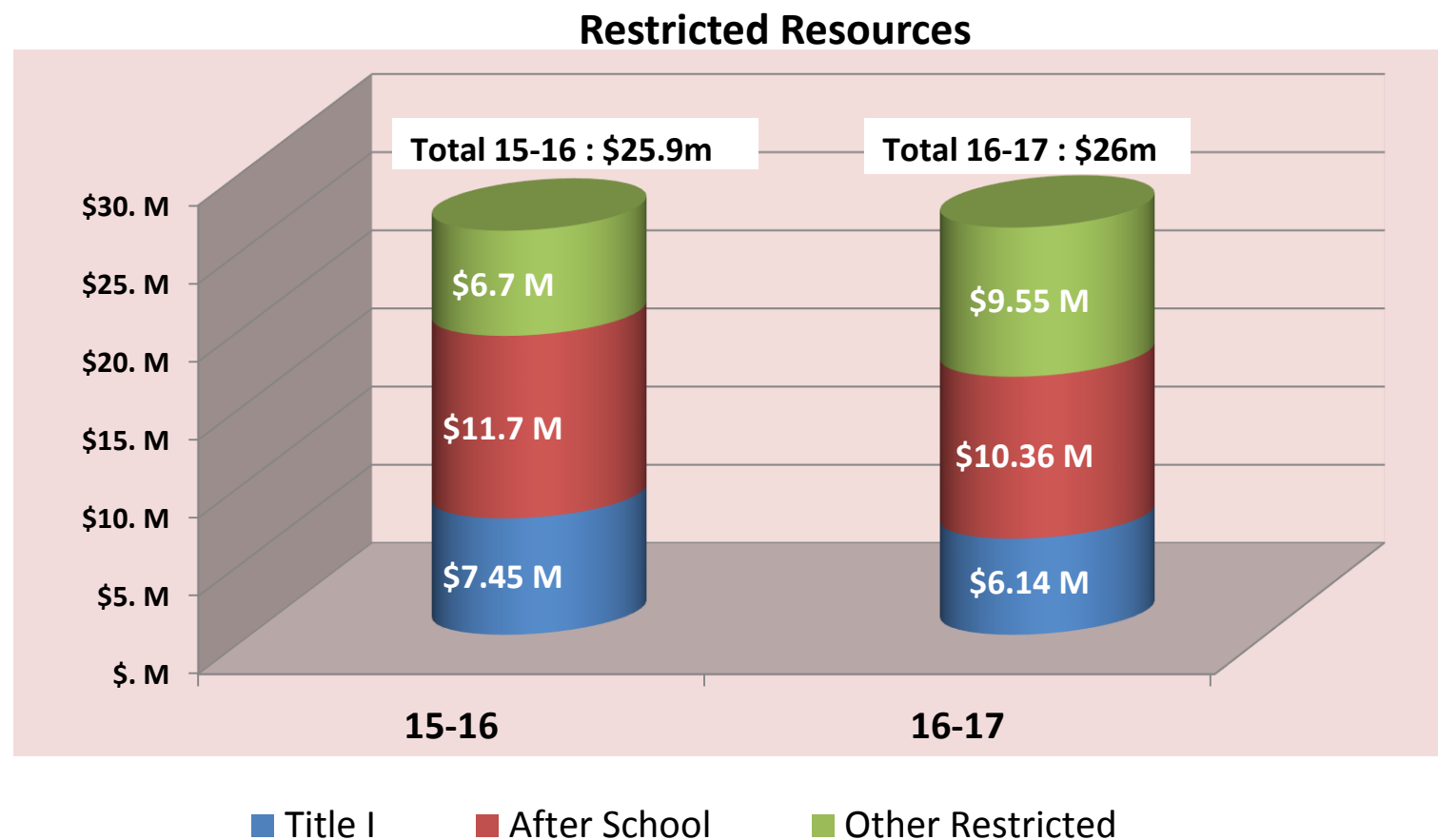
The after school program grant awards are reduced in 2016-17.

Also include in Other Restricted are the full grant amount for **Measure N** to high schools; 2015-16 was a planning grant.

Note: 16-17 after school budget allocations are preliminary, pending final notification of awards from the state.

2016-17 Budget

School Site Budgets





Next Steps

Next Steps

Final State Budget

The District will need to make adjustments based on the final State Budget.

Additional State resources may be available after the Governor presents the May Revise, or after the final State budget is adopted. Whether on-going or one-time, any additional resources will be shared with District employees through labor agreements.

- 65% of one-time will be a one-time bonus
- 65% of on-going will go into salary schedules

Superintendent and Executive Cabinet will identify recommendations based on the LCAP, stakeholder input, and the Board priorities.

Next Steps Timeline

When	What
May 11	Board Budget Workshop
May 25	Report to Board on May Revise of Governor's Budget
May 25	3 rd Interim Report for 2015-16 provided to Board (and to the County by June 1)
June 8	First Reading of 2016-17 Budget & LCAP
June 15	LCAP PSAC General Meeting
June 22	Final Adoption of the 2016-17 Budget & LCAP

APPENDIX

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Budget Allocations to School Sites

2016-17 Budget Allocations

**How are initial allocations
made to school budgets?**

Budget Allocations to School Sites

What Goes Into Developing School Budgets?

Revenue Projections

Enrollment Projections

District Policy and Strategic Plan

Leadership and Program Directive

School Site Information

**DEVELOPMENT OF BUDGET
WORKSHEETS!**





School Site Allocations

The School Site
Budgeting
Model includes
seven major
components

- **Base staffing** - Required School Site Staff based on enrollment projections by grade by school type (elementary, middle, ect.)
- **Base Discretionary Allocations** - per pupil amount
- **LCFF Supplemental allocations** - per pupil amount based on the number of LCFF eligible students
- **LCFF Concentration allocations** - lump sum based on neighborhood factors (Z-Scores)
- **Restricted funding** - allocated based on a per pupil amount, grantor or program manager
- **Other Discretionary Funds** - based on the School Performance Framework (SPF) **NEW**
- **Centrally funded services** - managed by central departments but charged directly to schools

School Site Allocations: BASE DOLLARS

Schools are allocated base funding to cover the basic educational program at the school. The allocations are outlined over the next few slides.

Base staffing costs are estimated using the districtwide averages. Because these are BASE allocations, the actual dollars are not in play, though they will ultimately be reflected in the budget.

Deviating from the base allocations will require a waiver.

School Site Allocations: BASE Admin & Classified Staffing

School Leaders

All schools get a principal.

Assistant principals (APs) are allocated based on the school type and number of students.

Classified

All sites are allocated at least one clerical admin.

All sites receive an allocation (from .5 FTE* to 2 FTE) for an attendance clerk.

Noon supervisors and additional clerical staff allocations are based on school type and number of students.

Number of students for classified allocations includes special day class (SDC) students.

* FTE= Full Time Equivalent

School Site Allocations: BASE Teachers

Grade	15-16 Ratio	16-17 Ratio	Change
TK, K	24:1	24:1	-
1	24:1	24:1	-
2	24:1	24:1	
3	24:1	24:1	
4-5	31:1	31:1	-
6-12	32:1	32:1	-

Teacher Staffing Ratios

- The Teacher ratios are for general education students only as additional teachers and staff are made available to support SDC students by the Program For Exceptional Children (PEC) Office.
- EEIP (prep teachers) are allocated based on a FTE calculation formula:
 - .2 (one day) divided by (50 minute prep periods) multiplied by # of teachers
 - NOTE: SDC students are not included in EEIP ratios. (PEC pays for prep teachers related to SDC teachers)


School Allocations: BASE Unrestricted Discretionary Funds

Discretionary unrestricted funds per pupil (allocations include SDC) remain unchanged

School Type	2015-16 Amount Per Pupil	2016-17 Amount per pupil	Change
Elementary TK-5	\$175	\$175	-
TK-8	\$200	\$200	-
Middle School (6-8)	\$225	\$225	-
High School (6-12)	\$263	\$263	-
High School (9-12)	\$300	\$300	-

School Site Allocations: Supplemental & Concentration Funding

Funding	Based On	2015-16	2016-17	Change
Supplemental	LCFF target students (Low Income, English Learners, & Foster Youth)	\$12,379,000	\$16,099,000	\$3,720.000
May Revise	Same as above	\$3,720,000	?	(\$3,720,000)
Concentration	Z Score of School	\$2,075,000	\$2,075,000	-
TOTAL		\$18,174,000	\$18,174,000	\$ -



Concentration Allocations	Z Score of School	2015-16	2016-17	Change
	Z=6 (10 schools)	\$100,000	\$100,000	-
	Z=5 (11 schools)	\$50,000	\$50,000	-
	Z=4 (21 schools)	\$25,000	\$ 25,000	-

School Site Allocations: Restricted Funds

School will Receive:

Title 1 Funding	\$6.1 M
-----------------	---------

After School Funding:

After School Education & Safety (ASES)	\$16.6 M
--	----------

21 st Century	\$4.6 M
--------------------------	---------

Measure N (Grades 9-12) - final allocations to be approved by Commission	up to \$850 per pupil
--	-----------------------

Depending on terms of the restricted funds, dollars are allocated by per pupil amounts, grantors request, or program manager

New Unrestricted Allocations for 2016-17

\$12.8 million in additional unrestricted resources will be allocated to schools in 2016-17 (which includes the additional teachers for the Inclusion Pilot and for Newcomers)

The School Performance Framework (SPF) designations will be used to allocate these additional funds to schools.

School Site Allocations:

\$5.3 Million Additional Funds Allocated Based on SPF Designation

SPF Designation	Program Improvement per student award	Educator Effectiveness per student award	# of schools
Red	\$125	\$90	16
Orange	\$95	\$65	37
Yellow	\$75	\$50	16
Green	\$60	\$40	10
Blue	\$40	\$30	5
ISS Add'l Award*	\$10	-	5
Total by Program	\$3.2 million	\$2.1 million	
Total	\$5.3 million		

* For current ISS schools; add'l resources for Call for Quality are separate.

School Site Allocations: **Educator Effectiveness**

Teacher Growth and Development System (TGDS) is the districtwide program for improving educator effectiveness

- **Current central allocation for educator effectiveness will be provided as discretionary funds to schools to implement TGDS.**
- **\$2.1 million will be allocated based on same SPF driven per pupil formula that is used for Additional Discretionary.**
- **All schools must provide for the need to support coverage for peer observers and alternate observers.**

School Site Allocations: Library Services

Funds will be allocated to schools based on SPF designations to be used for library services.

SPF Designation	Per student award	# of schools
K-8 Red Schools	\$42k for 1 FTE Library Tech or .5 FTE Library Tech and \$21k for materials	9
K-8 Orange and Yellow Schools	\$21k for .5 FTE Library Tech	49
Yellow and Orange High Schools	\$42k for 1 FTE Library Tech or .5 FTE Library Tech and \$21k for materials	6
Total Award Amount	\$1.7 million	

School Site Allocations: Call for Quality Schools

\$3.5 million will be used for the Call for Quality Schools Process.

- **2014-15 Call for Quality Schools – continued funding for schools already in the process (Intensive Support Schools).**
- **2015-16 Call for Quality Schools - will identify 8-10 schools to receive additional funding in 2016-17.**
- **2016-17 Call for Quality Schools - will identify additional schools for incubation funding.**

School Site Allocations: Appeals Process

School sites that felt the formula-driven allocation was not sufficient were able to appeal for additional enrollment or teachers (FTEs).

Over \$5 million in additional resources (additional teachers) will be added to school sites with targeted needs.

Criteria for Appeals	# of Appeals (FTE) Granted
• Small bilingual classes	3
• Electives in small middle schools	18
• A-G requirements in small high schools	26
• Enrollment anticipated to be higher than projected (including add'l newcomers)	10
TOTAL Additional Teachers through Appeals:	57



School Site Allocations

Centrally Provided Positions

For the 2016-17 school year budget development process, the following positions may not be traded.

In subsequent years, these, plus additional flexibilities may be made available.

- Custodial Services
- Food Services
- School Security Officers (SSOs)
- Financial Analysts
- Staffing Analysts
- Counselors



School Site Allocations

Counselors and Assistant Principals

- **Counselors**

- Centrally funded and allocated according to an OEA contract-driven formula
- Requirements for student to counselor required ratios indicate need for central allocation formula to be maintained for 16-17
- In 2015-16 there were 25.7 centrally funded counselor FTE's, in 16-17 the number has increased to 32.7 FTE's

- **Assistant Principals**

- The Ratio of Administrators to Teachers (RAT) requirement includes little margin – to avoid significant financial penalties, we cannot increase the number of certificated administrators relative to the number of teachers.

Appendix

School Support

Appendix

School Support

Though not in a school site budget, there are several programs, services and costs that are in our schools that are centrally budgeted and managed.

Examples include:

- Programs for Exceptional Children (PEC)

- Arts & Music programs

- Health programs, including some nurses & counselors

- Arts & Music

- Transportation for PEC students

The table that follows list the departments and their costs that provide school support within the Unrestricted General Fund.

Appendix

School Support



Unrestricted General Fund		\$ 115.82	
School Support		<i>in millions</i>	
By Department	\$ in millions	Amount	\$ in millions
975 - Special Education (Unrestricted support)	\$ 51.92	912 - Office of Post-Sec.Readiness	\$ 1.55
988 - Buildings & Grounds	\$ 14.74	944 - Human Resources Services	\$ 1.53
995 - Transportation	\$ 10.35	989 - Custodial Services	\$ 1.48
998 - Districtwide School Support	\$ 9.90	929 - African-American Male Achmt	\$ 1.02
922 - Comm. Schools & Student Servic	\$ 4.30	915 - Ed Effectiveness	\$ 0.99
994 - OUSD Police Department	\$ 3.27	937 - Summer Programs	\$ 0.97
968 - Health Services (Nurses)	\$ 2.93	956 - Continuous School Improvement	\$ 0.89
909 - Teaching & Learning	\$ 2.43	910 - Early Childhood Development	\$ 0.82
948 - Research Assessment & Data	\$ 2.09	954 - English Language Learner/Multilingual	\$ 0.56
907 - Student Assignment	\$ 1.86	924 - New Elevation Network	\$ 0.55
933 - Oakland Athletic League (OAL)	\$ 1.57	918 - Facilities Planning	\$ 0.12
Total			\$ 115.82

Appendix

Infrastructure

Appendix

Infrastructure

As a large organization with over 4,000 employees, OUSD has an infrastructure that supports its operations. Infrastructure costs include:

- Human Resources

- Fiscal Operations

- Communications

- Insurance / Risk Management

- Supervision / Management

- Facilities Planning

The table that follows list the departments and their costs that are included in infrastructure in the Unrestricted General Fund.

Appendix

Infrastructure



Unrestricted General Fund		\$29.5	
Infrastructure		\$ in Millions	
By Department			
986 - Technology Services	\$ 5.01	905 - Office of Sr. Business Officer	\$ 0.84
944 - Human Resources Services, Supp	\$ 3.16	940 - Board of Education	\$ 0.80
958 - Communications	\$ 2.33	909 - Teaching & Learning	\$ 0.72
946 - Legal Counsel	\$ 2.18	990 - Procurement & Distribution	\$ 0.62
951 - Budget	\$ 1.82	902 - Accounts Payable	\$ 0.59
936 - Accounting	\$ 1.59	961 - Pre K-5 Network 1	\$ 0.49
941 - Office of the Superintendent	\$ 1.37	965 - Middle School Network	\$ 0.30
912 - Office of Post-Sec.Readiness	\$ 1.06	962 - Pre-K-5 Network 2	\$ 0.27
947 - Charter Schools Office (Admin)	\$ 1.00	963 - Pre-K-5 Network 3	\$ 0.26
964 - High School Network	\$ 0.99	906 - Ombudsman	\$ 0.26
922 - Comm. Schools & Student Services	\$ 0.98	980 - Chief Financial Officer	\$ 0.22
983 - Payroll	\$ 0.94	979 - Printing and Mail Services	\$ 0.19
913 - Chief of Operations	\$ 0.92	945 - Office of State Trustee	\$ 0.11
903 - Office of Chief Academic offic	\$ 0.86	950 - Office of Accountability Partn	\$ 0.07
992 - Warehouse Distribution	\$ 0.85	Districtwide Expenses	\$ (1.31)
TOTAL		\$29.5	

Appendix

Other Funds

Appendix

Other Funds



Per State Code, the District maintains different funds to account for certain restricted resources separate from the General Fund.

Three funds are highlighted here:

- Fund 11 – Adult Education

- Fund 12 – Child Development

- Fund 13 – Cafeteria

The other funds are:

- Facilities funds (Fund 21, 25, 35, 40)

- Bond Interest and Repayment Fund (Fund 51)

- Self Insurance Fund (Fund 67)

Appendix

Fund 11 – Adult Education

Fund Overview

Accounts for Federal, State and local revenues and expenditures for Adult Education Programs.

- ☐ The funds primarily go towards salaries: 14 full-time teaching and office staff, 17 part-time teaching staff and 15 part-time babysitting staff for the following programs:
- ☐ General Education Development (GED) test preparation/instruction:
 - ☐ OUSD schools: McClymonds, Madison, Korematsu, and Esperanza.
 - ☐ Community: Allen Temple, Salvation Army.
 - ☐ Community College: Merritt College
 - ☐ Continuation schools: Rudsdale
- ☐ Authorized GED testing offered at McClymonds.
- ☐ Family Literacy instruction:
 - ☐ ESL Family Literacy at 7 sites: Fruitvale, La Escuelita, Korematsu, Esperanza, Allendale, Coliseum College Prep Academy, and Martin Luther King, Jr..
 - ☐ Computer Family Literacy at 3 sites: mobile classroom locations TBA.
- ☐ CTE instruction for Project SEARCH, year-long work internships at Children's Hospital and the County of Alameda.
- ☐ College and Career Readiness instruction:
 - ☐ ESL and Adult Basic Education at 3 sites: MetWest High, Allen Temple, Merritt College
 - ☐ Integrated Education and Training: Laney College

Appendix

Fund 11 – Adult Education (cont.)



- Adult Education Block Grant (Resource 6391):
 - Teacher salaries, babysitter salaries
 - Co-fund administrative and clerical support salaries
 - Leases, equipment, books, supplies
- WIOA Grant (Resources 3905, 3913, 3926):
 - Data, staff salaries
 - Equipment, books, supplies
- Private Industry Council (Resource 9214):
 - Teacher salaries for Project SEARCH
- Fund Balances from 2015-16 (Resources 0000, 0506):
 - Teacher salaries for instruction at Continuation school
 - Supplies

Appendix

Fund 12 – Early Childhood Education

Fund Overview

Accounts for Fed, State and local revenues and expenditures for Child Development Programs.

- ❑ Early Childhood Education (ECE) program serves preschool children, 3-4 years of age and school aged children in grades TK- 3rd.
- ❑ ECE classrooms are located in elementary schools or in separate buildings (CDC's – Child Development Centers) on or near elementary campuses.
- ❑ The curriculum includes instruction in Early Literacy, Math, Science, Art, Gross and Fine Motor Skills, and Social/Emotional Development.
- ❑ The ECE instructional program is rooted in the California Preschool Learning Foundations and is aligned with Common Core State Standards.
- ❑ The Early Childhood Program also supports an Afterschool Care Program (School Age) for students TK-3rd.

Preschool Education Program for Children

- Full-Day, year-round preschool
- Half-Day, (3 hour) preschool AM and PM Sessions which follow the K-12 school calendar.

Afterschool Care Program for Children TK-3rd grades

- Full-Day during the summer and on teacher planning days
- Half-Day, afterschool on regular and minimum days during the school year

Appendix

Fund 12 – Child Development, Continued



- There are 55 OUSD ECE classrooms throughout Oakland Unified School District
 - 26 – Full Day Preschool classrooms – serving 572 students
 - 29 – 3-Hour Preschool classrooms – serving 888 students
 - Total ECE Students Served - 1515
 - 10 – School-Age classrooms (After School Program) – serving 280 students grades TK-3rd Grade
- Students and families must qualify for enrollment in OUSD ECE through the ECE Eligibility and Enrollment Office
 - All students must meet state income requirements to qualify for OUSD ECE
 - For full day programming students must meet state income requirements as well as demonstrate need for services.
 - All families must complete an OUSD ECE application packet and submit required documentation to enroll children in the OUSD ECE program

Appendix

Fund 13 – Cafeteria Fund



Fund Overview

Accounts for Fed, State and local revenues and expenditures for National School Lunch Program. Supports the District's and national initiatives to provide nutritious meals and nutrition education to all TK-12 schools and Child Development Centers. The mission is to ensure that all of our children develop healthy lifestyles that allow them to focus on academic achievement.

PROGRAMS

Cafeteria Programs

- National School Lunch Program:
 - lunches are provided at all school sites
 - breakfast at 77 school sites
 - after school snack at 70 school sites
 - supper at 25 school sites
- Child Care Food Program: breakfast, lunch, & snacks are served at Child Development Centers.

Through these programs, Nutrition Services serves over six million meals per year.

Oakland Fresh Produce Markets

- Weekly after school produce markets providing locally grown, organic, & pesticide free produce to 15 school sites.

Farm to School Program

- An procurement program that emphasizes purchases from farms & businesses within 250 miles of Oakland & State of California. Some purchases include organic beef from Sonoma & pasta from Oakland based company.

Appendix

Fund 13 – Cafeteria, continued



Programs, Continued

☐ **Fresh Fruit & Vegetable Program**

- A fresh fruit or vegetable snack is provided to students three days per week at 18 elementary schools.

☐ **Salad Bars**

- Salad bars are provided at 53 schools to increase access & consumption of fresh fruit & vegetables.

☐ **California Thursdays**

- Through a Joint venture with Center for Ecoliteracy, a freshly prepared lunch with ingredients sourced entirely from California growers & producers is served one day per week.

Innovations

☐ **Central Kitchen, Education Center, & Instructional Farm- Ceremonial Groundbreaking on April 7, 2016!!!**

- A new central kitchen & education center will be built on the current Marcus Foster site. With this new facility, Nutrition Services will be able to:
 - Eliminate 80% of the pre-packaged meals currently served
 - Increase procurement from local sources
 - Increase the amount of freshly prepared items served to students
- The new meal plan will also require updates of school site kitchens.
- The facility will also house an education center for use by Nutrition Services employees, students, & community members.
- A 1.0 acre instructional farm will be created that will provide additional educational opportunities for students, families, & the community including Linked Learning & Career Pathways.

Appendix

Facilities Funds



Fund Overview

Several funds specific to facilities allow for separate accounting of different resources that are restricted to be used for capital projects

CAPITAL PROGRAM FUNDS

Fund 21 – Building Fund

- All bond proceeds from voter-approved bonds are held Fund 21.
- **Measure B** was approved by voters in 2006 for \$435 million.
 - In 2016-17, the District will issue the final **\$65 million** of Measure B bonds.
- **Measure J** was approved by voters in 2012 for \$475 million.
 - The District has issued \$300 million and expects to issue and spend the remaining \$175 million over the next three years.

Fund 25 – Capital Facilities Fund

- Any funds from developer's fees or funds redevelopment projects earmarked for capital projects are held in Fund 25.
- The District expects to about **\$1.5 million** from developments in Oakland in 2016-17.

Fund 35 – County School Facilities fund

- Funds from the State Facilities Program are held in Fund 35.
- The District does not anticipate any additional State funds unless a new State-wide bond measure is approved.



EVERY STUDENT THRIVES!



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