



**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

Superintendent's Work Plan 3a

October 26, 2016 Update



Presented to Board of Education

October 26, 2016



Superintendent Work Plan #3a

Present a fiscally sound budget for the 2017-18 school year for approval to the Board of Education that aligns budget development and LCAP community engagement process (Board Policy 3100)

3a: Theory of Action

IF OUSD...

is able to prepare a fiscally sound budget for 2017-18 through an aligned and transparent process,

THEN ...

the Board, staff, parents and community will understand the intentional investments and trade-offs to be made,

AND AS A RESULT...

students will benefit from targeted and thoughtful investments.



Plan for Success

Strategies to Ensure Work Plan Goal is Achieved:

- **Calendar** - Board calendar and operational calendar ensure sufficient time to complete the work with integrity and meet all required timelines.
- **Priority Setting** – Pathways to Excellence and the Local Control Accountability Plan (LCAP) set the direction for all budget decisions
- **Numbers** – Keep all eyes on the moving target of 2016-17 funding and the impact on OUSD.
- **Collaboration** – Community voices are included through a meaningful and transparent process.
- **Tools** – Tools used by schools and central staff to develop the budget are improved and integrated.
- **Training & Communications** – Training materials & communications are easy to understand.

Calendar For 2016-17 Budget Development

Legend:
Completed
Current
Board Meeting

	Board Item	Activity Type	Date
1	LCAP Parent & Student Advisory Committee (PSAC) "Retreat"	Engagement	August 13, 2016
2	Review Calendar for 2017-18 LCAP and Budget Engagement	Supt's Rpt	September 14, 2016
3	Review Board Priorities for 2017-18 Budget	Discussion	October 13, 2016
4	LCAP PSAC General Meeting	Engagement	October 19, 2016
5	LCAP Engagement with Labor representatives	Engagement	October 20, 2016
6	Executive Cabinet Prioritization Process	Staff Work	Oct. - Nov. 2016
7	Progress report on 2017-18 LCAP and Budget Development	Supt's Rpt	October 26, 2016
8	Progress report on 2017-18 LCAP and Budget Development	Supt's Rpt	November 30, 2016
9	LCAP PSAC General Meeting	Engagement	December 7, 2016
10	Board review and approval of 1st Interim Financial Report for 2016-17 w/ multiyear projections	Action	December 14, 2016
11	Budget Guidelines and "One-Pagers" provided to Schools	Schools	Early January 2017
12	Budget Tool available to Schools & Central Offices	Schools	Early January 2017
13	Review Governor's Proposed 2017-18 State Budget	Staff Report	January 25, 2017
14	School Site Councils Review Site Budgets	Engagement	Jan & Feb 2017
15	Progress report on 2017-18 LCAP & Budget Development	Supt's Rpt	February 8, 2017
16	LCAP PSAC General Meeting	Engagement	February 15, 2017
17	Schools and Central Offices Lock-in 2017-18 Budgets	Schools	End of February 2017
18	Board review and approval of 2nd Interim Financial Report for 2016-17 w/ multiyear projections	Action	March 8, 2017
19	Superintendent submits potential 2017-18 Employee Additions, Reductions, Eliminations, or Reclassifications	Action	March 8, 2017
20	LCAP Engagement for Staff & Labor	Engagement	March 23, 2017
21	Progress report on 2017-18 LCAP & Budget Development	Supt's Rpt	April 12, 2017
22	LCAP PSAC General Meeting	Engagement	April 19, 2017
23	2017-18 LCAP and Budget Study Session	Discussion	May 10, 2017
24	LCAP PSAC General Meeting	Engagement	May 17, 2017
25	Review Governor's 2017-18 Revised State Budget	Staff Report	May 24, 2017
26	1st Reading of 2017-18 LCAP and Budget	Discussion	June 14, 2017
27	LCAP PSAC General Meeting	Engagement	June 21, 2017
28	Approve OUSD 2017-18 LCAP and Budget	Action	June 28, 2017

Milestones Driving Budget Prioritization

Activities & Milestones	School Year 2016-17 - Next 6 Months									
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
Develop budget calendar for 2017-18	9/20									
Prepare and plan for First Week in October - share process and schedule with SLT, Executive Cabinet and Cabinet		10/3 10/7								
Board prioritization session		10/13								
Prioritization Sessions with SLT - November 8 & November 28			11/8 11/28							
SSCs meet with Principals to review data and determine priorities for 2017-18 budget			During Nov.							
School & central allocations are calculated & budget handbook is completed.				12/15						
Budget allocations provided to school sites and central departments.					1/6					
Budgets locked-in; technical work can begin.						2/28				
March 15 Notices (if required)							3/15			
Update LCAP based on budget to ACOE								4/21		
Board Workshop on 2017-18 Budget									5/10	
Public Hearing on LCAP and Budget										6/14
Board adopts LCAP and Budget										6/28

Priority Setting

Pathway to Excellence and Local Control Accountability Plan (LCAP)



October:

- Confirm Board and Superintendent priorities for 2016-17.
- LCAP Parent-Student Advisory Council reviews priorities for 2016-17 and 2017-18.

November:

- Develop recommendations with SLT for specific district-wide budget adjustments.
- Principals will meet with SSCs to develop school site priorities.

Priorities Identified by Board

- Academic Program
- Social Emotional Learning
- Innovation in Schools





Numbers

Situation:

Despite overall increased revenue, OUSD commitments, declining enrollment and reduced *incremental* revenue from LCFF have combined to create an estimated district-wide budget challenge for 2017-18.

Complication:

The district must maintain and possibly increase the current *level* of S&C investment.



Resolution:

To move the needle forward for our students, while maintaining fiscal solvency, we have to thoughtfully identify our priority areas and also where dollars can be reallocated and/or reduced.

Collaboration



**The LCAP
Engagement
Calendar is
designed to
allow
opportunities
to engage,
inform, and
share.**

- ✓ **English Learners' Sub-Committee**
 - September 15
- ✓ **Parent Student Advisory Committee (PSAC)**
 - October 19
- ✓ **Superintendent Forums**
 - October 6, October 20 (All City Council)
- ✓ **Labor Partners**
 - October 20
- ✓ **Foster Youth Advisory Committee**
 - September 27, October 25

Tools



Tool for Central Offices: A revised tool has been developed for Central sites to use to build budget suggestions for 2017-18.

The Single Plan for Student Achievement (SPSA) to be used by school sites is being updated to incorporate LCAP and budget information more seamlessly.





Communication & Training

Board: Monthly updates to the Board on the LCAP and budget development process.

Leadership: Weekly communications, including discussions on priority setting.

Schools: Working through Network leaders and partners, will provide budget process information in October, & sample materials to use with SSCs in November.



End Results

MAY 10, 2017 – Board Budget Workshop
JUNE 14, 2017 – LCAP and Budget First Reading
JUNE 28, 2017 – LCAP and Budget Final Adoption



EVERY STUDENT THRIVES!



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Appendix



Sub Goal 3a

Present a fiscally sound budget for the 2017-18 school year for approval to the Board of Education that aligns budget development and LCAP community engagement process (Board Policy 3100).

Impact by June 2017	2018-2019	2019-2020
<ol style="list-style-type: none"> 1. Executive Cabinet, Board, PAC, DBAC, and PSAC understand: <ul style="list-style-type: none"> ● The process and reasons behind decisions made during the budget process. ● The relationship between budgets and outcomes. ● How LCAP and budget are aligned. 2. Substantive decisions are made that will result in a balanced budget. 3. Budget needs that could and should have been known and included in the budget do not pop up late in the process. Discipline around decisions. 4. Ownership for results, especially fiscal solvency, is held by leadership across the District, not just fiscal. 5. LCAP and budget are completed in time for sufficient review and approval by ACOE. 	<ol style="list-style-type: none"> 1. Improve process based on lessons learned. 2. Improve budget knowledge of program managers. 3. Position the District to be on sound financial ground: 3% reserve, on-going and one-time are appropriately aligned. 	<ol style="list-style-type: none"> 1. Budget decisions are grounded in outcomes. 2. District-wide understanding of budget process.
	<p>Indicators:</p> <ul style="list-style-type: none"> ● Positive LCAP review by County ● Balanced and stable budget ● District stakeholders understand process (will need to survey specific groups) 	

Sub-Goal 3a:

INPUTS	ACTIONS (by when)	OUTCOMES	IMPACT by June 2017
<p><u>Working group:</u> Lisa Spielman - LCAP manager Cintya Molina - LCAP Comm. Engagement Partner Jean Wing - Outcomes Diana Sherman - SPSA coordinator Troy Christmas – transparency tools Katema Ballentine - Budget Director for Budget Development Sandra Anderson-Knox - Budget Director for Operations and Reporting Vernon Hal Dr. Carey Hawkins Ash, Esq. Megan Sweet – Network partner</p> <p>LCAP coded for central</p> <p>Tools:</p> <ul style="list-style-type: none"> ● SPSA ● Budget allocation tool ● Prioritization tool ● BDT ● Central LCAP workbook (COPS) <p>Assumptions about site allocations:</p> <ul style="list-style-type: none"> ● 2016-17 SPF ● LCFF % ● Enrollment per school (need to know feeder patterns, programs at schools, consolidations) ● Amount that will need to be cut 	<p>Working group prepares a Board calendar; Working group presents calendar to Board - SEPT</p> <p>Working group engages with stakeholders to gain input on operational calendar and process. - ONGOING</p> <p>Working group and ERS develop budget planning process that incorporates lessons learned from ERS study - OCT</p> <p>Working group develops basic assumptions and overall budget numbers that are transparent and easy to understand, aligned with LCAP S&C</p> <p>Working group conducts a prioritization session with SLT resulting in cuts and trades. that align with priorities. - NOV</p> <p>Working group creates tools for prioritization, school allocations, budget development sessions, LCAP development, SPSAs - OCT</p> <p>Budget handbook - for schools, central – DEC/JAN</p> <p>Work with communications dept to develop a clear communications plan</p>	<p>Budget calendar(s) - for the Board, Operational, for Sites</p> <p>Budget planning process:</p> <ul style="list-style-type: none"> ● Overall process ● Central Sites ● School Sites ● Restricted Resources ● LCAP input <p>Aligned budget tools:</p> <ul style="list-style-type: none"> ● SPSA ● Site allocation workbook ● Prioritization tool ● BDT ● Central LCAP workbook <p>3% Reserve</p> <p>Budget aligned to resources - one-time versus on-going.</p> <p>Aligned budget process focused on priorities.</p> <p>Sites, central, PSAC Board all have input into the process.</p> <p>LCAP submissions meet deadlines set by County.</p> <p>60% of participants</p> <ul style="list-style-type: none"> ● feel it was a transparent process ● understand decisions that were made ● Can explain the budget process & priorities. ● Timely and accurate information 	<p>Working group feels all voices were brought to the table and the team carried the load together</p> <p>Board understands what budget decisions were made and why</p> <p>Executive cabinet understands what budget decisions were made and why.</p> <p>Decisions are aligned to priorities developed through collaborative effort.</p> <p>Stakeholders take ownership of recommendations.</p>