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Introduction Date	11-4-15
Enactment Number	15-1794
Enactment Date	11/18/15 <i>OD</i>



Memo

To: Board of Education

From: Jacqueline Minor, General Counsel

Board Meeting Date: November 4, 2015

Subject: **OUSD-Oakland Education Association (OEA) Addendum to Tentative Agreement regarding Changes to Salary Schedule Rates**

Action Requested: Approval by the Board of Education of the Addendum to the Tentative Agreement of May 13, 2015 between the OEA and OUSD regarding changes to rates found in Appendix 1 and Appendix 2 of the Collective Bargaining Agreement.

Summary: The District and Oakland Education Association, representing teachers and other certificated staff, reached the attached Addendum to the Tentative Agreement regarding an increase to rates found in Appendix 1 and Appendix 2, effective July 1, 2015. Further, the parties agreed to delete certain rates, no longer in use, found in Appendix 2.

Recommendation: Approval by the Board of Education of the Addendum to the Tentative Agreement of May 13, 2015 between the District and OEA regarding changes to salary schedules.

Fiscal Impact: General Purpose Fund

Attachments: -Addendum to Tentative Agreement

ADDENDUM TO TENTATIVE AGREEMENT
OF MAY 13, 2015
BETWEEN
OAKLAND EDUCATION ASSOCIATION
AND
OAKLAND UNIFIED SCHOOL DISTRICT

The parties agree as follows:

The increases agreed to for all schedules, substitute rates and adult education hourly rates for the 2014-15 school year shall be applied to all other rates and schedules in Appendix 1 effective **July 1, 2015**.

An increase of 5.596% (2%, 1% and 2.5% compounded), shall be applied to these rates and schedules effective **July 1, 2015**. The previously agreed to increases in these rates and schedules for the 2015-16 school year shall also go into effect as scheduled, 2.5% effective January 1, 2016 plus such other on-going compensation as may be generated by the contingency language in the Tentative Agreement on Article 24 dated May 13, 2015. In no event shall this be interpreted to mean that these rates and schedules are to be increased prior to July 1, 2015.

Further, the parties agree to delete the following rates in Appendix 2:

Inservice Activities

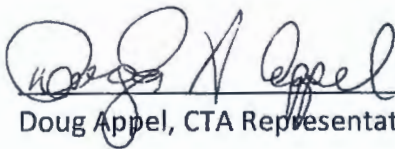
Participation in Approved Programs \$15.96 Hourly

Adult Education Not on the Salary Schedule \$31.46 Hourly

FOR THE OEA:

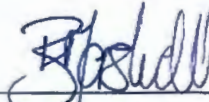


Trish Gorham, President

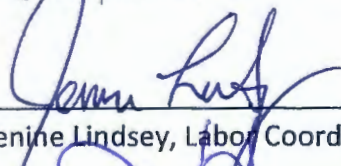


Doug Appel, CTA Representative

FOR THE DISTRICT:



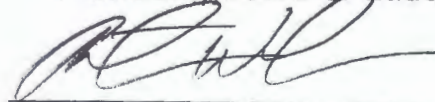
Brigitte Marshall, Chief Talent Officer



Jenine Lindsey, Labor Coordinator




James Harris
President, Board of Education



Antwan Wilson
Secretary, Board of Education



MEMORANDUM

DATE: October 27, 2015

TO: Board of Education

FROM: Superintendent Antwan Wilson *AW*
Vernon Hal, Senior Business Officer *VH*
Ruth Alahydoian, Chief Financial Officer *RA*

RE: AB1200 Public Disclosure Documentation for Addendum to OEA Tentative Agreement

California Government Code Section 3540.2 requires a school district with a qualified report certification to submit any proposed (tentative) collective bargaining agreement to the county office for review and comment prior to approval by the board. OUSD has a "qualified" certification and is subject to this requirement. The district must provide the county with all information relevant to yield an understanding of the financial impact of that agreement.

The proposed Addendum to the Tentative Agreement of May 13, 2015 (TA), between Oakland Education Association (OEA) and Oakland Unified School District (OUSD) applies a 5.596% increase to the rates and stipends in Appendix 2 of the TA effective July 1, 2015. The cost of this agreement was already included in the cost estimates submitted as part of the original OEA disclosure. Attached to this memo is the original disclosure for reference.

No additional costs will be incurred by the adoption of this addendum.

**Certification of the District's Ability to Afford the Costs of a Collective
Bargaining Agreement**

This disclosure document must be signed by the District Superintendent and Chief Business Official prior to the public disclosure.

The District projects the total monetary cost of the settlement to be as follows:

Year 1:	\$ 0
Year 2:	\$ 0
Year 3:	\$ 0

Please check one of the following:

☒ **No budget revisions are necessary for the District to afford this settlement
(Revisions were already calculated and included in prior disclosure document)**

☐ **Budget revisions are necessary for the District to afford this settlement. These revisions are itemized below. The District's budget assumptions are attached, which become an integral part of this document.**

Note that if the District does not adopt all of the revisions in the current fiscal year, the County Superintendent is required to issue a qualified or negative certification on the next Interim Report per Government Code (GC) 3547.5(c).

Budget Adjustment Categories	Increase (Decrease) Year 1	Increase (Decrease) Year 2	Increase (Decrease) Year 3
Revenues/Other Financing Sources			
BUDGET REVISIONS WERE INCLUDED IN PRIOR AB1200 DISCLOSURE SUBMISSION FOR OEA TA APPROVED BY BOARD ON JUNE 10, 2015			
Expenditures/Other Financing Uses			
Ending Balance Increase (Decrease)			

In accordance with the requirements of Government Code Section 3547.5, the Superintendent and Chief Business Official of the **Oakland Unified School District** hereby certify that the District can meet the costs incurred under the Collective Bargaining Agreement between the District and the **Oakland Education Association** Bargaining Unit(s), during the term of the agreement, from **July 1, 2015** to **June 30, 2017**.

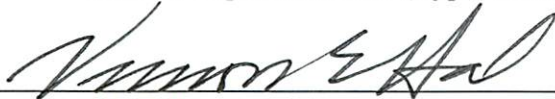


District Superintendent (Signature)

Antwan Wilson

10/30/15
Date

District Superintendent (Type Name)



Chief Business Official (Signature)

Vernon Hal

10-30-15
Date

Chief Business Official (Type Name)

ADDENDUM TO TENTATIVE AGREEMENT
OF MAY 13, 2015
BETWEEN
OAKLAND EDUCATION ASSOCIATION
AND
OAKLAND UNIFIED SCHOOL DISTRICT

The parties agree as follows:

The increases agreed to for all schedules, substitute rates and adult education hourly rates for the 2014-15 school year shall be applied to all other rates and schedules in Appendix **2** effective **July 1, 2015**.

An increase of 5.596% (2%, 1% and 2.5% compounded), shall be applied to these rates and schedules effective **July 1, 2015**. The previously agreed to increases in these rates and schedules for the 2015-16 school year shall also go into effect as scheduled, 2.5% effective January 1, 2016 plus such other on-going compensation as may be generated by the contingency language in the Tentative Agreement on Article 24 dated May 13, 2015. In no event shall this be interpreted to mean that these rates and schedules are to be increased prior to July 1, 2015.

Further, the parties agree to delete the following rates in Appendix 2:

Inservice Activities

Participation in Approved Programs \$15.96 Hourly

Adult Education Not on the Salary Schedule \$31.46 Hourly

FOR THE OEA:



Trish Gorham, President

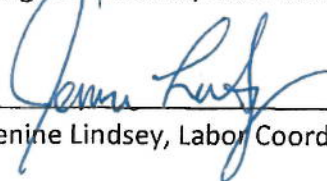


Doug Appel, CTA Representative

FOR THE DISTRICT:



Brigitte Marshall, Chief Talent Officer



Jenine Lindsey, Labor Coordinator

Original Disclosure for OEA TA

Certification of the Districts Ability to Meet the Costs of Collective Bargaining Agreement

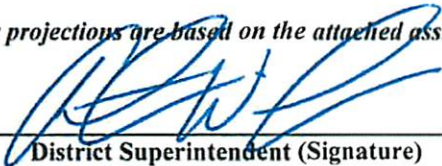
This disclosure document must be signed by the District Superintendent and Chief Business Official prior to the public disclosure.

In accordance with the requirements of Government Code Section 3547.5, the Superintendent and Chief Business Official of **Oakland Unified School District**, hereby certify that the District can meet the costs incurred under the Collective Bargaining Agreement between the District and the **Oakland Education Association**, during the term of the agreement from 7/1/2014 to 6/30/2017.

The budget revisions necessary to meet the costs of the agreement in each year of its term are itemized below. If the District does not adopt all of the revisions in the current fiscal year, the County Superintendent is required to issue a qualified or negative certification on the next Interim Report per Government Code (GC) 3547.5(c)


Budget Adjustment Categories	Increase(Decrease) Year 1	Increase(Decrease) Year 2	Increase(Decrease) Year 3
<u>Revenues/</u> Other Financing Sources	2014-2015	2015-2016	2016-2017
	\$0	\$0	\$0
<u>Expenditures/</u> Other Financing Uses	2014-2015	2015-2016	2016-2017
	\$4,204,852	\$12,027,272	\$18,341,561
Ending Balance Increase (Decrease) Associated revenue and expenditures associated with this agreement will net to \$0	(\$4,204,852)	(\$12,027,272)	(\$18,341,561)

These projections are based on the attached assumptions, which become an integral part of this document.


District Superintendent (Signature)

ANTWAN WILSON

District Superintendent (Type Name)


Senior Business Officer (Signature)

VERNON HAL

Senior Business Officer (Type Name)

5/29/15
Date

5/29/15
Date

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of Bargaining Units: _OEA_ Certificated ☒ Classified

The proposed agreement covers the period beginning 07/01/2014 and ending _06/30/2017_

and will be acted on by the Governing Board at its meeting on 06/10/15 (Date).

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action.

A. Proposed Change in Compensation

Compensation		Annual Cost Prior to Proposed Agreement FY 2014-2015	Fiscal Impact of Proposed Agreement		
			Year 1 Increase/(Decrease) FY 2014-2015	Year 2 Increase/(Decrease) FY 2015-2016	Year 3 Increase/(Decrease) FY 2016-2017
1.	Salary Schedule (This is to include Step & Column, which is also reported separately in item 6)	\$ 139,669,521	\$ 3,505,705	\$ 6,521,774	\$ 5,264,918
			2.51%	4.67%	3.77%
2.	Other Compensation Stipends, Bonuses, Longevity, Overtime Differential, Callback or Standby Pay, etc.		\$ -	\$ -	\$ -
			0.00%	0.00%	0.00%
2a.	Description of Other Compensation			\$ -	\$ -
3.	Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.	\$ 23,298,056	\$ 584,781	\$ 1,087,887	\$ 878,233
			2.51%	4.67%	3.77%
4.	Health/Welfare Plans	\$ -	\$ -	\$ -	\$ -
			0.00%	0.00%	0.00%
5.	Total Compensation - Add Items 1 through 4 to equal 5	\$ 162,967,577	\$ 4,090,486	\$ 7,609,661	\$ 6,143,151
			2.51%	4.67%	3.77%
6.	Step & Column - Due to movement plus any changes due to settlement. This is a subset of item No. 1.	\$ -	\$ -	\$ -	\$ -
7.	Total number of represented Employees (Use FTEs)	2412.66	2412.66	2412.66	2412.66
8.	Total Compensation <u>Average</u> Cost per Employee	\$ 67,547	\$ 1,695	\$ 3,154	\$ 2,546
			0.00%	0.00%	0.00%

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

9. What was the negotiated percentage increase approved? For example, if the increase in "Year 1" was for less than a full year, what is the annualized percentage of that increase for "Year 1"?

For FY 2014-15, all schedules, substitute rates, and adult education hourly rates shall be increased as follows:

2% effective 7/1/2014; 1.0 % effective 2/1/2015; and 2.5 % effective 6/30/2015. The annualized percentage for 2014-15 is 3.01%. To the extent the district receives more 2014-15 resources from the state than projected in third interim (\$296,316,598), 33% will be paid to unit members as a one-time payment by October 31, 2015.

For FY 2015-2016, all rates and schedules shall be increased by 2.5% effective 1/1/2016. This compensation is tied to preparation for the implementation of a 30 minute extension of additional collaboration time for one minimum day per week beginning 2016-17. Additional increases are dependent on additional funds from the State, according to a formula.

For unrestricted funds received by the district in excess of the projected 2015-16 on-going revenues of \$320,370,623, 39% shall be used to provide a salary schedule increase to unit members, with 90% effective July 1, 2015, the remainder effective January 1, 2016. In addition, 39% of any one-time unrestricted revenues will be paid to unit members as a one-time payment by October 21, 2016.

For FY 2016-2017, the on-going increase to OEA Members is fully contingent on the additional revenues the District receives in 2016-17. The increase is calculated as the difference between LCFF funding for 2015-16 compared to 2016-17, using the FCMAT calculator as of May 1, 2016. For purposes of this analysis, we have assumed an increase of \$13.84 million, which is the difference between the LCFF funding amount for 2015-16 and 2016-17, calculated using the FCMAT calculator as of May 1, 2015. The increase is then allocated to unit members by formula: 30% of the first \$5 million, 42% of the next \$4 million, 48% of the next % million, and 39% of any remaining amount.

10. Were any additional steps, columns or ranges added to the schedules? (If yes, please explain.)

No

11. Please Include comments and explanations as necessary. (If more room is necessary, please attach additional sheet.)

N/A

- B. Proposed Negotiated Changes in Non-compensation Items** (e.g. class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

Class sizes for TK-3 are limited to 24:1 average per school - this was already incorporated into the 2015-16 budget.

Counselor ratios are reduced to 600:1 for grades 6-12 (currently at 700:1 for 7-12) - already in 2015-16 budget.

Addition of dental and vision benefits for STIP substitutes (minimal financial impact)

Reimbursement of particular mandatory professional dues for SLPs.

- C. What are the Specific Impacts (Positive or Negative) on Instructional and Support Programs to Accommodate the Settlement?** Include the impact of changes such as staff reductions or increases, program reductions or increases, elimination or expansion of other services or programs (e.g. counselors, librarians, custodial staff, etc.).

Expect positive impact - increased prep time for teachers, lower staffing ratios. Lower staffing has already been incorporated into budget and hiring plans.

In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

1. State Reserve Standard

a. Total Expenditures, Transfers Out, and Uses (Page 4, Column 4, total Expense & Other Uses and Transfers Out <i>(Must include restricted and unrestricted expenditures)</i>	\$ 451,439,794
b. State Standard Minimum Reserve Percentage for this District	2.00%
c. State Standard Minimum Reserve Amount for this District (For districts with less than 1,001 ADA, this is the greater of Line a. times Line b., <u>or</u> \$50,000.	\$ 9,028,796

2. Budgeted Unrestricted Reserve (After Impact of Proposed Agreement)

a. General Fund Budgeted Unrestricted Reserve for Economic Uncertainties	\$ 9,028,796
b. General Fund Budgeted Unrestricted Unassigned/Unappropriated Amount	\$ (0)
c. Special Reserve Fund 17-Budgeted Reserve for Economic Uncertainties	\$ -
d. Special Reserve Fund 17-Budgeted Unassigned/Unappropriated Amount	\$ -
e. Article XIII-B Fund 72-Budgeted Reserve for Economic Uncertainties	\$ -
f. Article XIII-B Fund 72-Budgeted Unassigned/Unappropriated Amount	\$ -
g. Total District Budgeted Unrestricted Reserves	\$ 9,028,796

3. Do unrestricted reserves meet the state standard minimum reserve amount? YES X NO

If NO, how do you plan to restore your reserves?

[illegible]

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Revised MYP Including the Effects of Collective Bargaining

District Name:			
General Fund			
Multi-Year Projections			
Budget Year: 2014-15			
	ADA: 35286.75	ADA: 35286.75	ADA: 35286.75
	COLA:	COLA:	COLA:
	Deficit:	Deficit:	Deficit:
Revenues	Year: 2014-15	Year: 2015-16	Year: 2016-17
Revenue Limit Sources	296,424,547	320,353,238	334,128,152
Federal Revenue	49,172,552	49,172,552	49,172,552
Other State Revenue	49,067,576	53,114,176	46,744,666
Local Revenue	49,166,023	58,066,023	54,955,190
Total Revenue	443,830,698	480,705,989	485,000,559
Expenditures			
Certificated Salaries	167,806,652	174,328,426	182,576,029
Step & Column Adjustment		2,464,514	2,476,445
Cost-of-Living Adjustment			
Other Adjustments		518,171	(2,596,224)
Classified Salaries	65,361,840	65,361,840	66,670,851
Step & Column Adjustment		980,428	1,000,062
Cost-of-Living Adjustment			
Other Adjustments		328,583	(1,667,125)
Employee Benefits	97,563,361	106,296,133	114,149,466
Books & Supplies	39,283,016	46,268,830	43,460,810
Services, Other Operating Exp	74,473,111	76,139,052	72,282,442
Capital Outlay	855,925	819,097	796,633
Other Outgo	7,098,953	6,977,046	6,977,046
Direct Support/Indirect Costs	(1,728,064)	(1,728,064)	(1,728,064)
Total Expenditures	450,714,794	478,754,056	484,398,371
Operating Surplus (Deficit)	(6,884,096)	1,951,933	602,188
Other Financing Sources & Transfers In(Positive figure)	734,067	734,067	734,067
Other Financing Uses & Transfers Out (Neg Figure)	(725,000)	(725,000)	(725,000)
Current Yr Inc(Dec) in Fund Balance	(6,875,029)	1,961,000	611,255
Beginning Fund Balance	25,533,200	22,748,657	36,409,804
Audit Adjustments/Restatements			
Ending Balance	18,658,171	24,709,657	37,021,059
Restricted Balance			
Required Reserve	8,946,986	9,355,578	9,345,601
Unrestricted Balance (Incl Revolving)			
Comments (Major changes):			

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

J. Salary Notification Requirement

The following section is applicable and should be completed when any Salary/Benefit Negotiations are settled after the district's final budget has been adopted. N/A

Comparison of Proposed Agreement to Change in District Base Revenue Limit

(a) Current Year Base Revenue Limit (BRL) per ADA: (obtain from the FY _____ County Office-provided Revenue Limit or+B263 Form RL, Line 3	\$ - (Estimated)
(b) Prior Year Base Revenue Limit per ADA: (Form RL, Line 1)	\$ - (Actual)
(c) Amount of Current Year Increase: (a) minus (b)	\$ -
(d) Percentage Increase in BRL per ADA: (c) divided by (b)	0.00%
(e) Indicate Total Settlement Percentage Increase from Section A, line 5, Page 1 for current year	2.51%

K. Certification

The disclosure document must be signed by the district Superintendent or designee at the time of public disclosure and by the President or Clerk of the Governing Board at the time of formal board action on the proposed agreement.

The information provided in this document summarizes the financial implications of the proposed agreement and is submitted to the Governing Board for public disclosure of the major provisions of the agreement (as provided in the "Public Disclosure of Proposed Collective Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code 3547.5.



 District Superintendent (or Designee)
 (Signature)

5/29/15

 Date

After public disclosure of the major provisions contained in this summary, the Governing Board, at its meeting on _____, took action to approve the proposed Agreement with the _____ Bargaining Unit.

 President (or Clerk), Governing Board
 (Signature)

 Date

Special Note: The Alameda County Office of Education reserves the right to ask any additional questions or request any additional information we feel is necessary to review the district properly under AB 1200, including a copy of the Tentative Agreement.

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of Bargaining Units: OEA Certificated X Classified

FUND 11

The proposed agreement covers the period beginning 07/01/2014 and ending 06/30/2017

and will be acted on by the Governing Board at its meeting on 06/10/15 (Date).

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action.

A. Proposed Change in Compensation

Compensation		Annual Cost Prior to Proposed Agreement FY 2014-2015	Fiscal Impact of Proposed Agreement		
			Year 1	Year 2	Year 3
			Increase/(Decrease) FY 2014-2015	Increase/(Decrease) FY 2015-2016	Increase/(Decrease) FY 2016-2017
1.	Salary Schedule (This is to include Step & Column, which is also reported separately in item 6)	\$ 692,964	\$ 17,393	\$ 32,357	\$ 25,959
			2.51%	4.67%	3.75%
2.	Other Compensation Stipends, Bonuses, Longevity, Overtime Differential, Callback or Standby Pay, etc.		\$ -	\$ -	\$ -
			0.00%	0.00%	0.00%
2a.	Description of Other Compensation			\$ -	\$ -
3.	Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.	\$ 115,592	\$ 2,901	\$ 5,397	\$ 4,330
			2.51%	4.67%	3.75%
4.	Health/Welfare Plans	\$ -	\$ -	\$ -	\$ -
			0.00%	0.00%	0.00%
5.	Total Compensation - Add Items 1 through 4 to equal 5	\$ 808,556	\$ 20,294	\$ 37,754	\$ 30,289
			2.51%	4.67%	3.75%
6.	Step & Column - Due to movement plus any changes due to settlement. This is a subset of item No. 1.	\$ -	\$ -	\$ -	\$ -
7.	Total number of represented Employees (Use FTEs)	10	10	10	10
8.	Total Compensation Average Cost per Employee	\$ 80,856	\$ 2,029	\$ 3,775	\$ 3,029
			0.00%	0.00%	0.00%

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

9. What was the negotiated percentage increase approved? For example, if the increase in "Year 1" was for less than a full year, what is the annualized percentage of that increase for "Year 1"?

For FY 2014-15, all schedules, substitute rates, and adult education hourly rates shall be increased as follows:

2% effective 7/1/2014; 1.0 % effective 2/1/2015; and 2.5 % effective 6/30/2015. The annualized percentage for 2014-15 is 3.01%. To the extent the district receives more 2014-15 resources from the state than projected in third interim (\$296,316,598), 33% will be paid to unit members as a one-time payment by October 31, 2015.

For FY 2015-2016, all rates and schedules shall be increased by 2.5% effective 1/1/2016. This compensation is tied to preparation for the implementation of a 30 minute extension of additional collaboration time for one minimum day per week beginning 2016-17. Additional increases are dependent on additional funds from the State, according to a formula. For unrestricted funds received by the district in excess of the projected 2015-16 on-going revenues of \$320,370,623, 39% shall be used to provide a salary schedule increase to unit members, with 90% effective July 1, 2015, the remainder effective January 1, 2016. In addition, 39% of any one-time unrestricted revenues will be paid to unit members as a one-time payment by October 21, 2016.

For FY 2016-2017, the on-going increase to OEA Members is fully contingent on the additional revenues the District receives in 2016-17. The increase is calculated as the difference between LCFF funding for 2015-16 compared to 2016-17, using the FCMAT calculator as of May 1, 2016. For purposes of this analysis, we have assumed an increase of \$13.84 million, which is the difference between the LCFF funding amount for 2015-16 and 2016-17, calculated using the FCMAT calculator as of May 1, 2015. The increase is then allocated to unit members by formula: 30% of the first \$5 million, 42% of the next \$4 million, 48% of the next % million, and 39% of any remaining amount.

10. Were any additional steps, columns or ranges added to the schedules? (If yes, please explain.)

No

11. Please Include comments and explanations as necessary. (If more room is necessary, please attach additional sheet.)

N/A

- B. Proposed Negotiated Changes in Non-compensation Items** (e.g. class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

Class sizes for TK-3 are limited to 24:1 average per school - this was already incorporated into the 2015-16 budget.

Counselor ratios are reduced to 600:1 for grades 6-12 (currently at 700:1 for 7-12) - already in 2015-16 budget.

Addition of dental and vision benefits for STIP substitutes (minimal financial impact)

Reimbursement of particular mandatory professional dues for SLPs.

- C. What are the Specific Impacts (Positive or Negative) on Instructional and Support Programs to Accommodate the Settlement?** Include the impact of changes such as staff reductions or increases, program reductions or increases, elimination or expansion of other services or programs (e.g. counselors, librarians, custodial staff, etc.).

Expect positive impact - increased prep time for teachers, lower staffing ratios. Lower staffing has already been incorporated into budget and hiring plans.

- D. What Contingency Language is Included in the Proposed Agreement (e.g. reopeners, etc.)?**

See description above (A9) for the compensation contingencies.

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

E. Will this Agreement Create, Increase, or Decrease Deficit Financing in the Current or Subsequent Year(s)?

"Deficit Financing" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

No

F. Identify Other Major Provisions that do not Directly Affect the District's Costs; such as Binding Arbitration, Grievances Procedures, etc.

N/A

G. Source of Funding for Proposed Agreement

1. Current Year

To the extent the increase cannot be absorbed by Fund 11, the General Fund will transfer unrestricted resources.

2. If this is a single year agreement, how will the ongoing cost of the proposed agreement be funded in subsequent years (i.e., what will allow the district to afford this contract)?

N.A.

3. If this is a multiyear agreement, what is the source of funding, including assumptions used, to fund these obligations in subsequent years? (Remember to include compounding effects in meeting obligations.)

The Adult Education Fund (Fund 11) will manage revenues and expenses in future years to support the increase on an ongoing basis.

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

E. Will this Agreement Create, Increase, or Decrease Deficit Financing in the Current or Subsequent Year(s)?

"Deficit Financing" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

No

F. Identify Other Major Provisions that do not Directly Affect the District's Costs; such as Binding Arbitration, Grievances Procedures, etc.

N/A

G. Source of Funding for Proposed Agreement

1. Current Year

The cost of the salary increase will be funded from unrestricted funds set-aside for this purpose.

2. If this is a single year agreement, how will the ongoing cost of the proposed agreement be funded in subsequent years (i.e., what will allow the district to afford this contract)?

N.A.

3. If this is a multiyear agreement, what is the source of funding, including assumptions used, to fund these obligations in subsequent years? (Remember to include compounding effects in meeting obligations.)

The Adult Education Fund (Fund 11) will manage revenues and expenses in future years to support the increase on an ongoing basis.

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

H. Impact of Proposed Agreement on Current Year Operating Budget (Ed. Code 42142)

	Column 1 Latest Board- Approved Budget Before Settlement As of: 3/11/2015	Column 2 Cost of Adjustments as a Result of Settlement	Column 3 Other Revisions Costs Increases (Decreases)	Column 4 Total New Budget (Col 1+2+3)
Revenues				
Revenue Limit Sources (8010-8099)	\$ 1,000,000	\$ -	\$ -	\$ 1,000,000
Remaining Revenues (8100-8799)	\$ 530,046	\$ -	\$ -	\$ 530,046
Total Revenues	\$ 1,530,046	\$ -	\$ -	\$ 1,530,046
Expenditures				
1000 Certificated Salaries	\$ 842,160	\$ 17,393	\$ -	\$ 859,553
2000 Classified Salaries	\$ 210,006		\$ -	\$ 210,006
3000 Employee Benefits	\$ 433,591	\$ 2,901	\$ -	\$ 436,492
4000 Books and Supplies	\$ 378,529	\$ -	\$ (20,294)	\$ 358,235
5000 Services and Operating Expenses	\$ 72,090	\$ -	\$ -	\$ 72,090
6000 Capital Outlay	\$ -	\$ -	\$ -	\$ -
7000 Other Outgo	\$ 64,441	\$ -	\$ -	\$ 64,441
Total Expenditures	\$ 2,000,817	\$ 20,294	\$ (20,294)	\$ 2,000,817
Operating Surplus (Deficit)	\$ (470,772)	\$ (20,294)	\$ 20,294	\$ (470,772)
Other Sources and Transfers In	\$ -	\$ -	\$ -	\$ -
Other Uses and Transfers Out	\$ -	\$ -	\$ -	\$ -
Current Year Increase (Decrease) In Fund Balance	\$ (470,772)	\$ (20,294)	\$ 20,294	\$ (470,772)
Beginning Balance	\$ 470,772			\$ 470,772
Current Year Ending Balance	\$ -	\$ (20,294)	\$ 20,294	\$ -
Components of Ending Balance				
Nonspendable and Restricted 9711-9740	\$ -	\$ -	\$ -	\$ -
Reserved for Economic Uncertainties 9789 (2%)	\$ -	NA	NA	\$ -
Committed and Assigned 9770-9780	\$ -	\$ -	\$ -	\$ -
Unassigned/Unappropriated 9790	\$ -			\$ -

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

If the total amount of the adjustment in Column 2 on page 4 does not agree with the amount of the Total Compensation Increase in Section A, line 5, page 1 (e.g. increase was partially budgeted), explain the variance below:

N.A.

Please include any additional comments and explanations of page 4 as necessary:

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

J. Salary Notification Requirement

The following section is applicable and should be completed when any Salary/Benefit Negotiations are settled after the district's final budget has been adopted.

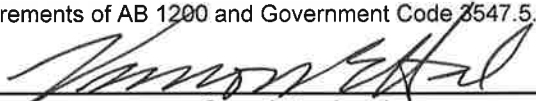
Comparison of Proposed Agreement to Change in District Base Revenue Limit

- | | | |
|---|----------|---------------|
| (a) Current Year Base Revenue Limit (BRL) per ADA:
(obtain from the FY _____ County Office-provided Revenue Limit or+B263
Form RL, Line 3 | \$ _____ | - (Estimated) |
| (b) Prior Year Base Revenue Limit per ADA:
(Form RL, Line 1) | \$ _____ | - (Actual) |
| (c) Amount of Current Year Increase: (a) minus (b) | \$ _____ | |
| (d) Percentage Increase in BRL per ADA: (c) divided by (b) | _____ | |
| (e) Indicate Total Settlement Percentage Increase from Section A,
line 5, Page 1 for current year | _____ | |

K. Certification

The disclosure document must be signed by the district Superintendent or designee at the time of public disclosure and by the President or Clerk of the Governing Board at the time of formal board action on the proposed agreement.

The information provided in this document summarizes the financial implications of the proposed agreement and is submitted to the Governing Board for public disclosure of the major provisions of the agreement (as provided in the "Public Disclosure of Proposed Collective Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code 3547.5.



District Superintendent (or Designee)
(Signature)

5/29/15
Date

After public disclosure of the major provisions contained in this summary, the Governing Board, at its meeting on _____, took action to approve the proposed Agreement with the _____ Bargaining Unit.

President (or Clerk), Governing Board
(Signature)

Date

Special Note: The Alameda County Office of Education reserves the right to ask any additional questions or request any additional information we feel is necessary to review the district properly under AB 1200, including a copy of the Tentative Agreement.

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

Name of Bargaining Units: OEA Certificated X Classified

FUND 12

The proposed agreement covers the period beginning 07/01/2014_____ and ending 06/30/2017_____

and will be acted on by the Governing Board at its meeting on _____06/10/15_____ (Date).

Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action.

A. Proposed Change in Compensation

Compensation		Annual Cost Prior to Proposed Agreement FY 2014-2015	Fiscal Impact of Proposed Agreement		
			Year 1 Increase/(Decrease) FY 2014-2015	Year 2 Increase/(Decrease) FY 2015-2016	Year 3 Increase/(Decrease) FY 2016-2017
1.	Salary Schedule (This is to include Step & Column, which is also reported separately in item 6)	\$ 3,212,060	\$ 80,623	\$ 149,985	\$ 120,714
			2.51%	4.67%	3.76%
2.	Other Compensation Stipends, Bonuses, Longevity, Overtime Differential, Callback or Standby Pay, etc.		\$ -	\$ -	\$ -
			0.00%	0.00%	0.00%
2a.	Description of Other Compensation			\$ -	\$ -
3.	Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.	\$ 535,799	\$ 13,449	\$ 25,019	\$ 20,136
			2.51%	4.67%	3.76%
4.	Health/Welfare Plans	\$ -	\$ -	\$ -	\$ -
			0.00%	0.00%	0.00%
5.	Total Compensation - Add Items 1 through 4 to equal 5	\$ 3,747,859	\$ 94,072	\$ 175,004	\$ 140,850
			2.51%	4.67%	3.76%
6.	Step & Column - Due to movement plus any changes due to settlement. This is a subset of item No. 1.	\$ -	\$ -	\$ -	\$ -
7.	Total number of represented Employees (Use FTEs)	59.25	59.25	59.25	59.25
8.	Total Compensation <u>Average</u> Cost per Employee	\$ 63,255	\$ 1,588	\$ 2,954	\$ 2,377
			0.00%	0.00%	0.00%

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

9. What was the negotiated percentage increase approved? For example, if the increase in "Year 1" was for less than a full year, what is the annualized percentage of that increase for "Year 1"?

For FY 2014-15, all schedules, substitute rates, and adult education hourly rates shall be increased as follows:

2% effective 7/1/2014; 1.0 % effective 2/1/2015; and 2.5 % effective 6/30/2015. The annualized percentage for 2014-15 is 3.01%. To the extent the district receives more 2014-15 resources from the state than projected in third interim (\$296,316,598), 33% will be paid to unit members as a one-time payment by October 31, 2015.

For FY 2015-2016, all rates and schedules shall be increased by 2.5% effective 1/1/2016. This compensation is tied to preparation for the implementation of a 30 minute extension of additional collaboration time for one minimum day per week beginning 2016-17. Additional increases are dependent on additional funds from the State, according to a formula. For unrestricted funds received by the district in excess of the projected 2015-16 on-going revenues of \$320,370,623, 39% shall be used to provide a salary schedule increase to unit members, with 90% effective July 1, 2015, the remainder effective January 1, 2016. In addition, 39% of any one-time unrestricted revenues will be paid to unit members as a one-time payment by October 21, 2016.

For FY 2016-2017, the on-going increase to OEA Members is fully contingent on the additional revenues the District receives in 2016-17. The increase is calculated as the difference between LCFF funding for 2015-16 compared to 2016-17, using the FCMAT calculator as of May 1, 2016. For purposes of this analysis, we have assumed an increase of \$13.84 million, which is the difference between the LCFF funding amount for 2015-16 and 2016-17, calculated using the FCMAT calculator as of May 1, 2015. The increase is then allocated to unit members by formula: 30% of the first \$5 million, 42% of the next \$4 million, 48% of the next % million, and 39% of any remaining amount.

10. Were any additional steps, columns or ranges added to the schedules? (If yes, please explain.)

No

11. Please Include comments and explanations as necessary. (If more room is necessary, please attach additional sheet.)

N/A

- B. Proposed Negotiated Changes in Non-compensation Items** (e.g. class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

Class sizes for TK-3 are limited to 24:1 average per school - this was already incorporated into the 2015-16 budget.

Counselor ratios are reduced to 600:1 for grades 6-12 (currently at 700:1 for 7-12) - already in 2015-16 budget.

Addition of dental and vision benefits for STIP substitutes (minimal financial impact)

Reimbursement of particular mandatory professional dues for SLPs.

- C. What are the Specific Impacts (Positive or Negative) on Instructional and Support Programs to Accommodate the Settlement?** Include the impact of changes such as staff reductions or increases, program reductions or increases, elimination or expansion of other services or programs (e.g. counselors, librarians, custodial staff, etc.).

Expect positive impact - increased prep time for teachers, lower staffing ratios. Lower staffing has already been incorporated into budget and hiring plans.

- D. What Contingency Language is Included in the Proposed Agreement (e.g. reopeners, etc.)?**

See description above (A9) for the compensation contingencies.

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

E. Will this Agreement Create, Increase, or Decrease Deficit Financing in the Current or Subsequent Year(s)?

"Deficit Financing" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

No

F. Identify Other Major Provisions that do not Directly Affect the District's Costs; such as Binding Arbitration, Grievances Procedures, etc.

N/A

G. Source of Funding for Proposed Agreement

1. Current Year

To the extent the increase cannot be absorbed by Fund 12, the General Fund will transfer unrestricted resources.

2. If this is a single year agreement, how will the ongoing cost of the proposed agreement be funded in subsequent years (i.e., what will allow the district to afford this contract)?

N.A.

3. If this is a multiyear agreement, what is the source of funding, including assumptions used, to fund these obligations in subsequent years? (Remember to include compounding effects in meeting obligations.)

The Child Development Fund (Fund 12) will manage revenues and expenses in future years to support the increase on an ongoing basis.

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

H. Impact of Proposed Agreement on Current Year Operating Budget (Ed. Code 42142)

	Column 1 Latest Board- Approved Budget Before Settlement As of: 3/11/2015	Column 2 Cost of Adjustments as a Result of Settlement	Column 3 Other Revisions Costs Increases (Decreases)	Column 4 Total New Budget (Col 1+2+3)
Revenues				
Revenue Limit Sources (8010-8099)	\$ -	\$ -	\$ -	\$ -
Remaining Revenues (8100-8799)	\$ 13,225,883	\$ -	\$ -	\$ 13,225,883
Total Revenues	\$ 13,225,883	\$ -	\$ -	\$ 13,225,883
Expenditures				
1000 Certificated Salaries	\$ 3,584,425	\$ 80,623	\$ -	\$ 3,665,048
2000 Classified Salaries	\$ 2,925,829		\$ -	\$ 2,925,829
3000 Employee Benefits	\$ 3,727,899	\$ 13,449	\$ -	\$ 3,741,348
4000 Books and Supplies	\$ 669,627	\$ -	\$ -	\$ 669,627
5000 Services and Operating Expenses	\$ 1,889,041	\$ -	\$ (94,072)	\$ 1,794,969
6000 Capital Outlay	\$ -	\$ -	\$ -	\$ -
7000 Other Outgo	\$ 698,561	\$ -	\$ -	\$ 698,561
Total Expenditures	\$ 13,495,381	\$ 94,072	\$ (94,072)	\$ 13,495,381
Operating Surplus (Deficit)	\$ (269,498)	\$ (94,072)	\$ 94,072	\$ (269,498)
Other Sources and Transfers In	\$ 325,000	\$ -	\$ -	\$ 325,000
Other Uses and Transfers Out	\$ (57,224)	\$ -	\$ -	\$ (57,224)
Current Year Increase (Decrease) In Fund Balance	\$ (1,722)	\$ (94,072)	\$ 94,072	\$ (1,722)
Beginning Balance	\$ 1,722			\$ 1,722
Current Year Ending Balance	\$ 0	\$ (94,072)	\$ 94,072	\$ 0
Components of Ending Balance				
Nonspendable and Restricted 9711-9740	\$ -	\$ -	\$ -	\$ -
Reserved for Economic Uncertainties 9789 (2%)	\$ -	NA	NA	\$ -
Committed and Assigned 9770-9780	\$ -	\$ -	\$ -	\$ -
Unassigned/Unappropriated 9790	\$ 0			\$ 0

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5

J. Salary Notification Requirement

The following section is applicable and should be completed when any Salary/Benefit Negotiations are settled after the district's final budget has been adopted.

Comparison of Proposed Agreement to Change in District Base Revenue Limit

- | | | |
|--|----------|---------------|
| (a) Current Year Base Revenue Limit (BRL) per ADA:
(obtain from the FY _____ County Office-provided Revenue Limit or +B263
Form RL, Line 3 | \$ _____ | - (Estimated) |
| (b) Prior Year Base Revenue Limit per ADA:
(Form RL, Line 1) | \$ _____ | - (Actual) |
| (c) Amount of Current Year Increase: (a) minus (b) | \$ _____ | |
| (d) Percentage Increase in BRL per ADA: (c) divided by (b) | _____ | |
| (e) Indicate Total Settlement Percentage Increase from Section A,
line 5, Page 1 for current year | _____ | |

K. Certification

The disclosure document must be signed by the district Superintendent or designee at the time of public disclosure and by the President or Clerk of the Governing Board at the time of formal board action on the proposed agreement.

The information provided in this document summarizes the financial implications of the proposed agreement and is submitted to the Governing Board for public disclosure of the major provisions of the agreement (as provided in the "Public Disclosure of Proposed Collective Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code 3547.5.



District Superintendent (or Designee)
(Signature)

5/29/15

Date

After public disclosure of the major provisions contained in this summary, the Governing Board, at its meeting on _____, took action to approve the proposed Agreement with the _____ Bargaining Unit.

President (or Clerk), Governing Board
(Signature)

Date

Special Note: The Alameda County Office of Education reserves the right to ask any additional questions or request any additional information we feel is necessary to review the district properly under AB 1200, including a copy of the Tentative Agreement.



Alameda County Office of Education

L. Karen Monroe
Superintendent

November 2, 2015

OAKLAND U.S.D.
BOARD OF EDUCATION

2015 NOV 12 P 2:34

BOARD OF EDUCATION

Joaquin Rivera
Trustee Area 1

Marlon L. McWilson
Trustee Area 2

Ken Berrick
Trustee Area 3

Aisha Knowles
Trustee Area 4

Fred Sims
Trustee Area 5

Eileen McDonald
Trustee Area 6

Yvonne Cerrato
Trustee Area 7

James Harris, President
Board of Education
Oakland Unified School District
1000 Broadway, Suite 680
Oakland, CA 94607-4099

RE: Public Disclosure of Collective Bargaining Agreement between the Oakland
Unified School District and the Oakland Education Association (OEA)

Dear President Harris:

We have reviewed the Public Disclosure of Collective Bargaining Agreement for the OEA bargaining unit submitted by the District on October 30, 2015. The agreement is an addendum to OEA agreement dated May 13, 2015 (i.e., the original agreement). The purpose of our review is to determine whether the addendum to the original agreement will have a material impact on the financial condition of the District in the current and subsequent two fiscal years.

The addendum applies a 5.596% increase to the rates and stipends in Appendix 2 of the original agreement. The District affirms that the cost associated with the addendum was previously included in the cost estimates submitted with the original agreement; therefore no additional cost will be incurred by the adoption of the addendum.

Based on the 2015-16 Adopted Budget Report Multi-Year Projection, it appears that the District will continue to be able to maintain its required reserve for economic uncertainties for the current and subsequent two fiscal years.

Should any other tentative agreements be made, please submit new Public Disclosure documents to our office 10 days prior to the date the Governing Board will take action.

If you have any questions or concerns regarding our review, please feel free to call me at (510) 670-4277.

Sincerely,

Jeffrey B. Potter, Executive Director
Alameda County Office of Education

313 W. Winton Ave.
Hayward, California
94544-1136

(510) 887-0152

www.acoe.org

JBP:sm

cc: Board of Education, Oakland USD
Antwan Wilson, Superintendent, Oakland USD
Vernon Hal, Senior Business Officer, Oakland USD
Ruth Alahydoian, Chief Financial Officer, Oakland USD
Carlene Naylor, State Trustee, Oakland USD
Tom Torlakson, State Superintendent of Public Instruction, CDE
Carolyn Baez, Financial Audits Bureau-Division of Audits, SCO
Peter Foggiato, School Fiscal Services Director, CDE
L. Karen Monroe, Superintendent, ACOE
Gary Jones, Associate Superintendent, ACOE