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**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

BOARD OF EDUCATION 2024

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Legislative File No. 24-0456

Introduction Date: February 28, 2024

Enactment No.:

Enactment Date:

Board Cover Memorandum

To: Board of Education

From: Sam Davis, Board Director

Meeting Date: February 28, 2024

Subject: Proposed Amendment to BP 3150: Results-Based Budgeting

Background:

In past years, it has sometimes happened that staff bring budget adjustments to the Board for our discussion and approval in February. However, given the statutory requirements for any required Reduction in Force notices, or notices of changes in funding source for certain positions, that are statutorily required by March 15, this can put the Board in a difficult position of not having time to ask for staff to return with more information or revisions to the adjustments before taking a vote. It is worth noting that AB 438 has shifted the timeline back for many notices to March 15, increasing the time pressure on the Board to make decisions on budget adjustments by the end of February at the latest for staff to be able to implement in a timely manner.

Of course, staff does not seek to put the Board in this position, and often there are very good reasons that staff have been delayed in bringing the adjustments to Board. However, these delays can lead to poor process or rushed decisions. We are fortunate that this year, staff provided the recommended adjustments to Board in January with plenty of time for community engagement, Board discussion and deliberation with two study sessions in January, a first read on February 14 and the final vote tonight.

Purpose:

I appreciate staff's foresight in planning budget adjustments with enough of a head start to be able to bring them to Board for discussion at our two January study sessions. It is in the spirit of setting this year's budget development calendar as an example of a best practice and a standard to be followed for future years, that I bring this proposed amendment for the Board's consideration.

The proposed additional language is in item 6 (in green text) below.

The only other change in this revision is to correct the language regarding safety services to schools, in alignment with the 2020 George Floyd Resolution.

I will be referring this revision to the Budget & Finance Committee as I understand that there are additional revisions that staff will be recommending to this policy, and it has been clear from our study session discussions that other Board members also want to revisit this policy in a more substantive way.

I would request the Committee to have a thorough discussion of BP 3150 over the coming months, leading to more significant revisions than what I am suggesting here, with the goal of making a recommendation to the Board for passage of a fully revised version, for our consideration and decision this summer or fall.

Fiscal Impact:

To be determined

Attachment - Amendment, Board Policy 3150 – Business and Noninstructional Operations – Results-Based Budgeting (Proposed)

OAKLAND UNIFIED SCHOOL DISTRICT

Board Policy

Business and Noninstructional Operations

BP 3150

Results-Based Budgeting

The Board Policy on Results-Based Budgeting provides policy direction to the Superintendent regarding the Oakland Unified School District's continuous budget development process. The Board Policy on Results-Based Budgeting is directly aligned to and builds upon Board of Education policies on School Governance and Quality School Development.

The Board of Education hereby establishes the following principles to guide the Oakland Unified School District's annual budgeting process:

1. The allocation and expenditure of OUSD financial resources shall be aligned to the achievement of continuous improvement in school quality and student outcomes.
2. The allocation of OUSD financial resources to schools shall be maximized.
3. The distribution of OUSD financial resources to schools shall account for varying student needs and neighborhood conditions.
4. School governance teams shall be empowered to budget and expend OUSD financial resources.
5. The general public shall have timely access to accurate, comprehensive, and easily comprehensible OUSD financial management information at the school, department, and district-wide levels.

Within the context of established OUSD strategic priorities, state and federal regulations, and collective bargaining agreements, the Board of Education hereby establishes its intent to:

1. Adopt three-year district-wide School Quality Improvement goals, benchmarks, and priorities (i.e. Balanced Scorecard, Local Control Accountability Plan) toward which every school and every central administration department is responsible for achieving steady measurable progress.
2. Hold every school responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that enables each school to realize steady measurable progress toward achieving Board-adopted School Quality Improvement goals and growth targets.
3. Hold every central administration department responsible and accountable, through the OUSD Community School Strategic Site Plan process, for budgeting and expending its financial resources in a manner that demonstrates how each department is achieving steady measurable progress toward providing the supports each school needs to achieve their School Quality Improvement goals and growth targets.
4. Maximize the allocation of all Unrestricted General Fund revenue (i.e. Local Control Funding Formula – Base, Supplemental, Concentration, and local tax revenue) to schools by:

- a. First, paying all legally required district-wide obligations (e.g. State Emergency Loan, charter school pass-through payments, audit findings).
 - b. Second, allocating up to 12% of all Unrestricted General Fund revenue to support district-wide central administrative services (e.g. finance, human resources, performance management, instructional services, legal services, district leadership).
 - c. Third, paying the following services to schools:
 1. Special Education
 2. Custodial and Buildings & Grounds
 3. ~~School Police & School Security Officers~~ School-site Culture Keepers and Central Culture & Climate Ambassadors
 4. School Nurses
 5. School Counselors
 6. Specified Enrichment Resources (i.e. summer school, music, art)
5. Allocate to schools all remaining Unrestricted General Fund revenue based on the projected student enrollment of each school, including allocating a differential amount of revenue to schools based on the number of students enrolled at each school who:
- a. Are in elementary schools, middle schools, and high schools
 - b. Qualify for the Federal Free & Reduced Price Meals Program
 - c. Are English Learners
 - d. Are in Foster Care
 - e. Reside in high-stress neighborhoods
6. The superintendent shall provide an itemized list of specific proposed budget adjustments to the Board and community of Oakland each year, including a list of impacted job positions, at a Board meeting no later than the second regular Board meeting in January.

The Superintendent shall provide the first draft of the District's annual budget and the Local Control Accountability Plan to the Board and community of Oakland each year at a Board meeting no later than the second regular Board meeting in May.