

Board Office Use: <b>Legislative File Info.</b>	
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Introduction Date	3/27/24
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# Board Cover Memorandum

**SECOND READING; ADOPTION**

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent  
Sondra Aguilera, Chief Academic Officer  
Monica Thomas, Deputy Chief of Continuous School Improvement

**Meeting Date** March 27, 2024 - Postponed; June 5, 2024

**Subject** AB 1912 Equity Impact Analysis Metrics Consistent with Education Code 41329

**Board Action** Develop AB 1912 Equity Impact Analysis Metrics Consistent with Education Code 41329 through the adoption of Board Resolution No. 2324-0020.

The purpose of the presentation is to recommend the metrics for the Equity Impact Analysis according to Assembly Bill 1912 (an act to add and repeal Section 41329 of the Education Code).

**Background** On October 25, 2023, the Board of Education directed OUSD staff to investigate the implementation of a revised list of Budget Development Options, Increases, and Reductions for the 2024-25 Budget Development process. One such Budget Development Option is listed on Attachment B - 2024-25 Budget Development List of Budget Adjustments, row, 3: Amendment, Potential Merger of District Schools.

If the Board seeks to implement school mergers, the process described in Assembly Bill 1912 must be started. On January 10, 2024 the board initiated the process directed by Assembly Bill 1912 to ensure that an Equity Impact Analysis is conducted on any schools recommended for closure or merger. Since January 10, 2024 staff and Board members have solicited community input on proposed metrics for the Equity Impact Analysis.

**Discussion** The first step within the AB 1912 process is to confirm the metrics that will be used to conduct the required Equity Impact Analysis on the schools recommended for closure or merger. The metrics recommended to the Board are the metrics required in the AB 1912 legislation, a-i, plus the addition of four metrics collected in OUSD. The table below provides the recommended metrics for the Equity Impact Analysis:

Policy	Description	Metric
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AB 1912 (a)	The condition of a school facility.	Facility Condition Index
AB 1912 (b)	The operating cost of a school and the associated savings resulting from a closure or consolidation.	Impact- Savings if school is closed.
AB 1912 (c)	The capacity of a school to accommodate excess pupils.	Underutilized Classrooms
AB 1912 (d)	Special programs available at the schools being considered for closure or consolidation and whether those programs will be provided at the same current level at the schools to which pupils will be diverted.	<ul style="list-style-type: none"> <li>● Dual Language</li> <li>● Special Education, self contained</li> </ul>
AB 1912 (e)	Environmental factors, including, but not limited to, traffic and proximity to freeway access.	CALENVIRONS Pollution Burden Index
AB 1912 (f)	Balance of pupil demographics, including race or ethnicity, pupils with disabilities, English learners, foster youth, and homeless youth, in the schools being considered for closure or consolidation, and the resulting demographic balance of pupils after placement in other schools, in order to determine if the decision to close or consolidate will have a disproportionate impact on any particular demographic group.	School Snapshot of enrollment demographics
AB 1912 (g)	Transportation needs of pupils.	<ul style="list-style-type: none"> <li>● Impact- provided when a list of</li> </ul>

		<p>schools are selected.</p> <ul style="list-style-type: none"> <li>Context: Enrollment Choice</li> </ul>
AB 1912 (h)	Aesthetics and the opportunity for blight and negative impact on the surrounding community.	Impact- provided when a list of schools are selected.
AB 1912 (i)	Impact on feeder school attendance patterns with the closure of any particular school and whether the closure will attenuate attendance at other schools or specialized programs as a result.	Impact- provided when a list of schools are selected.
OUSD	School snapshot of total Enrollment	Enrollment: total number of currently enrolled students
OUSD	The rate of enrolled students that live in the neighborhood attendance area of the school.	<p>Live/Go</p> <ul style="list-style-type: none"> <li>-percent of school-age neighborhood residents who attend the school</li> <li>-percent of enrolled students who live in neighborhood</li> <li>-Projected neighborhood birth rates</li> </ul>
OUSD	The number of 1st-choice applications divided by the number of students the school can support at full capacity.	Demand Rate by school
OUSD	Sustainable School size to implement a Community Schools model for each grade	Sustainable School Size - School enrollment compared to the

	span.	required enrollment for a sustainable community school
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AB 1912 requires the Board of Education to first make the proposed metrics public so that community members can provide input to help guide the design of the state-mandated Equity Impact Analysis. This action happened on January 10, 2024 at a regularly scheduled Board meeting.

In order to solicit community input on the metrics, four Town Halls were conducted by Board Members in February:

- Feb. 1: Dir. Davis & Dir. Hutchinson
- Feb. 6: Dir. Thompson
- Feb. 7: Dir. Bachelor & Dir. Brouhard
- Feb. 13: Dir. Lerma

At the Town Hall meetings, a survey was distributed to participants to solicit their written feedback, in addition to the questions and comments shared in the meetings. OUSD staff continued to distribute the survey to staff and families until March 20, 2024. At the request of Board Members, staff created and shared a short video explaining the metrics and the Equity Impact Analysis, to accompany the distribution of the survey.

At the close of the survey on March 20, 2024, 173 community members had responded to the survey. Below are the school affiliations of the survey respondents:

District	Schools / Numbers of participants by school	Total respondents by district
District 1: Sam Davis	Chabot Middle School:2 Claremont Middle School: 5 Emerson: 2 Oakland Tech: 3 Piedmont Avenue Elementary: 2	14
District 2: Jennifer Brouhard	Bella Vista: 2 Cleveland Elementary: 4 Crocker Highlands: 1 Dewey: 1	18

	Franklin Elementary: 1 Lincoln Elementary: 1 Oakland High: 6 Roosevelt Middle School: 1 District 2 (unknown school): 1	
District 3: VanCedric Williams	Hoover and West Oakland Middle School: 2 MLK Elementary: 2 McClymonds High: 2	6
District 4: Mike Hutchinson	Bret Harte: 3 Edna Brewer: 2 Glenview Elementary: 2 Hillcrest: 11 Joaquin Miller Elementary: 3 Montclair Elementary: 2 Redwood Heights Elementary: 1 Kaiser: 1	25
District 5: Jorge Lerma	Horace Mann and United for Success: 2 Manzanita SEED: 1 Urban Promise Academy: 1 Think College Now: 1	5
District 6: Valarie Bachelor	Burckhalter Elementary: 1 Lockwood STEAM Academy: 1 Melrose Leadership Academy: 6 Skyline: 6 CCPA: 2 Oakland Academy of Knowledge: 1	17
District 7: Clifford Thompson	Grass Valley: 1 MPA: 1	2
Unknown district /	Unknown: 61	80

community organization Charter	Community Member: 6 Alumni: 3 Staff: 4 Retired Staff: 3 Charter school: 2	
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The first survey question reads: Please share any comments about the above nine metrics (A-I) required by the state (AB 1912).

The key themes in response to this question:

**Academic Impact and Criteria:**

- Lack of focus on academic performance and educational experience.
- Suggestions to include academic criteria such as student achievement in core subjects.

**Subjectivity, Trust, and Transparency:**

- Skepticism regarding the subjective nature of metrics and trust in fair evaluation.
- Concerns about bending metrics to support predetermined decisions and the need for transparency.

**Equity, Inclusivity, and Community Impact:**

- Calls for equity in examining demographic breakdowns and prioritizing schools with vulnerable populations.
- Importance of considering the strength of a school's community and identity in closure decisions.
- Concerns about negative impacts on vulnerable populations and inclusive decision-making processes.

**Financial Considerations and Savings:**

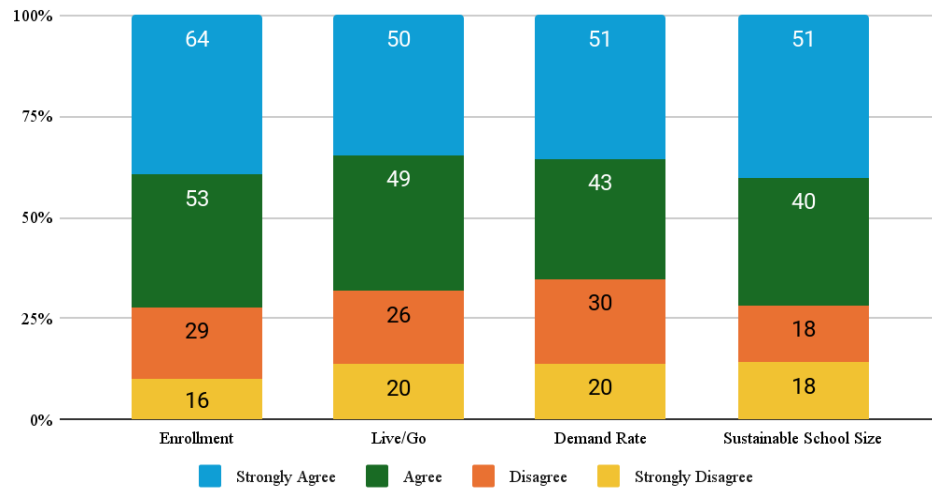
- Focus on operating costs, enrollment relative to capacity, and fiscal benefits of closure decisions.
- Questions about the district's ability to prove financial savings from school closures.

**Community Engagement, Communication, and Advocacy:**

- Importance of community engagement before closure decisions.
- Lack of feedback from students, families, community, and educators in decision-making.
- Advocacy for specific schools based on unique programs, community support, and contributions to vulnerable students' needs.
- Calls for transparency in how metrics are used and weighted, and concerns about inadequate community information.

The second survey question asks respondents to rate each of the four additional metrics proposed by OUSD staff, on a scale from “strongly agree” to “strongly

disagree.” Results for each of the four metrics are shown below.



The third survey question asks: Please share any comments about the above additional metrics suggested by OUSD.

Key themes in response to this question:

**Equity and Inclusion:**

- Concerns about potential reinforcement of disparities and issues related to racism and anti-Blackness.
- Emphasis on considering demographics, special programs, and equity in decision-making.
- Advocacy for prioritizing resource allocation based on equity and avoiding discrimination against certain schools or communities.

**Academic Performance and Quality:**

- Desire for explicit academic performance criteria and prioritization of academic outcomes.
- Suggestions that academic performance metrics could be used as proxies for school quality.
- Calls for investigating reasons behind declining enrollment and potential solutions for building up enrollment within a redesign process.

**Transparency and Communication:**

- Uncertainty about how metrics will be used and weighted in decision-making.
- Calls for more transparency, clear definitions of terms, and understanding of metric interpretations.
- Emphasis on the importance of transparent communication with stakeholders about the decision-making process.

**Community and Sustainability:**

- Recognition of the value of community schools but

- acknowledgment of resource requirements.
- Importance of considering sustainable school size and community impact within the broader district.
- Concerns about the terminology used, such as "closure schools," and its implications for community perception.

**Neighborhood Emphasis and Charter Schools:**

- Differing opinions on prioritizing neighborhood schools and concerns about hyper-segregation.
- Links between declining enrollment and the presence of charter schools, with suggestions to focus on charter schools in closure decisions.
- Challenges related to neighborhood emphasis and its potential impact on school closures and community ties.

The fourth survey question reads: Are there any other metrics you would propose for consideration for the equity impact analysis?

Additional suggested metrics include:

**Student Well-being and Access:**

- Student Mobility
- Transportation
- Environmental Factors
- Accessibility and Disability Accommodation
- Safety Metrics
- Proximity to Community Resources

**Community Impact and Engagement:**

- Community Impact
- Relationships and Reparation
- Community Engagement and Feedback
- Historical Context
- Redistribution of Resources

**Academic Performance and Quality:**

- Academic Performance Criteria
- School Quality and Academic Metrics
- Student Success Rates and Sub-Group Success
- Underperforming School Support
- Teacher Turnover and Stability

**Equity Focus and Inclusivity:**

- Equity Impact Analysis
- Charter School Impact
- Charter School Metrics
- Equity Focus
- Translation and Inclusivity

**Administrative Considerations and Metrics:**

- Additional Programming



- Redistributing Resources
- Consideration of Charter School Impact
- Transportation Nuances

Finally, respondents were asked for any additional comments. Themes in these comments:

**Consideration of Building Conditions and Location:**

- Emphasis on assessing buildings based on condition, size, and location as an alternate method for selecting schools for consolidation/closure.
- Discussion on the impact of building conditions, size, and location on the potential for consolidation/closure decisions.

**Equity, Community Engagement, and Transparency:**

- Importance of equity, transparency, and community engagement in the decision-making process.
- Recognition of past inequities and the need to interrupt patterns of discrimination.
- Calls for concrete plans and enhancements to minimize opposition and improve community support.

**Financial Considerations and Program Sustainability:**

- Discussions on financial considerations, including the impact on the district's budget and the sustainability of programs.
- Consideration of Measure Y projects and potential influences on school closures.

**Metric Interpretation and Student Outcomes:**

- Concerns about the interpretation of metrics and the potential impact on student outcomes.
- Questions about the effectiveness of school closures in improving student outcomes and budget management.

**Engagement and Impact on Specific Communities:**

- Community support and investment in specific schools, such as Horace Mann and Fremont HS.
- Calls for careful investigation into the impact of AB 1912 on specific communities, particularly low-income Latino students and families.

Based on the data collected here, particularly the quantitative analysis showing that a large majority of respondents support the inclusion of the four additional metrics, OUSD staff recommends that all thirteen metrics be included in the Equity Impact Analysis. If the Board decides to amend the recommended metrics, the rationale will be captured through the resolution amendment process conducted during the Board meeting.

The suggested timeline to continue implementation of the AB 1912 legislation is

the following:

- **March 27, 2024:** Second read and adoption of the metrics for conducting the Equity Impact Analysis.
- **August 28, 2024:** First read of the Equity Impact Analysis for the recommended school changes.
- **October 9, 2024:** 2nd read and adoption of the Equity Impact Analysis and the recommended school changes.
- **August 2024-November 2024:** Notification to families and support to identify new school for the 2025-2026 Enrollment Window.

**Fiscal Impact**

The projected amount for potential savings for implementing 10 school mergers as described in Attachment B is \$2,477,792.00.

**Attachment(s)**

- Presentation - AB 1912 Equity Impact Analysis Metrics Recommendation
- Resolution- No. 2324-0020 - Metrics for Initiation of School Changes Per Education Code 41329
- File #23-2308 - Resolution - 2024-25 Budget Balancing Options, Increases, and Reductions, Enactment #23-1808, Approved
- Assembly Bill 1912

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**RESOLUTION OF THE  
BOARD OF EDUCATION OF THE  
OAKLAND UNIFIED SCHOOL DISTRICT**

**Resolution No. 2324-0020A**

**Equity Impact Analysis Metrics  
for the Initiation of School Changes Per Education Code 41329**

**WHEREAS**, on March 9, 2023, the Board of Education adopted Resolution No. 2223-0040 Proposed Budget Adjustments for 2023-24 Budget, approving budget adjustments for the 2023-24 fiscal year and beyond;

**WHEREAS**, on February 28, 2024, the Board of Education adopted 2324-0137 - Proposed Budget Adjustments for Fiscal Year 2024-25 and Restructuring Recommendations for the 2025-26 fiscal year and beyond;

**WHEREAS**, one of the adopted budget adjustments was “the potential merger of schools effective 2024-25,” but that “[b]efore any closures or consolidations take place, the District will comply with the guidelines set forth in [Assembly Bill No.] 1912 which requires a district, before approving the closure or consolidation of a school, to conduct an equity impact analysis in its consideration of school closures or consolidations”;

**WHEREAS**, while the specific number or types of mergers was not specified in Resolution No. 2223-0040A, the potential merger of schools did involve shifting 17.70 Full-Time Equivalent positions from the General Fund (Fund 0000) to ESSER funding for 2024-25, for an estimated savings to the General Fund of \$2.48 million;

**WHEREAS**, Education Code section 41329, added by Assembly Bill No. 1912 (“AB 1912”), requires all school districts in financial distress (such as OUSD) to follow certain procedural steps prior to voting to “clos[e] or consolidat[e] . . . a school of the school district”;

**WHEREAS**, the first procedural step is for the “governing board of the school district [to] develop a set of metrics for the development of [an] equity impact analysis and make those metrics public at a regularly scheduled meeting of the governing board of the school district so that the public can provide input regarding the metrics being used to conduct the analysis”;

**WHEREAS**, the Board held a public meeting on January 10, 2024 to review the recommended AB 1912 equity impact analysis metrics, solicit community input and launch further engagement by means of Town Hall meetings and district-wide surveying on the recommended equity impact analysis metrics; and

**WHEREAS**, in addition to soliciting feedback in the public meeting held on January 10, 2024, staff and Board members have solicited community input on proposed metrics for the equity impact analysis through town hall meetings, surveys, and community engagement;

**NOW, THEREFORE, BE IT RESOLVED**, in light of Resolution No. 2223-0040A and Education Code section 41329, the Board hereby accepts the AB 1912 metrics as described by the legislation in 41329 (a)(1)(A) through (I).

**BE IT FURTHER RESOLVED**, the Board approves the addition of the following four (4) additional metrics: 1) the enrollment numbers of each school; 2) the live/go data; 3) the demand rate; and 4) the sustainable school size.

**BE IT FURTHER RESOLVED**, the Board directs staff to conduct the equity impact analysis using the approved metrics by the Fall 2024 and continue to follow the AB 1912 process as prescribed in the legislation.

**PASSED AND ADOPTED** by the Board of Education of the Oakland Unified School District this 5th day of June 5, 2024, by the following vote:

PREFERENTIAL AYE:

PREFERENTIAL NOE:

PREFERENTIAL ABSTENTION:

PREFERENTIAL RECUSE:

AYES:

NOES:

ABSTAINED:

RECUSED:

ABSENT:

**CERTIFICATION**

We hereby certify that the foregoing is a full, true and correct copy of a Resolution passed at the Meeting of the Board of Education of the Oakland Unified School District held on June 5, 2024.

<b>Legislative File</b>	
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By:	

**OAKLAND UNIFIED SCHOOL DISTRICT**

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Benjamin Sam Davis  
President, Board of Education

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Kyla Johnson-Trammell  
Superintendent and Secretary, Board of Education

**Attachment:**  
**Education Code Section 41329**

**State of California**

**EDUCATION CODE**

**Section 41329**

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41329. (a) A school district under financial distress, as defined in subdivision (b), shall do all of the following before approving the closure or consolidation of a school of the school district:

(1) In deciding what schools to close or consolidate, the governing board of the school district shall conduct an equity impact analysis in its consideration of school closures or consolidations. The governing board of the school district shall develop a set of metrics for the development of the equity impact analysis and make those metrics public at a regularly scheduled meeting of the governing board of the school district so that the public can provide input regarding the metrics being used to conduct the analysis. The metrics shall include, but are not limited to, all of the following:

(A) The condition of a school facility.

(B) The operating cost of a school and the associated savings resulting from a closure or consolidation.

(C) The capacity of a school to accommodate excess pupils.

(D) Special programs available at the schools being considered for closure or consolidation and whether those programs will be provided at the same current level at the schools to which pupils will be diverted.

(E) Environmental factors, including, but not limited to, traffic and proximity to freeway access.

(F) Balance of pupil demographics, including race or ethnicity, pupils with disabilities, English learners, foster youth, and homeless youth, in the schools being considered for closure or consolidation, and the resulting demographic balance of pupils after placement in other schools, in order to determine if the decision to close or consolidate will have a disproportionate impact on any particular demographic group.

(G) Transportation needs of pupils.

(H) Aesthetics and the opportunity for blight and negative impact on the surrounding community.

(I) Impact on feeder school attendance patterns with the closure of any particular school and whether the closure will attenuate attendance at other schools or specialized programs as a result.

(2) (A) The governing board of the school district shall provide its recommendations regarding school closures and consolidations to the public at a regularly scheduled meeting and share how it prepared its list and include, at a minimum, all of the following information:

(i) Factors used to identify the list of school closures or consolidations.

(ii) Equity impact analysis findings for each school closure or consolidation.  
(iii) Plan for the use of the schools proposed for closure or consolidation once it becomes a vacated facility.

(iv) Criteria used to assign displaced pupils to other schoolsites, or a description of the process of reassignment that will be used by the school district.

(v) Options and timeline for transitioning pupils to their new schools, including improving safe routes to schools and home-to-school transportation needs.

(B) The governing board of the school district shall review and consider the feedback presented at the public meeting and make its decision on any school closures or consolidations at a subsequently scheduled regular meeting.

(C) At the subsequent regularly scheduled meeting, the governing board of the school district shall present its final recommendation for school closures or consolidations, which shall include a review of how public input was incorporated into the final recommendation. Any affirmative action by the governing board of the school district to implement a school closure or consolidation shall be made only after it adopts a resolution concluding that the community engagement process required pursuant to this section has been completed.

(D) (i) Upon an affirmative action by the governing board of the school district to implement a school closure or consolidation, the school district shall provide information to parents and pupils in multiple formats, including, but not limited to, email and paper notifications.

(ii) Notifications to parents shall be translated into their primary language pursuant to Section 48985.

(iii) The information shall include all of the following:

(I) The date of the approved closure or consolidation.

(II) The pupil's new school assignment, as applicable.

(III) School district resources for pupils and parents to support the pupil's transition.

(IV) School district contacts for additional information.

(b) For purposes of this section, "financial distress" means a school district with an emergency apportionment pursuant to Article 2 (commencing with Section 41320) or this article, a trustee appointed pursuant to Article 2 (commencing with Section 41320), or an administrator appointed pursuant to this article.

(c) For purposes of this section, "governing board of a school district" includes a trustee appointed pursuant to Article 2 (commencing with Section 41320), or an administrator appointed pursuant to this article.

(d) This section does not apply to a school district's closure of a school due solely to the unsafe condition of the school's facilities.

(e) The process outlined pursuant to this section shall not take more than 12 months from the initiation of the equity impact analysis pursuant to paragraph (1) of subdivision (a) to the notification to parents of the final determination of the governing board of the school district pursuant to subparagraph (D) of paragraph (2) of subdivision (a).

(f) This section shall become inoperative on July 1, 2028, and, as of January 1, 2029, is repealed.

(Amended by Stats. 2023, Ch. 131, Sec. 28. (AB 1754) Effective January 1, 2024. Inoperative July 1, 2028, by its own provisions. Repealed as of January 1, 2029, by its own provisions.)





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# Board Cover Memorandum

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent  
Lisa Grant-Dawson, Chief Business Officer

**Meeting Date** October 25, 2023

**Subject** 2024-25 Budget Balancing Options, Increases, and Reductions – Second Read

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**Ask of the Board** It is recommended that the Governing Board adopt for Second Read and discuss the revised list of developing Budget Development Options, Increases, and Reduction for the 2024-25 Budget Development process.

**Background** On June 28, 2023, the same night the 2023-24 Budget was approved, staff recommended the approval of Board Agenda Item 23-1682 Tentative Agreement between the Oakland Education Association and the Oakland Unified School District for Successor Collective Bargaining Agreement effective November 1, 2022 through June 30, 2025. The adoption of this agreement is the primary driver to the 45+Day Revise, which was approved by the Board On September 28, 2023 and included the implementation of the OEA agreement and associated expense budget and projected spending adjustments.

The District’s AB1200 document that was submitted to the Alameda County Office of Education indicated that the District would need to make necessary reductions to continue to afford the agreement. It was also understood that the District intended to improve compensation for all of its labor groups; thus, further exacerbating the need to developing a sustainable budget that supported the salaries, benefits, and Health and Welfare increase of 25% for Kaiser in 2024-25 (which is applied to all Health plans) for projection purposes.

As a condition of the approval of the AB1200 and in light of appropriate financial management as the District continues to gain local control, the District staff ensured commitments in the 2024-25 Budget Development process to assure the Alameda County of Office of its commitment to ensure affordability for the OEA

agreement and to establish the expectation for forthcoming Tentative Agreements with other Labor Groups. A summary of the conditions are as follows:

- **Excerpt from OEA AB1200 Approval Letter**

*In order for ACOE to verify that Board and District staff are implementing the budget adjustments the Board approved within the Public Disclosure documents, OUSD will:*

- *Provide ACOE with a Board-approved detailed update on its **list of Budget Adjustments by October 31, 2023**;*
- *Share additional updates in ACOE's bi-weekly call to monitor the staff and Board's progress with strategic planning;*
- *Present a public update to be provided by First Interim, with further public disclosure and **formal Board Action required no later than February 2024**, to ensure the District meets its obligations in the subsequent fiscal year.*

The District is providing its preliminary list of budget balancing options, strategies, and areas of focus as it seeks to build a long term sustainable budget honoring its new and existing commitments. This list is provided as a first read and allows time for the Board, Staff, and community to embark on a journey of right sizing and analyzing our numerous investments, the impact, and developing recommendations for how to balance the District's financial commitments.

The District also hosted a Special Board Meeting on October 2, 2023, where the first of four Budget Workshop style sessions is intended to create a space for reimagining the District's operations within the funding perimeters we are projecting for not only 2024-25, but in a multi-year format for ongoing sustainability. The District plans to return for the second read on October 25, 2023 and provide a draft document for the Board to review in preparation for submission to the Alameda County Office of Education to verify progress and provide an update of our detailed list of Budget Adjustments. The projected estimates of Budget Reductions and investments will be completed as various levels of analysis are completed to provide the best estimate as well as align it to the projected deficits in the next iteration of the Multi-Year Projection included with or prior to First Interim (December 2023).

The work of the Budget Adjustments and list of areas to analyze and interrogate will be managed in conjunction with the District's update to its Fiscal Sustainability Plan. On October 11, 2023, the Board was presented with this item and the Fiscal Sustainability Plan for First Read. The District has received additions and comments to the list of Budget Adjustments which are marked with an asterisk next to the item number. These additions as well as the comments provided which will be analyzed and as with the previous items, a value of savings or investment will be added to a revised list that will be provided to the Board for review in conjunction with a revised target for cumulative reductions to address the multi-year projected deficits at First Interim.

Since the First Read, the District has also completed and provided an AB1200 for the Tentative Agreement for Buildings Construction Trades Council. The projected cost increases will be added to subsequent financial update, though included in the AB1200 is a projection of the current and multi-year impact. This item will be presented to the Board as its own agenda item at the October 25<sup>th</sup> or November 8, 2023 Agenda Board Meeting; however, should be noted as a pending item impacting the ongoing budget and follows the Districts intent and commitment to providing improvements in compensation for ALL employees.

**Recommendation** It is recommended that the Governing Board adopt for Second Read and discuss the revised list of developing Budget Development Options, Increases, and Reduction for the 2024-25 Budget Development process.

**Attachments**

- 23-2308 - Budget Development Options, Increases, and Reductions – First Read
- 23-2285 – October 2, 2023 Board Study Session Agenda
- 23-2285 Presentation
- 23-1669- 2023-24 Board Work Plan
- Attachment B- 2024-25 Revised Budget Development List of Budget Adjustments

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# Board Cover Memorandum

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent  
Lisa Grant-Dawson, Chief Business Officer

**Meeting Date** October 11, 2023

**Subject** 2024-25 Budget Balancing Options, Increases, and Reductions – First Read

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**Ask of the Board** It is recommended that the Governing Board receive for First Read and discuss the list of developing Budget Development Options, Increases, and Reduction for the 2024-25 Budget Development process.

**Background** On June 28, 2023, the same night the 2023-24 Budget was approved, staff recommended the approval of Board Agenda Item 23-1682 Tentative Agreement between the Oakland Education Association and the Oakland Unified School District for Successor Collective Bargaining Agreement effective November 1, 2022 through June 30, 2025. The adoption of this agreement is the primary driver to the 45+Day Revise, which was approved by the Board On September 28, 2023 and included the implementation of the OEA agreement and associated expense budget and projected spending adjustments.

The District’s AB1200 document that was submitted to the Alameda County Office of Education indicated that the District would need to make necessary reductions to continue to afford the agreement. It was also understood that the District intended to improve compensation for all of its labor groups; thus, further exacerbating the need to developing a sustainable budget that supported the salaries, benefits, and Health and Welfare increase of 25% for Kaiser in 2024-25 (which is applied to all Health plans) for projection purposes.

As a condition of the approval of the AB1200 and in light of appropriate financial management as the District continues to gain local control, the District staff ensured commitments in the 2024-25 Budget Development process to assure the Alameda County of Office of its commitment to ensure affordability for the OEA

agreement and to establish the expectation for forthcoming Tentative Agreements with other Labor Groups. A summary of the conditions are as follows:

- **Excerpt from OEA AB1200 Approval Letter**

*In order for ACOE to verify that Board and District staff are implementing the budget adjustments the Board approved within the Public Disclosure documents, OUSD will:*

- *Provide ACOE with a Board-approved detailed update on its **list of Budget Adjustments by October 31, 2023**;*
- *Share additional updates in ACOE's bi-weekly call to monitor the staff and Board's progress with strategic planning;*
- *Present a public update to be provided by First Interim, with further public disclosure and **formal Board Action required no later than February 2024**, to ensure the District meets its obligations in the subsequent fiscal year.*

The District is providing its preliminary list of budget balancing options, strategies, and areas of focus as it seeks to build a long term sustainable budget honoring its new and existing commitments. This list is provided as a first read and allows time for the Board, Staff, and community to embark on a journey of right sizing and analyzing our numerous investments, the impact, and developing recommendations for how to balance the District's financial commitments.

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The work of the Budget Adjustments and list of areas to analyze and interrogate will be managed in conjunction with the District's update to its Fiscal Sustainability Plan.

## **Recommendation**

It is recommended that the Governing Board receive for First Read and discuss the list of developing Budget Development Options, Increases, and Reduction for the 2024-25 Budget Development process.

**Attachments**

- 23-2285 – October 2, 2023 Board Study Session Agenda
- 23-2285 Presentation
- 23-1669-2023-24 Board Work Plan
- Attachment B-Budget Development List of Budget Adjustments

Board Office Use: <b>Legislative File Info.</b>	
File ID Number	23-2285
Introduction Date	10-2-2023
Enactment Number	
Enactment Date	



# Board Cover Memorandum

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent  
Dexter Moore, Jr., Chief of Staff  
Lisa Grant-Dawson, Chief Business Officer  
Jenine Lindsey, Interim General Counsel

**Meeting Date** October 2, 2023

**Subject** Board Study Session

**Ask of the Board** Receive and discuss the information presented

**Background** The purpose of the Board Study Session is to proactively come together as a community to prepare for the 2024-25 budget development process, and to support the Board’s review and communication regarding the budget development options that are coming in October. The meeting will include a presentation and an opportunity for participants to actively share their feedback. This will be the first of a series of Board Study Sessions throughout the year, with the outcomes for this session focused on:

- Provide a summary of the investments that the Board proposes to establish quality community schools
- Discuss the financial implications of increasing investments in school safety measures
- Revisit the cost of previous financial commitments to staff retention
- Describe the underlying factors that have led to the current financial strain in the District
- Discuss recommended budget adjustments to ensure fiscal solvency

**Attachment(s)**

- Presentation
- 2023-2024 Board Work Plan



OAKLAND UNIFIED SCHOOL DISTRICT

# Board Study Session

Budget Development Update:  
Financial Outlook and Continued Realignment  
Preparing for the List of Budget Options

October 2, 2023



OAKLAND UNIFIED  
SCHOOL DISTRICT

*Community Schools, Thriving Students*

## Our Vision

All 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.

## 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.



# Vision for Continuous School Improvement

Mission & Vision	Quality Program Implementation	Collective Leadership & Professional Learning
<ul style="list-style-type: none"><li>● Compelling and inspirational school vision and mission</li><li>● Strategically organize resources and team structures toward vision</li><li>● Implement policies, structures and practices</li></ul>	<ul style="list-style-type: none"><li>● Rigorous, standards-based instruction</li><li>● College, career and community ready</li><li>● Joyful, asset-based &amp; anti-racist mindset</li><li>● Culture of inclusive learning</li><li>● <i>Safe School Environments</i></li><li>● <i>Quality Facilities and Joyful Learning Environments</i></li></ul>	<ul style="list-style-type: none"><li>● Culture of shared responsibility</li><li>● Shared decision-making</li><li>● Meaningful partnerships with students and families</li></ul>



# Four Pillars of OUSD Safety

## Facilities

- Front door buzzer entry system
- Perimeter safety fencing and gates
- Visitor Management System
- Exterior Safety Signage
- Cameras Systems
- Cybersafety

## Prevention

- Universal (Tier 1) Culture Practices
- Positive student-adult relationships
- Clear & Proactive Communication
- Student Voice & Agency
- Intentional MTSS
- Social Emotional Learning
- Restorative Justice
- Safety Tip lines
- CBO Partnerships
- Trainings
- Cyberbullying

## Incident Response

- OUSD Intake Line
- Central Culture & Climate Ambassadors
- Mental health crisis support
- Trainings
- GFR Village Response Plans
- City & Community Partners
- Violence Prevention Education
- Health & Safety Protocols

## Emergency Preparedness

- Comprehensive safety plan
- Lockdown/Secure School protocols
- Emergency radios
- First aid kits
- Trainings
- Crisis alert systems
- Family communication
- Reunification & Rally Points
- Standard operating procedures



**Let's prepare for  
the journey.**

**What shall we pack  
and unpack?**

# Base and LCAP Investments

## Organizational Requirements

Required by Law

Required by Board Resolution

Required by Labor Contracts

## District Prioritized Commitments

Strategic Plan Initiatives

Board Priorities

Board Policies

Board Resolutions

## Sunsetting Priorities Investments

These investments and areas of focus cannot continue due to lack of prioritization, effectiveness, and/or funding has expired and is therefore not sustainable.

# First, we pack and **unpack** the Big Rocks!



Board  
Work  
Plan

Other  
Prioritized  
LCAP  
Investments

**Sunsetting  
ESSER  
Investments**

Board  
Resolutions

Labor  
Agreements

**The weight is heavy, so get ready!  
Let's carry it together.**






# 2023-24 Board Priorities

- Improved Academic Outcomes
- Continuous District & School Improvement
- Attendance & Enrollment
- Comprehensive Safety Plan

- Improved Board Governance
- Shared Governance
- LCAP Adoption & Strategic Plan Extension
- Fiscal Solvency



**Investments Identified in the LCAP**  
***Summary Data and additional considerations to***  
***Help Guide our Next Session Together***

# Existing LCAP Investments: Goal 1

Investment	23-24 Centrally-Directed S&C Cost	23-24 Total Cost Above Base
Academic Acceleration	\$9.1M	\$16.0M
Academics & Instruction	\$4.1M	\$9.2M
Physical Education	\$0.2M	\$0.4M
Visual & Performing Arts	\$0.2M	\$4.5M
Early Childhood Learning & Pre-Kindergarten Programs	\$0.1M	\$4.6M
Early Literacy Program	\$0.4M	\$6.6M
*Curriculum Implementation	\$10.2M	\$13.5M
Instructional Technology	\$3.7M	\$4.0M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)*

*Orange = Already identified as a Board Priority*

# Existing LCAP Investments: Goal 1 (continued)

Investment	23-24 LCFF Cost	23-24 Total Cost
Alternative Education	\$1.8M	\$2.1M
Building OUSD Middle Schools	\$0.2M	\$1.3M
Continuous School Improvement	\$9.9M	\$13.4M
Linked Learning	\$3.2M	\$12.0M
Multilingual Programs	\$0.1M	\$0.6M
Network-Based School Supports	\$2.5M	\$3.0M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)*

*Orange = Already identified as a Board Priority*

# Existing LCAP Investments: Goal 2

Investment	23-24 LCFF Cost	23-24 Total Cost
*Targeted Initiatives for Black/African American Students	\$2.1M	\$4.6M
Targeted Initiatives for Latino Students	\$0.1M	\$0.6M
Targeted Initiatives for Arab, Asian & Pacific Islander Students	\$0.2M	\$0.9M
Supports for Students with Disabilities	\$7.4M	\$8.6M
Supports for Unhoused Students & Families	\$0.3M	\$1.2M
Supports for Foster Youth	\$0.1M	\$0.6M
*English Language Development	\$10.5M	\$11.0M
*Supports for Newcomers	\$4.5M	\$6.7M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)*

*Orange = Already identified as a Board Priority*

# Existing LCAP Investments: Goal 2 (continued)

Investment	23-24 LCFF Cost	23-24 Total Cost
After School Programs	\$0	\$13.0M
*Summer & Saturday Learning Programs	\$0.3M	\$5.3M
*Research and Data Analysis	\$1.5M	\$1.6M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)  
Orange = Already identified as a Board Priority*

# Existing LCAP Investments: Goal 3

Investment	23-24 LCFF Cost	23-24 Total Cost
Behavioral & Mental Health	\$8.4M	\$8.5M
Community Schools	\$13.8M	\$34.8M
Restorative Practices/Peer Restorative Justice	\$0.4M	\$0.4M
Human Trafficking Prevention	\$0	\$0.2M
School Safety Teams	\$9.7M	\$11.4M
Supports for Justice-Involved Youth & Their Families	\$0.1M	\$0.2M
Attendance Supports	\$0.6M	\$0.7M
*Counseling and Equitable Master Scheduling	\$5.3M	\$5.6M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)*

*Orange = Already identified as a Board Priority*

# Existing LCAP Investments: Goal 3 (continued)

Investment	23-24 LCFF Cost	23-24 Total Cost
Social Emotional Learning (SEL)	\$1.2M	\$1.4M
Alcohol, Tobacco & Drug Intervention	\$0.1M	\$0.4M
*Health Services	\$1.4M	\$1.4M
Lesbian, Gay, Bisexual, Transgender & Queer/Questioning (LGBTQ) Programs	\$0	\$0.1M
**School Wellness	\$0	\$1.9M
Enrichment Programs	\$2.3M	\$7.5M
Student Athletics	\$0.8M	\$1.6M
Youth Leadership	\$0.3M	\$0.4M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)*

*Orange = Already identified as a Board Priority*



# Existing LCAP Investments: Goal 3 (continued)

Investment	23-24 LCFF Cost	23-24 Total Cost
Districtwide Communication Support	\$0.4M	\$0.4M
Enrollment Supports	\$1.0M	\$1.3M
Family Partnerships	\$1.8M	\$2.2M
Language Access for Families	\$1.0M	\$2.0M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)*

*Orange = Already identified as a Board Priority*

# Existing LCAP Investments: Goal 4

Investment	23-24 LCFF Cost	23-24 Total Cost
*Staff Recruitment & Retention	\$19.6M	\$30.5M
*Foundational & Asset-Based Professional Development	\$7.0M	\$7.6M
New Teacher Support	\$0.7M	\$2.0M
*School and District Governance Support for Leaders	\$0.3M	\$2.0M

*\*Includes some “must-do” items (e.g., contractual obligations, other binding or mandatory commitments)  
Orange = Already identified as a Board Priority*

# Outcomes

- Update financial outlook and key considerations of budget planning for Fiscal Year 2024-25
- Share realignment options to better match spending to our priorities while maintaining financial health
- Identify next steps in the budget development process

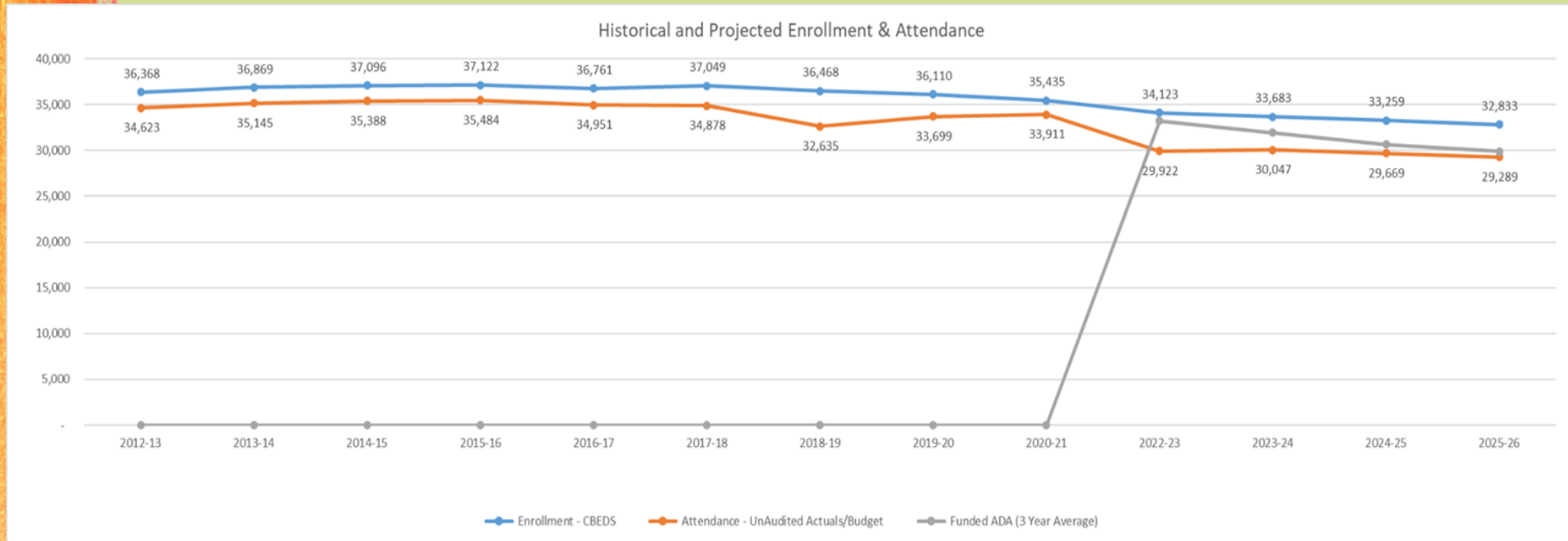
# Reflecting on the roadmap and the path before the journey.





# Financial Outlook and Key Considerations

# The Challenge - LCFF Revenue Threatened



1. Enrollment and attendance are declining.
2. The gap between enrollment and attendance (ADA) is stabilizing at 89% from 94% in 2019-20.
3. The three year average ADA\* is supporting higher revenue for 2022-23 forward, but losing steam by 2025-26.

\*3 Year Average for ADA Implemented in 2022-23 to support statewide loss of enrollment and attendance.

# Changes to the LCFF Calculator

## The Impact of ADA reductions



Due to the rapid changes in our ADA and even with the benefit of a 3 Year Average ADA, the Base is not growing.

LCFF Y/Y Summary	Year	Enrollment	Actual/Proj ADA	Enroll:ADA %	Funded ADA	State Funding	COLA	Total	Net Increase
						Allocation Increase			
	2020-21	35,435	26,924	76%	33,977	7,053.00	0.00%	\$380,649,634	
	2021-22	34,374	29,452	86%	33,888	4,435.55	5.07%	\$410,164,607	\$ 29,514,973
	2022-23	34,123	29,922	88%	33,226	3,303.81	13.26%	\$459,336,101	\$ 49,171,494
	2023-24	33,684	30,047	89%	31,923	1,876.43	8.22%	\$481,611,799	\$ 22,275,698
	2024-25	33,259	29,689	89%	30,664	975.38	3.94%	\$482,940,399	\$ 1,328,600
	2025-26	32,833	29,289	89%	29,878	588.66	3.29%	\$487,400,049	\$ 4,459,650

# Changes to the LCFF Calculator

## The Impact of ADA reductions

The Base LCFF is not growing due to our decline in ADA and the benefit of a three year average slipping fast.

	Year	Base Grant	Grade Span Adjustment	Supplemental Grant	Concentration Grant	Add-ons: Targeted Instructional Improvement Block Grant	Add-ons: Home-to-School Transportation	Add-ons: Home-to-School Transportation	Add-ons: Transitional Kindergarten	Total LCFF
<b>LCFF Allocation x Y</b>	2020-21	\$278,230,067	\$12,137,948	\$44,089,480	\$30,372,495	\$10,094,682	\$5,724,962			\$380,649,634
	2021-22	\$292,073,858	\$12,749,157	\$46,704,983	\$42,816,965	\$10,094,682	\$5,724,962			\$410,164,607
	2022-23	\$324,488,176	\$14,082,917	\$52,783,233	\$50,506,343	\$10,094,682	\$5,724,962		\$1,655,788	\$459,336,101
	2023-24	\$337,586,649	\$14,579,769	\$55,818,378	\$55,510,230	\$10,094,682	\$6,195,554		\$1,826,537	\$481,611,799
	2024-25	\$337,341,039	\$14,458,680	\$56,112,056	\$56,595,780	\$10,094,682	\$6,439,659		\$1,898,503	\$482,940,399
	2025-26	\$339,676,440	\$14,540,582	\$56,731,399	\$57,744,459	\$10,094,682	\$6,651,524		\$1,960,963	\$487,400,049
<b>Net Change Y/Y</b>	2020-21	\$0	\$0	\$0	\$0	\$0	\$0		\$0	
	2021-22	\$13,843,791	\$611,209	\$2,615,503	\$12,444,470	\$0	\$0		\$0	
	2022-23	\$32,414,318	\$1,333,760	\$6,078,250	\$7,689,378	\$0	\$0		\$1,655,788	
	2023-24	\$13,098,473	\$496,852	\$3,035,145	\$5,003,887	\$0	\$470,592		\$170,749	
	2024-25	-\$245,610	-\$121,089	\$293,678	\$1,085,550	\$0	\$244,105		\$71,966	
	2025-26	\$2,335,401	\$81,902	\$619,343	\$1,148,679	\$0	\$211,865		\$62,460	

*Green arrow and yellow highlight indicate the year of change in reductions in funding that begin in 2024-25 due to the decline in ADA. 2025-26 Projections will be updated at First Interim (Dec 2023).*



# 45+ Day Budget MYP

## 2023-24 UnAudited Actuals MYP Fund Balance Summary - Unrestricted

	2023-24 Unrestricted	2024-25 Unrestricted	2025-26 Unrestricted
<b>A. Revenues</b>			
5) Total Revenues	\$ 496,015,930	\$ 497,193,237	\$ 501,756,551
<b>B. Expenditures</b>			
9) Total Expenditures	\$ 414,774,284	\$ 395,698,303	\$ 400,569,950
<b>C. Excess (Deficiency) of Revenues Over Expenditures</b>	\$ 81,241,646	\$ 101,494,935	\$ 101,186,601
<b>D. Other Financing Sources/Uses</b>			
4) Total, Other Financing Sources/Uses	\$ (105,290,313)	\$ (111,843,299)	\$ (117,621,489)
<b>E. Net Increase (Decrease) in Fund Balance (C + D4)</b>	\$ (24,048,668)	\$ (10,348,365)	\$ (16,434,888)
<b>F. Fund Balance, Reserves</b>			
1) Beginning Fund Balance			
a) Adjusted Beginning Balance (F1c + F1d)	\$ 118,353,704	\$ 94,305,037	\$ 83,956,672
2) <b>Ending Balance, June 30 (E + F1e)</b>	\$ 94,305,037	\$ 83,956,672	\$ 67,521,784
Restricted Reserve	\$ 150,000	\$ 150,000	\$ 150,000
Other Assignments	\$ 11,180,840	\$ 10,556,761	\$ 10,556,761
Reserve for Economic Uncertainty	\$ 27,251,099	\$ 26,783,505	\$ 27,436,380
<b>Unassigned Unappropriated</b>	\$ 55,723,097	\$ 46,466,405	\$ 29,378,643

# Base Salary Change Example - 6 Schools

This Chart reflects the net increase in salary *only* from 2023-24 to 2024-25.

*Note: Schools selected randomly to illustrate two schools in each grade span.*

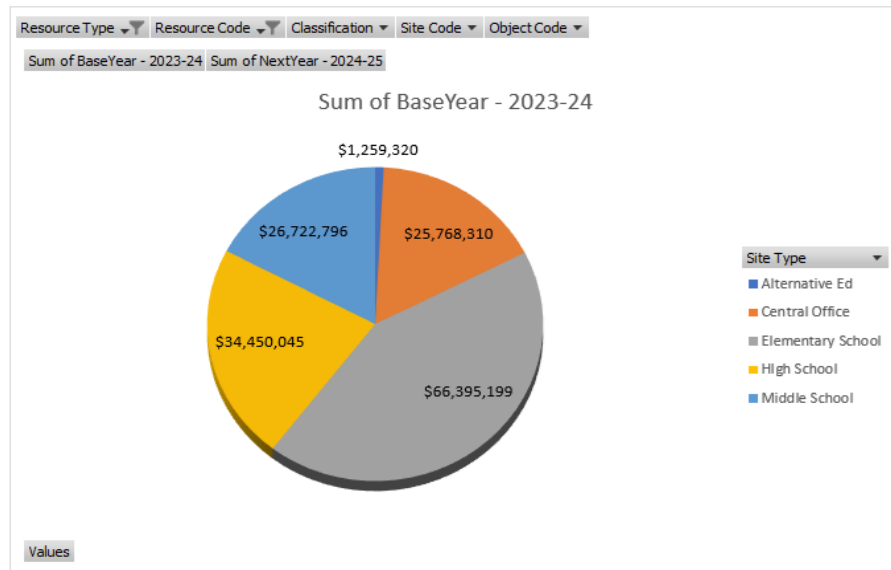
Resource Type		(Multiple Items)			
Resource Code		0000 General Purpose-unrestricted			
Classification		(All)			
			Data		
Site Type	Site Code	Object Code	Sum of BaseYear - 2023-24	Sum of NextYear - 2024-25	Net Change
Elementary School	108 Cleveland	1105 Teachers Salaries	\$1,318,566	\$1,334,116	\$15,550
		1305 Supv, Admin, Instr Coaches Sal	\$126,139	\$126,139	\$0
		2405 Clerical Salaries	\$55,557	\$55,302	-\$255
		2905 Otherclass Salaries	\$5,098	\$5,200	\$102
		<b>108 Cleveland Total</b>	<b>\$1,505,361</b>	<b>\$1,520,759</b>	<b>\$15,398</b>
	146 Piedmont Avenue	1105 Teachers Salaries	\$1,124,025	\$1,141,177	\$17,151
		1305 Supv, Admin, Instr Coaches Sal	\$126,139	\$126,139	\$0
		2205 Classsuppt Salaries	\$15,107	\$15,414	\$306
		2405 Clerical Salaries	\$36,804	\$36,804	\$0
		<b>146 Piedmont Avenue Total</b>	<b>\$1,302,076</b>	<b>\$1,319,534</b>	<b>\$17,458</b>
<b>Elementary School Total</b>			<b>\$2,807,437</b>	<b>\$2,840,292</b>	<b>\$32,855</b>
High School	305 Oakland Tech High School	1105 Teachers Salaries	\$5,987,782	\$6,072,142	\$84,360
		1305 Supv, Admin, Instr Coaches Sal	\$606,464	\$616,824	\$10,360
		2205 Classsuppt Salaries	\$88,329	\$88,262	-\$68
		2405 Clerical Salaries	\$110,818	\$110,818	\$0
		<b>305 Oakland Tech High School Total</b>	<b>\$6,793,393</b>	<b>\$6,888,045</b>	<b>\$94,652</b>
	306 Skyline High School	1105 Teachers Salaries	\$4,889,969	\$4,963,939	\$73,970
		1119 Teacher On Spec Assin School	\$61,983	\$63,906	\$1,923
		1305 Supv, Admin, Instr Coaches Sal	\$505,217	\$510,546	\$5,329
		2205 Classsuppt Salaries	\$73,608	\$73,608	\$0
		2405 Clerical Salaries	\$150,492	\$153,993	\$3,500
<b>306 Skyline High School Total</b>	<b>\$5,681,269</b>	<b>\$5,765,991</b>	<b>\$84,722</b>		
<b>High School Total</b>			<b>\$12,474,662</b>	<b>\$12,654,037</b>	<b>\$179,374</b>
Middle School	212 Roosevelt Middle	1105 Teachers Salaries	\$1,552,292	\$1,585,836	\$33,545
		1305 Supv, Admin, Instr Coaches Sal	\$239,574	\$239,574	\$0
		2205 Classsuppt Salaries	\$34,260	\$36,038	\$1,778
		2405 Clerical Salaries	\$57,364	\$57,364	\$0
		<b>212 Roosevelt Middle Total</b>	<b>\$1,883,490</b>	<b>\$1,918,813</b>	<b>\$35,323</b>
	228 United For Success Academy	1105 Teachers Salaries	\$1,082,882	\$1,101,140	\$18,258
		1305 Supv, Admin, Instr Coaches Sal	\$129,266	\$129,266	\$0
		2205 Classsuppt Salaries	\$36,804	\$36,635	-\$169
		2405 Clerical Salaries	\$94,591	\$95,994	\$1,403
		<b>228 United For Success Academy Total</b>	<b>\$1,343,543</b>	<b>\$1,363,035</b>	<b>\$19,492</b>
<b>Middle School Total</b>			<b>\$3,227,034</b>	<b>\$3,281,848</b>	<b>\$54,815</b>
<b>Grand Total</b>			<b>\$18,509,133</b>	<b>\$18,776,177</b>	<b>\$267,044</b>

# Example: Base Salary Change & Expense Gap

Where do we source \$2.1M From Base to Base?

Resource Type	(Multiple Items)	▼
Resource Code	(Multiple Items)	▼
Classification	(All)	▼
Site Code	(All)	▼
Object Code	(All)	▼

Site Type	Sum of BaseYear - 2023-24	Sum of NextYear - 2024-25	Net Change
Alternative Ed	\$1,259,320	\$1,274,220	\$14,900
Central Office	\$25,768,310	\$26,041,421	\$273,111
Elementary School	\$66,395,199	\$67,299,468	\$904,269
High School	\$34,450,045	\$34,946,319	\$496,274
Middle School	\$26,722,796	\$27,174,202	\$451,406
<b>Grand Total</b>	<b>\$154,595,670</b>	<b>\$156,735,630</b>	<b>\$2,139,960</b>

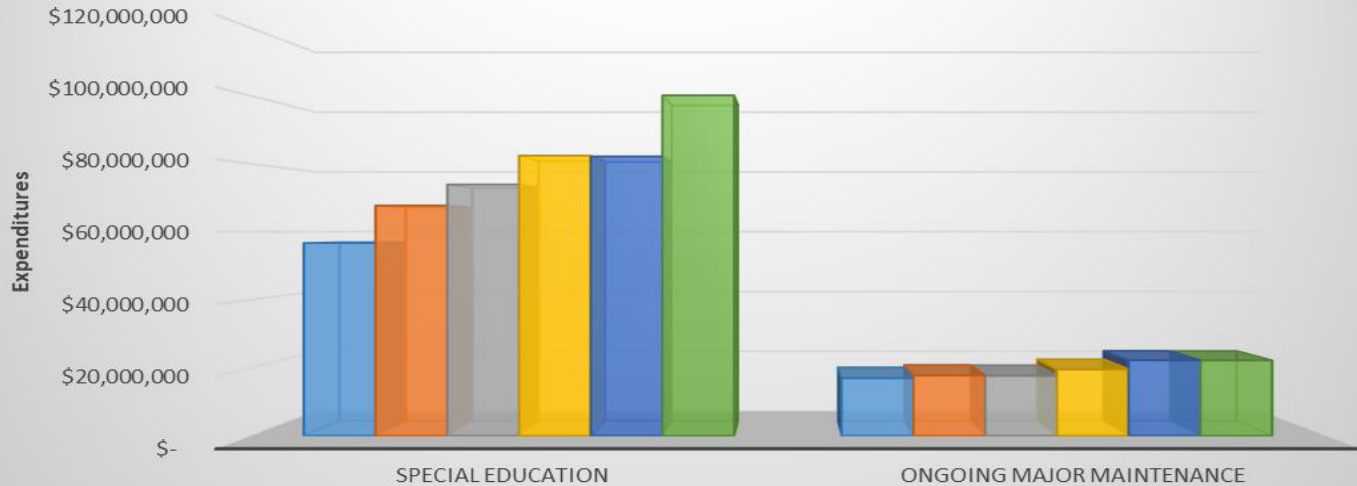


These same forces are also impacting all other backpacks: Title 1, Measure H, Measure G, LCFF resources, grants, etc.

Note: This example does not include the costs associated with salaries of the cost of health care which are projected to increase by 25%.

# Financial Outlook and Key Considerations

## Contributions from the UnRestricted General Fund




	Special Education	Ongoing Major Maintenance
2018-19	\$56,681,804	\$16,951,234
2019-20	\$67,697,721	\$17,737,639
2020-21	\$73,904,685	\$17,653,915
2021-22	\$82,397,905	\$19,551,221
2022-23	\$82,150,146	\$22,217,093
2023-24 Budget	\$100,102,520	\$22,194,028

# Questions to Consider

*The data above show that the LCFF Base is decreasing by \$245K in 2024-25 and the Base salaries are increasing by \$2.1M.*

- ❖ What happens to the backpack when the base revenue stops growing but costs continue to increase?
- ❖ What should happen in OUSD when the base stops growing and costs are increasing in the next year?



**Financial Outlook and Key Considerations**  
***Working in Community to Learn Together &  
Support Decisions with Feedback***

# Which of these are Board and/or District priorities?

Select  
ALL  
that  
apply!



☰ Which of the following are Board/District priorities in the Board work plan, a Board resolution, or a labor agreement?

- Black Reparations
- Attendance
- Staff Pay Increases for Retention
- Maintaining Special Education program locations
- Maintaining same number of schools
- Smaller class sizes than California Education Code requirements
- Maintaining the number of smaller schools
- Improved Academic Outcomes



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# Board Priorities & Investments

2023-24 Board Work Plan	Board Resolutions	Labor Agreements	Other Prioritized LCAP Investments
<ul style="list-style-type: none"> <li>● Attendance</li> <li>● Improved Academic Outcomes</li> <li>● School Continuous Improvement/Redesign</li> <li>● District Redesign/Reorganization</li> <li>● Comprehensive Safety Investments</li> </ul>	<ul style="list-style-type: none"> <li>● George Floyd Resolution</li> <li>● Black Reparations</li> <li>● Maintaining Special Education program locations</li> <li>● Maintaining same number of schools</li> <li>● Deferred Maintenance of School Facilities</li> <li>● Enrollment Stabilization</li> <li>● Behavioral &amp; Mental Health</li> </ul>	<ul style="list-style-type: none"> <li>● Staff Pay Increases for Retention</li> <li>● Smaller class sizes (smaller than CA requirements).</li> </ul>	<ul style="list-style-type: none"> <li>● Ensuring every student has an individual laptop for learning (1:1)</li> <li>● Restorative Justice Program</li> </ul>




Rank these areas based on which will improve student outcomes.

Click and drag responses into top box.



Rank these priority areas based on which will have the greatest impact on improving student outcomes.

- 1 Maintaining SpEd programs
- 2 Staff Pay Increases for Retention
- Drop it here.
- Maintaining # of schools
- Smaller class sizes
- Deferred Maintenance of School Facilities
- District & School Redesign \*
- Restorative Justice Program



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# Rank these areas based on which ones the district will be able to implement successfully.

## Click and drag responses into top box.



Rank these priority areas based on which ones the district will be able to implement most successfully. 0 8

Select options from the list below.

- Restorative Justice Program
- Maintaining the number of smaller schools
- Improved Academic Outcomes \*
- Maintaining # of schools
- Maintaining SpEd programs
- Enrollment Stabilization \*
- District & School Redesign \*



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# If base funding is decreasing, rank these priority areas in order of importance.

Click and drag responses into top box.



↓↑ If base funding is decreasing, rank these priority areas based on which ones are most important to continue funding across the district. 0 👤

Select options from the list below.

- Staff Pay Increases for Retention
- Maintaining 1:1 Technology Investments
- Improved Academic Outcomes \*
- Restorative Justice Program
- Smaller class sizes
- District & School Redesign \*
- Attendance \*



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# Small Group Discussion

- How were your priorities similar or different from the group?
- What values, assumptions and information did your group use in prioritization?
- What surprised you in this exercise?

# We Are Unable to Continue to Hold All Investments and Must Prioritize



# Gentle Reminder - Affordability Commitment

## Excerpt from OEA AB1200 Approval Letter

*“In order for ACOE to verify that Board and District staff are implementing the budget adjustments the Board approved within the Public Disclosure documents, OUSD will:*

- *Provide ACOE with a Board-approved detailed update on its **list of Budget Adjustments by October 31, 2023;***
- *Share additional updates in ACOE’s bi-weekly call to monitor the staff and Board’s progress with strategic planning;*
- *Present a public update to be provided by First Interim, with further public disclosure and **formal Board Action required no later than February 2024,** to ensure the District meets its obligations in the subsequent fiscal year.”*

# Board Member and Community Takeaways

- ❖ Something I learned...
- ❖ Something I want to know more about...
- ❖ A step I will take towards balancing our priorities within our budget will be...
- ❖ I would like to see in future engagements...



# Community Schools, Thriving Students



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

[www.ousd.org](http://www.ousd.org)     [@OUSDnews](https://twitter.com/OUSDnews)

1011 Union Street, Oakland, CA 94607



Board Office Use: Legislative File Info.	
File ID Number	23-1669
Introduction Date	8/3/2023
Enactment Number	23-1630
Enactment Date	9/27/2023 er



# Board Cover Memorandum

**To** Board of Education

**From** Mike Hutchinson, Board President

**Meeting Date** September 27, 2023

**Subject** 2023-24 Board Work Plan

**Ask of the Board** Approval of the 2023-24 Board of Education Work Plan

**Background** It is the practice of the Superintendent and the Board of Education to follow annual work plans to guide their respective activities each year. The Superintendent usually drafts her work plan and then presents it to the Board for review, comment, and (ultimately) approval. The Board President typically takes the lead in drafting the Board’s work plan with input from all Board members, with the Board ultimately approving its work plan as well. It is also typical (and important) for the Superintendent and Board work plans to be aligned. This often takes the form of using the same overarching goals, initiatives, and focus areas and then developing deliverables that are complementary (e.g., a Superintendent work plan deliverable may be to present a plan while the corresponding Board work plan deliverable may be to adopt a plan). Without such alignment, the efforts of the Superintendent (and staff) will be focused on certain areas while the efforts of the Board will be focused on others. This divergence can lead to inefficiencies and a lack of implementation with respect to both work plans.

The Board held a retreat on August 3, 2023 in which an initial draft of the Board Work Plan was presented and discussed. At that meeting, President Hutchinson agreed to collect the feedback from the Board and return with a revised version of the Board’s Work Plan for consideration. Having done so, the proposed final 2023-24 Board Work Plan is attached.

**Fiscal Impact** N/A

**Attachment(s)**

- Board of Education 2023-24 Work Plan



## DRAFT 2023-24 BOARD WORK PLAN

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### Reference Documents:

- [2020-21 Board Work Plan](#) | [2021-22 Board Work Plan](#) | [2022-23 Board Work Plan](#)

### 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.

### Vision

All 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.

### Our Graduate Profile

Resilient Learners | Collaborative Teammates | Community Leaders | Critical Thinkers | Creative Problem Solvers

### Our Values

- ▶ **Students First:** We support students by providing multiple learning opportunities to ensure students feel respected and heard.
- ▶ **Equity:** We provide everyone access to what they need to be successful.
- ▶ **Excellence:** We hold ourselves to uncompromising standards to achieve extraordinary outcomes.
- ▶ **Integrity:** We are honest, trustworthy and accountable.
- ▶ **Cultural Responsiveness:** We resist assumptions and biases and see the gift of every student and adult.
- ▶ **Joy:** We seek and celebrate moments of laughter and wonder.

### Our Goals

Goal 1: All students graduate college, career, and community ready.

Goal 2: Focal student groups demonstrate accelerated growth to close our equity gap.

Goal 3: Students and families are welcomed, safe, healthy, and engaged.

Goal 4: Our staff are high quality, stable, and reflective of Oakland's rich diversity.

Goal 5: Students, families, and staff have the resources and supports necessary to address the impacts of the COVID-19 pandemic.



## **DRAFT 2023-24 BOARD WORK PLAN**

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Dear Oakland Unified Community,

As a school board we have worked hard to stabilize OUSD and now over the next two years we will begin the work of redesigning, restructuring, and reimagining our school district, while also staying focused on regaining full local control and leaving receivership. Here are some of the key components of the 2023-24 School Board Work Plan:

- We will continue to focus on fiscal solvency and sustainability to move OUSD out of receivership.
- We will continue to work to keep our enrollment numbers within the state averages while increasing our efforts to improve attendance and reduce chronic absenteeism.
- We are going to focus on governance, by both increasing the school board's ability and capacity to provide governance and by strengthening our shared governance policies and bodies.
- We plan on beginning the work of re-envisioning OUSD by beginning the process of restructuring/designing the District and launching our first cohort of schools for the Sustainable Community Schools Redesign Process.
- We will continue to develop comprehensive safety plans for our post-pandemic police-free schools.

We will need everyone's help to ensure a successful year. Please get involved and help us make OUSD the public school district Oakland wants and deserves.

In Community,

Mike Hutchinson  
President, Board of Education



## **DRAFT 2023-24 BOARD WORK PLAN**

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### **Overarching Priority Areas:**

- Improve Academic Outcomes
- District & School Redesign
- Attendance & Enrollment
- Comprehensive Safety Plan
- Improved Board Governance
- Shared Governance
- LCAP Adoption & Strategic Plan Extension
- Fiscal Solvency

<b>Initiative #1: Ensuring Strong Readers by the Third Grade</b> <i>Accelerating City Wide Efforts to Guarantee Literacy for all Third Graders</i>	
<b>Actions</b>	<b>Deliverables</b>
Review Early Literacy outcomes and school level curriculum implementation twice a year  Review the effectiveness of tutors and literacy teachers to support student goals for ensuring strong readers.	Adoption of Foundational Reading Skills curriculum.

<b>Initiative #2: Supporting Empowered Graduates</b> <i>Developing Essential Skills to Secure Post-Secondary Success</i>	
<b>Actions</b>	<b>Deliverables</b>
Review high school and college readiness student outcomes and on track cohort	Review staff analysis on impacts of existing efforts in high school to implement



**DRAFT 2023-24 BOARD WORK PLAN**

<p>data two times a year</p> <p>Prioritize allocation of resources to support student goals for ensuring empowered graduates</p> <p>Evaluate progress towards equitable access to Linked Learning Pathways and Work-Based Learning Programs for focal student groups.</p>	<p>mastery-based grading and decide whether or not to adopt any changes to the grading policy with the goal of increasing A-G completion.</p>
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<b>Initiative #3: Creating Joyful Schools</b> <i>Reimagining schools to be places of joy, inclusion, and beauty</i>	
<b>Actions</b>	<b>Deliverables</b>
<p>Establish the community schools grants advisory committee</p> <p>Establish the Thriving Black Students Task Force</p> <p>Review MTSS implementation updates two times a year</p>	<p>Review recommendations and adopt an ongoing budget for prevention and crisis response for police-free schools</p>



## DRAFT 2023-24 BOARD WORK PLAN

<b>Initiative #4: Growing a Diverse and Stable Staff</b>	
<i>Attracting and retaining staff reflective of Oakland's rich diversity</i>	
<b>Actions</b>	<b>Deliverables</b>
<p>Review retention and recruitment outcomes, including the impact of foundational professional development, related to maintaining diverse and stable staff two times a year</p> <p>Review data, discuss and provide direction to bargaining team about key priorities to pursue in negotiations in order to achieve student outcome and staff retention goals</p>	<p>Adopt contracts for labor unions that support goals for increased staff retention and improved student outcomes, by prioritizing increased compensation, and staff collaboration and professional development time</p>
<b>Initiative #5: Creating a Sustainable and Thriving District</b>	
<b>Actions</b>	<b>Deliverables</b>
<p>Adopt a new 3-year LCAP Plan and extend the current strategic plan</p> <p>Return to pre-pandemic procedures for school board meetings</p> <p>Add</p> <p>Leave Receivership (<i>need to identify 2-3 commitments/decisions Board will make to increase district sustainability to leave receivership, which should be clearly stated in the next board work plan</i>)</p> <ul style="list-style-type: none"><li>• Adopt a balanced multi-year budget by June of 2023 with positive certification aligned to LCAP/strategic plan priorities; adopt changes to BP3150 and accompanying policies around site autonomy, and commit to</li></ul>	<p>Adopt a New Board Orientation Plan, which includes the implementation of 7-10 study sessions over two years.</p> <p>Review staff recommendations for revisions to BP 3150 and decide whether or not to adopt a revised policy</p> <p>Adopt a balanced multi-year budget by June of 2024</p>



**DRAFT 2023-24 BOARD WORK PLAN**

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making decisions to set criteria for the school redesign process that address the imbalance between the number of schools and district infrastructure.

Continue to learn and grow as a governance team by taking advantage of the various supports that are offered.

Launch the Sustainable Community Schools Redesign Process by establishing the first cohort of schools and having them begin year 1.

**Attachment B - 2024-25 Budget Development List of Budget Adjustments**

**Budget Deficit Action Steps:** The AB1200 approval letter included several provisions to provide assurance to the County and support for the District to meet its commitments with this salary agreement, by addressing the proposed deficits as it develops its 2024-25 and out year Budgets. The County Stated in its letter to the District:

*(1) In order for ACOE to verify that Board and District staff are implementing the budget adjustments the Board approved within the Public Disclosure documents, OUSD will: Provide ACOE with a Board-approved detailed update on its list of Budget Adjustments by October 31, 2023. This is the one of four conditions to update the County of the District's progress cited in this section and as a CONDITION for the County's approval of the OEA AB1200. The next two update on progress conditions are: (2) Share additional updates in ACOE's bi-weekly call to monitor the staff and Board's progress with strategic planning; (3) Present a public update to be provided by First Interim, (4) with further public disclosure and formal Board Action required no later than February 2024, to ensure the District meets its obligations in the subsequent fiscal year.*

*The District is building its list of responsive budget adjustments starting with the list used for the 2023-24 Adopted Budget, "Attachment A" and will continue the list to address the projected deficits that have been updated in the 45+ Day Revise and out year budgets. At the October 11th and 25th Governing Board meeting, the District will share this list and seek the Board's feedback on each item on the list. It is important that the District staff know where the Board is in approving the items presented in concept and hear additional options to address the projected gaps in the budget.*

Number	Division/Department	Action and Impact	General Purpose Funds (Ongoing)		Central Concentration (Ongoing)	Central Supplemental Funds (Ongoing)		Special Education Funds with contribution from Resource 0000 (Ongoing)		Unrestricted Supplemental Funds (Ongoing)		
			FTE Change	Savings		FTE Change	Savings	FTE Change	Savings	FTE Change	Savings	
1	<p><b>Adjustment to School Site Allocations- Discretionary (Unrestricted)</b>                      Schools receive discretionary funding based on projected student enrollment at each grade level, rather than by a school's grade span. Discretionary funds are intended to cover the cost of a site's basic operational and program needs, including copier agreements, supplies, books, contracted services, and equipment to support the school site educational environment. Graduation costs, WASC dues, and other mandated non-salary costs must also be paid with Discretionary funds. Discretionary funds are currently allocated to school sites using the following grade span formula</p> <p>Grades TK-5: \$60.00 per student                      Grades 6-8: \$75.00 per student                      Grades 9-12: \$100.00 per student</p>	<p>Proposed Reduction to School Site Funding Allocation Effective FY 23-24 <b>for 2024-25 SITE ALLOCATION (ONE PAGERS)</b></p> <p>Grades TK-5: \$50.00 per student                      Grades 6-8: \$65.00 per student                      Grades 9-12: \$80.00 per student</p> <p>Impact: No impact to school allocations in FY 23-24. Starting in FY 24-25, schools will be able to afford less supplies, operational maintenance (i.e. copier upkeep) and/or staff etc. than prior years.</p> <p>Mitigation FY 23-24: Status-quo for 1 year as one-time funds (i.e. ESSER III) will be used to offset the reduction.                      Mitigation FY 24-25: Schools may purchase supplies centrally, allowing for reduction in costs and use other restricted resources to fund priorities.</p>	0.00	\$ (433,000)			0.00	0.00	0.00	0.00		0.00
2	<p><b>Adjustment to School Site Allocations- LCFF</b>                      Schools receive a per pupil allocation of LCFF (Supplemental) funding. The current funding formula is \$785 per eligible student. The count of eligible students is determined by multiplying the projected total enrollment, including SDC students and Late-Arriving Newcomers, but the three-year average of the school's Unduplicated Pupil Percentage (UPP). Unduplicated students are defined by the State as low-income students, English learners, and foster youth.</p> <p>For 2022-23, approximately \$21 million in LCFF Supplemental funds are allocated to schools.</p>	<p>Proposed Reduction to School Site Funding Allocation Adjustment Effective FY 23-24 <b>for 2024-25 SITE ALLOCATION (ONE PAGERS)</b></p> <p>Reduce the per pupil LCFF allocation (Supplemental) from \$785 per student to \$675 per student.</p> <p>Impact: No impact to school allocations in FY 23-24. Starting in FY 24-25, schools will be able to afford less supplies, operational maintenance, and/or staff etc. than prior years.</p> <p>Mitigation FY 23-24: Status-quo for 1 year as one-time funds (i.e. ESSER III) will be used to offset the reduction.                      Mitigation FY 23-24: Schools may adjust services or rely on other restricted funds to ensure a continuity of services and programs.</p>	-	-			-	-	-	-		\$ (2,876,645)



3	<b>Potential Merger of District Schools</b>	<p><b>Background</b></p> <p>The District has successfully implemented mergers of District schools over the last five years. In addition to supporting the District's goal of maintaining fiscal solvency, these mergers have resulted in increased enrollment, gained efficiencies and program improvements. 2023-24 presents an opportunity to launch a planning and redesign process for potential mergers effective with the 2024-35 academic school year.</p> <p>The District proposes a planning year (2023-24) for the potential merger of at least 10 schools effective 2024-25. The District proposes a shift of the below listed positions to one-time funds* in anticipation of the possible mergers.</p> <p>Teacher (1.1 FTE)  Principals (5.0 FTE)  Clerical (5.5 FTE)  Attendance (2.5 FTE)  Noon Supt. (1.2 FTE)  CSM (1.4 FTE)  Support Position (1.0 FTE)</p> <p>*In addition to ESSER funds, allowable use of other one-time funding sources will be evaluated for the purpose of this shift.</p>	(17.70)	\$ (2,477,792)			0.00	0.00	0.00	0.00		0.00
4	<b>Review and adjust Budget allocations to absorb future year salary projections, but not exceed current year dollar allocations.</b>	Follow BP 3150 and re-establish the definition of the following: The allocation of OUSD financial resources to schools shall be maximized. This means that we have to level set the allocations to fit within our means as BP 3150 also says, Still, it is the Board's categorical expectation that all education providers operating or desiring to operate school programs in Oakland - district or charter – as well as families, staff, community members and labor unions, will accept shared responsibility for the sustainability of our school system and embrace the idea that we: (i) do not operate in silos, (ii) are interdependent in our efforts to serve all students and families; and (iii) need to act with consideration of the larger community of schools. We also recognize the challenging work ahead of building and rebuilding trust among the diverse members of our community in realizing this vision. In addition to the supplemental LCFF allocation noted above, adjust all site allocations within all resources to absorb the projected salary increases for 2024-25 up to the dollar amounts allocated in 2023-24 and provide additional allocations AFTER the District confirms it's ability to make subsequent allocations after the May 2024 Revise.										
5	Central Office - Continuous School Improvement	Assess the Decision of the Implementation Plan and sourcing needs for positions recommended for elimination and addition and the impact to the budget by resource.										
6	Central Office - Legal	Redesign Work in Progress										
7	Central Office - Business/Talent/Technology	Complete Recommendation from School Services Review										
8	Review all Board Resolutions to made decisions about which programs we are maintaining.	Recommendation from President Hutchinson, October 2, 2023 Special Board Meeting										
9	Review and analyze Special Education Program cost escalation to support multi-year projections and District impact.	The District has seen an exponential growth in the contribution to Special Education of \$43M over the past five years. The District needs to review the program to understand and share the impact of the contribution as it has grown to 1/3 of our Base Funding, where 17% of our enrolled students are supported by our Special Education Programs. It is imperative that the District understand that costs, drivers, and are able to predict where it will be as we look forward. The intent of this analysis is to understand the program's cost escalation as it will directly impact our ongoing base flexibility and its required and policy driven responsibilities.										

Number	Budget Additions											
1	Ongoing Enrollment Office Investments	The District has evaluated it's progress after the implementation of the enrollment stabilization policy change in 2021-22 and in an effort to continue the improvement is seeking to retain funding to support the annual software license agreement with Enrollwise and additional marketing the data has found beneficial in our efforts to market the educational experience in our District, retain our existing families, and introduce ourselves to others.										
2	A Review on One Time Investments that are returning to the Base and Other Resources	A review of items placed in one time resources that may return/are requested to return to the Base due to funding, like COVID Relief dollars that are sunseting. Some items were noted Attachment A and are projected to return to the General Fund as noted by the Trustee and or other analysis. All labor and on labor investments must be reviewed.										
3	Review Facilities and Deferred Maintenance Modifications	The District needs to return to the Board to review the underfunded Deferred Maintenance Plan and develop of method to fund programs that are funded after emergencies, but lack proper staffing and preparation for future challenges with our facilities.										

🕒 Attachment B- 2024-25 Revised Budget Development List of Budget Adjustments

**Attachment B - 2024-25 Budget Development List of Budget Adjustments**

**Budget Deficit Action Steps:** The AB1200 approval letter included several provisions to provide assurance to the County and support for the District to meet its commitments with this salary agreement, by addressing the proposed deficits as it develops its 2024-25 and out year Budgets. The County Stated in its letter to the District:

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Board Response?

Yes/No

**Attachment B - 2024-25 Budget Development List of Budget Adjustments**

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			FTE Change	Savings			FTE Change	Savings	FTE Change	Savings	FTE Change	Savings
3	<b>AMENDMENT Potential Merger of District Schools</b>	<p><b>Background</b></p> <p>The District proposes a planning year (2023-24) for the potential merger of at least 10 schools effective 2024-25. Before any closures or consolidations take place, the District will comply with the guidelines set forth in AB 1912 which requires a district, before approving the closure or consolidation of a school, to conduct an equity impact analysis in its consideration of school closures or consolidations. The governing board of the school district would be required to "develop a set of metrics, as specified, for the development of the equity impact analysis, and to make those metrics public at a regularly scheduled meeting of the governing board of the school district so that the public can provide input regarding the metrics being used to conduct the analysis, as provided."</p> <p>The District proposes a shift of the below listed positions to one-time funds* in anticipation of the possible mergers.</p> <p>Teacher (1.1 FTE) Principals (5.0 FTE) Clerical (5.5 FTE) Attendance (2.5 FTE) Noon Supt. (1.2 FTE) CSM (1.4 FTE) Support Position (1.0 FTE)</p> <p>*In addition to ESSER funds, allowable use of other one-time funding sources will be evaluated for the purpose of this shift.</p>	(17.70)	\$ (2,477,792)			0.00	0.00	0.00	0.00		0.00
4	<b>Review and adjust Budget allocations to absorb future year salary projections, but not exceed current year dollar allocations.</b>	<p>Follow BP 3150 and re-establish the definition of the following: The allocation of OUSD financial resources to schools shall be maximized. This means that we have to level set the allocations to fit within our means as BP 3150 also says, Still, it is the Board's categorical expectation that all education providers operating or desiring to operate school programs in Oakland - district or charter – as well as families, staff, community members and labor unions, will accept shared responsibility for the sustainability of our school system and embrace the idea that we: (i) do not operate in silos, (ii) are interdependent in our efforts to serve all students and families; and (iii) need to act with consideration of the larger community of schools. We also recognize the challenging work ahead of building and rebuilding trust among the diverse members of our community in realizing this vision. In addition to the supplemental LCFF allocation noted above, adjust all site allocations within all resources to absorb the projected salary increases for 2024-25 up to the dollar amounts allocated in 2023-24 and provide additional allocations AFTER the District confirms it's ability to make subsequent allocations after the May 2024 Revise.</p>										

Board Response?



**Attachment B - 2024-25 Budget Development List of Budget Adjustments**

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The District is building its list of responsive budget adjustments starting with the list used for the 2023-24 Adopted Budget, "Attachment A" and will continue the list to address the projected deficits that have been updated in the 45+ Day Revise and out year budgets. At the October 11th and 25th Governing Board meeting, the District will share this list and seek the Board's feedback on each item on the list. It is important that the District staff know where the Board is in approving the items presented in concept and hear additional options to address the projected gaps in the budget.

Number	Division/Department	Action and Impact	General Purpose Funds (Ongoing)		Central Concentration (Ongoing)		Central Supplemental Funds (Ongoing)		Special Education Funds with contribution from Resource 0000 (Ongoing)		Unrestricted Supplemental Funds (Ongoing)	
			FTE Change	Savings			FTE Change	Savings	FTE Change	Savings	FTE Change	Savings
5*	Central Office - Continuous School Improvement	Assess the Decision of the Implementation Plan and sourcing needs for positions recommended for elimination and addition and the impact to the budget by resource. <b>Interest in CSI Redesign Implementation: mostly in adjustments to the curriculum dept and the office of equity.</b>										
6*	Central Office - Legal	Redesign Work in Progress. <b>Support for Legal Dept Restructuring: use of paralegals instead of attorneys and reducing consultant contracts.</b>										
7*	Central Office - Business/Talent/Technology and All OTHER Departments not noted with non-represented staff.	Complete Recommendation from School Services Review. <b>Interest in Reclassification of non-represented staff positions: we are partially doing this through the restructuring in the Legal Dept and CSI but assessing and evaluating all positions.</b>										
8	Review all Board Resolutions to made decisions about which programs we are maintaining.	Recommendation from President Hutchinson, October 2, 2023 Special Board Meeting										
9	Review and analyze Special Education Program cost escalation to support multi-year projections and District impact.	The District has seen an exponential growth in the contribution to Special Education of \$43M over the past five years. The District needs to review the program to understand and share the impact of the contribution as it has grown to 1/3 of our Base Funding, where 17% of our enrolled students are supported by our Special Education Programs. It is imperative that the District understand that costs, drivers, and are able to predict where it will be as we look forward. The intent of this analysis is to understand the program's cost escalation as it will directly impact our ongoing base flexibility and its required and policy driven responsibilities.										
10	Reduction in Board Pay and Engagement Funds											
11	School Redesign from Jan '23 Board Resolution											

Number	Budget Additions											
1*	Ongoing Enrollment Office Investments	The District has evaluated it's progress after the implementation of the enrollment stabilization policy change in 2021-22 and in an effort to continue the improvement is seeking to retain funding to support the annual software license agreement with Enrollwise and additional marketing the data has found beneficial in our efforts to market the educational experience in our District, retain our existing families, and introduce ourselves to others. <b>Interest in Enrollment and Attendance: maintenance of the enrollment office budget and exploring the addition of attendance teams to help students get to/stay in school.</b>										
2	A Review on One Time Investments that are returning to the Base and Other Resources	A review of items placed in one time resources that may return/are requested to return to the Base due to funding, like COVID Relief dollars that are sunseting. Some items were noted Attachment A and are projected to return to the General Fund as noted by the Trustee and or other analysis. All labor and on labor investments must be reviewed.										



Board Response?

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**Attachment B - 2024-25 Budget Development List of Budget Adjustments**

**Budget Deficit Action Steps:** The AB1200 approval letter included several provisions to provide assurance to the County and support for the District to meet its commitments with this salary agreement, by addressing the proposed deficits as it develops its 2024-25 and out year Budgets. The County Stated in its letter to the District:

*(1) In order for ACOE to verify that Board and District staff are implementing the budget adjustments the Board approved within the Public Disclosure documents, OUSD will: Provide ACOE with a Board-approved detailed update on its list of Budget Adjustments by October 31, 2023. This is the one of four conditions to update the County of the District's progress cited in this section and as a CONDITION for the County's approval of the OEA AB1200. The next two update on progress conditions are: (2) Share additional updates in ACOE's bi-weekly call to monitor the staff and Board's progress with strategic planning; (3) Present a public update to be provided by First Interim, (4) with further public disclosure and formal Board Action required no later than February 2024, to ensure the District meets its obligations in the subsequent fiscal year.*

*The District is building its list of responsive budget adjustments starting with the list used for the 2023-24 Adopted Budget, "Attachment A" and will continue the list to address the projected deficits that have been updated in the 45+ Day Revise and out year budgets. At the October 11th and 25th Governing Board meeting, the District will share this list and seek the Board's feedback on each item on the list. It is important that the District staff know where the Board is in approving the items presented in concept and hear additional options to address the projected gaps in the budget.*

Number	Division/Department	Action and Impact	General Purpose Funds (Ongoing)		Central Concentration (Ongoing)		Central Supplemental Funds (Ongoing)		Special Education Funds with contribution from Resource 0000 (Ongoing)		Unrestricted Supplemental Funds (Ongoing)	
			FTE Change	Savings			FTE Change	Savings	FTE Change	Savings	FTE Change	Savings
3*	Review Facilities and Deferred Maintenance Modifications	The District needs to return to the Board to review the underfunded Deferred Maintenance Plan and develop of method to fund programs that are funded after emergencies, but lack proper staffing and preparation for future challenges with our facilities. <b>Interest in Priorities for Safety: Facilities needs and the recruitment, retention and training of staff.</b>										

Board Response?

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## Assembly Bill No. 1912

### CHAPTER 253

An act to add and repeal Section 41329 of the Education Code, relating to emergency apportionments, and declaring the urgency thereof, to take effect immediately.

[Approved by Governor September 6, 2022. Filed with Secretary of State September 6, 2022.]

#### LEGISLATIVE COUNSEL'S DIGEST

AB 1912, Mia Bonta. Emergency apportionments: closure and consolidation requirements.

Existing law authorizes the governing board of a school district, if it determines during a fiscal year that its revenues are less than the amount necessary to meet its current year expenditure obligations, to request an emergency apportionment through the Superintendent of Public Instruction, as provided. Existing law imposes certain conditions and requirements on a school district that accepts an emergency apportionment, including, among others, that the governing board of the school district prepare a report on the financial condition of the school district. Existing law requires the report to include, among other things, specific actions taken to reduce expenditures or increase income, and the cost savings and increased income resulting from those actions.

This bill would require a school district under financial distress, as defined, before approving the closure or consolidation of a school, to conduct an equity impact analysis in its consideration of school closures or consolidations, as provided. The bill would require the governing board of the school district to develop a set of metrics, as specified, for the development of the equity impact analysis, and to make those metrics public at a regularly scheduled meeting of the governing board of the school district so that the public can provide input regarding the metrics being used to conduct the analysis, as provided. To the extent the bill imposes additional duties on local educational agencies, the bill would impose a state-mandated local program. The bill would provide that its provisions do not apply to a school district's closure of a school due solely to the unsafe condition of the school's facilities. The bill would make these provisions inoperative as of July 1, 2028.

The California Constitution requires the state to reimburse local agencies and school districts for certain costs mandated by the state. Statutory provisions establish procedures for making that reimbursement.

This bill would provide that, if the Commission on State Mandates determines that the bill contains costs mandated by the state, reimbursement

for those costs shall be made pursuant to the statutory provisions noted above.

This bill would declare that it is to take effect immediately as an urgency statute.

*The people of the State of California do enact as follows:*

SECTION 1. Section 41329 is added to the Education Code, immediately following Section 41328, to read:

41329. (a) A school district under financial distress, as defined in subdivision (b), shall do all of the following before approving the closure or consolidation of a school of the school district:

(1) In deciding what schools to close or consolidate, the governing board of the school district shall conduct an equity impact analysis in its consideration of school closures or consolidations. The governing board of the school district shall develop a set of metrics for the development of the equity impact analysis and make those metrics public at a regularly scheduled meeting of the governing board of the school district so that the public can provide input regarding the metrics being used to conduct the analysis. The metrics shall include, but are not limited to, all of the following:

(A) The condition of a school facility.

(B) The operating cost of a school and the associated savings resulting from a closure or consolidation.

(C) The capacity of a school to accommodate excess pupils.

(D) Special programs available at the schools being considered for closure or consolidation and whether those programs will be provided at the same current level at the schools to which pupils will be diverted.

(E) Environmental factors, including, but not limited to, traffic and proximity to freeway access.

(F) Balance of pupil demographics, including race or ethnicity, pupils with disabilities, English learners, foster youth, and homeless youth, in the schools being considered for closure or consolidation, and the resulting demographic balance of pupils after placement in other schools, in order to determine if the decision to close or consolidate will have a disproportionate impact on any particular demographic group.

(G) Transportation needs of pupils.

(H) Aesthetics and the opportunity for blight and negative impact on the surrounding community.

(I) Impact on feeder school attendance patterns with the closure of any particular school and whether the closure will attenuate attendance at other schools or specialized programs as a result.

(2) (A) The governing board of the school district shall provide its recommendations regarding school closures and consolidations to the public at a regularly scheduled meeting and share how it prepared its list and include, at a minimum, all of the following information:

(i) Factors used to identify the list of school closures or consolidations.

(ii) Equity impact analysis findings for each school closure or consolidation.

(iii) Plan for the use of the schools proposed for closure or consolidation once it becomes a vacated facility.

(iv) Criteria used to assign displaced pupils to other schoolsites, or a description of the process of reassignment that will be used by the school district.

(v) Options and timeline for transitioning pupils to their new schools, including improving safe routes to schools and home-to-school transportation needs.

(B) The governing board of the school district shall review and consider the feedback presented at the public meeting and make its decision on any school closures or consolidations at a subsequently scheduled regular meeting.

(C) At the subsequent regularly scheduled meeting, the governing board of the school district shall present its final recommendation for school closures or consolidations, which shall include a review of how public input was incorporated into the final recommendation. Any affirmative action by the governing board of the school district to implement a school closure or consolidation shall be made only after it adopts a resolution concluding that the community engagement process required pursuant this section has been completed.

(D) (i) Upon an affirmative action by the governing board of the school district to implement a school closure or consolidation, the school district shall provide information to parents and pupils in multiple formats, including, but not limited to, email and paper notifications.

(ii) Notifications to parents shall be translated into their primary language pursuant to Section 48985.

(iii) The information shall include all of the following:

(I) The date of the approved closure or consolidation.

(II) The pupil's new school assignment, as applicable.

(III) School district resources for pupils and parents to support the pupil's transition.

(IV) School district contacts for additional information.

(b) For purposes of this section, "financial distress" means a school district with an emergency apportionment pursuant to Article 2 (commencing with Section 41320) or this article, a trustee appointed pursuant to Article 2 (commencing with Section 41320), or an administrator appointed pursuant to this article.

(c) For purposes of this section, "governing board of a school district" includes a trustee appointed pursuant to Article 2 (commencing with Section 41320), or an administrator appointed pursuant to this article.

(d) This section does not apply to a school district's closure of a school due solely to the unsafe condition of the school's facilities.

(e) The process outlined pursuant to this section shall not take more than 12 months from the initiation of the equity impact analysis pursuant to paragraph (1) of subdivision (a) to the notification to parents of the final

determination of the governing board of the school district pursuant to subparagraph (D) of paragraph (2) of subdivision (a).

(f) This section shall become inoperative on July 1, 2028, and, as of January 1, 2029, is repealed.

SEC. 2. If the Commission on State Mandates determines that this act contains costs mandated by the state, reimbursement to local agencies and school districts for those costs shall be made pursuant to Part 7 (commencing with Section 17500) of Division 4 of Title 2 of the Government Code.

SEC. 3. This act is an urgency statute necessary for the immediate preservation of the public peace, health, or safety within the meaning of Article IV of the California Constitution and shall go into immediate effect. The facts constituting the necessity are:

In order to mitigate, as soon as possible, the impacts of declining enrollment and chronic absenteeism, due to both long-term demographic trends and the COVID-19 pandemic, which will result in the closure of schools, it is necessary for this act to take effect immediately.