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

Board Cover Memorandum

To Board of Education

From Kyla Johnson-Trammell, Superintendent
Lisa Grant-Dawson, Chief Business Officer
Jenine Lindsey, General Counsel

Meeting Date June 11, 2025

Subject Tentative Agreement between the Oakland Education Association and the Oakland Unified School District- Budget Adjustments

Ask of the Board Approval of the Tentative Agreement between the Oakland Unified School District and the Oakland Education Association in compliance with Government Code section 3547.5, all applicable AB 1200 disclosure requirements, and all necessary follow-up actions as determined by the Alameda County Office of Education.

Background On April 30, 2025, ACOE received a Public Disclosure of Collective Bargaining Agreement (CBA) and Tentative Agreement (TA) between OUSD and OEA as required by Government Code (GC) Section 3547.5 and Assembly Bill (AB) 1200 (Statutes of 1991, Chapter 1213). The TA in its entirety is attached to the legislative file.

Discussion Government Code 3547.5(a) states: “Before a public school employer enters into a written agreement with an exclusive representative covering matters within the scope of representation, the major provisions of the agreement, including, but not limited to, the costs that would be incurred by the public school employer under the agreement for the current and subsequent fiscal years, shall be disclosed at a public meeting of the public school employer in a format established for this purpose by the Superintendent of Public Instruction.”

AB 1200 (specifically Government Code section 3540.2) requires: “A school district that has a qualified or negative certification . . . shall allow the county office of education in which the school district is located at least 10 working days to review and comment on any proposed agreement made between the exclusive representative and the public school employer, or designated representatives of the employer, pursuant to this chapter. The school district shall provide the county superintendent of schools with all information relevant to yield an understanding of the financial impact of that agreement.” In response, “[t]he county superintendent of schools shall notify the school district, the county board of

education, the district superintendent, the governing board of the school district, and each parent and teacher organization of the district within those 10 days if, in his or her opinion, the agreement reviewed pursuant to subdivision (a) would endanger the fiscal well-being of the school district.”

Fiscal Impact

See AB 1200 Public Disclosure for fiscal impact details.

Attachment(s)

- AB1200 Collective Bargaining Board Letter
- AB 1200 Public Disclosure
- Tentative Agreement between OEA and OUSD

Tentative Agreement Between
OEA and OUSD
4/30/2025

MEMORANDUM OF UNDERSTANDING
BETWEEN
OAKLAND UNIFIED SCHOOL DISTRICT
AND
OAKLAND EDUCATION ASSOCIATION
Impacts and Effects of Budget Adjustments Effective July 1, 2025

Memorandum of Understanding (“MOU”) between Oakland Unified School District (“District”) and Oakland Education Association (“OEA”), collectively “Parties” regarding Budget Adjustments effective July 1, 2025.

WHEREAS, the Board of Education approved elimination and additions effective July 1, 2025 school year;

WHEREAS, OEA, the exclusive representative of impacted by the approved changes identified impacts and effects to the bargaining unit;

WHEREAS, OEA proposed changes through good faith negotiation of the impacts and effects; and

WHEREAS, the Parties share an interest in promoting harmonious labor relations and increasing morale in the District;

1. **STIP Subs.** The District will fund-a minimum of (65) sixty-five FTE STIP positions for the 25-26 school year. These position assignments will prioritize high needs schools as determined by the District. With the exception of STIP Subs centrally assigned (i.e. to support Early Childhood (ECE), STIP subs will continue to be site-based. The parties recognize that the main priority of STIP subs is to cover teacher absences of any length at their site.
2. **11-month teachers at hard-to-fill high schools.** Teachers at Castlemont, Fremont and McClymonds High Schools will continue to have 11-month assignments through the end of the 2025-2026 school year using supplemental and/or concentration carryover funds.
3. **Nurses.** The Union understands that the 2 vacant FTE nurse positions for caseload

reduction per 21.9 will not be filled in the 2025-26 school year due to lack of available funding. To the extent feasible, these positions will be filled in the following year if funding is available.

4. **ELD and Continuation Teachers.** The Union agrees to withdraw its proposed language on ELD teachers in recognition that the impact is currently moot or has been addressed through other means. However, the Union expressly reserves the right to revisit and reintroduce this proposal in future negotiations should circumstances materially change.
5. **Info Requests:** To demonstrate a good faith effort to explore resolutions, The Union agrees to withdraw RFI 25-17 (financial analysis of budget cuts) and RFI 25-22 (budget savings per board resolution) and Unfair Labor Practice Charges SF-CE-3654-E (RFI on HBGB Communication), SF-CE-3653-E (RFI on Transformational School Redesign Communications) and SF-CE-3659-E (RFI on school closure plan communications), effective as of the date of this Agreement.
6. All fiscal impacts of this MOU are contingent upon a determination by the Alameda County Office of Education that the combined financial impact of all tentative agreements with OUSD labor partners reached in the 2024-2025 school year do not endanger the fiscal well-being of the District. The Board's ratification of the agreement shall occur within 15 days of receipt of the AB 1200 letter from ACOE with such a determination.
7. In recognition of the Parties need to prioritize impact bargaining and the shared interest in cultivating improved labor relations, the Parties agree to continue successor contract negotiations through the Fall of 2025.
8. Expiration. This MOU resolves the impacts and effects to unit members of budget adjustments effective July 1, 2025. This MOU is non-precedent setting and expires without prejudice on June 30, 2026.

For OEA:

For OUSD:

Kampala Tarz Rancier

Jenine Lindsey

Name

Name

K. S. Rancier

Signature

Jenine Lindsey

Signature

anmie Xiang
Samir Khattab

Vanessa Raabe

Yanir Obedo-finkel

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Jessica Chen

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Alameda County Office of Education - Business Advisory Services

Public Disclosure of Collective Bargaining Agreements General Instructions

Requirement to Disclose for Public Review:

Assembly Bill 1200 Public Disclosure of Proposed Collective Bargaining Agreements requires local educational agencies to publically disclose the provision of all collective bargaining agreements before entering into a written agreement. Government Code (GC) Section 3547.5 states:

"Before a public school employer enters into a written agreement with an exclusive representative covering matters within the scope of representation, the major provisions of the agreement, including, but not limited to, the costs that would be incurred by the public school employer under the agreement for the current and subsequent fiscal years, shall be disclosed at a public meeting of the public school employer."

- ▶ Please make the disclosure document available for public review prior to the governing board taking action on the proposed bargaining agreement. The entire collective bargaining disclosure document, including multiyear projections, the Superintendent / CBO certifications and assumptions, and board actions needed in current and subsequent years, must be reviewed by the board prior to board action on the agreement.
- ▶ If the District would like a formal letter indicating ACOE review, please indicate on the form and provide *at least* 10 working days prior to the date needed for board action.
- ▶ The manner in which the public is made aware of the proposed agreement and its availability for public inspection and review is at the discretion of the district. Districts may select one or more methods for communicating to the public as long as notification includes the public at large and is not limited to district parents only. The standard disclosure document should be utilized and be available for public review.

Requirement to Submit to ACOE:

- ▶ Districts with a qualified or negative certification **MUST** submit documents to the County Office for review and comment at least 10 working days prior to the date of board action. This includes any modification to existing agreements(s). [GC 3540.2]
- ▶ Within 45 days of adopting a collective bargaining agreement, the superintendent of the school district shall forward to the County Superintendent of Schools any revisions to the school district's current year budget that are necessary to fulfill the terms of that agreement. [GC 42142]
- ▶ [All required documents to be submitted to the County Office with each collective bargaining are indicated in blue on this page.](#)

What to Disclose:

- ▶ Any time a contract is reopened with an impact on "any area of the existing contract", financial or non-financial, a disclosure of the proposed agreement must be made. This is especially applicable to multiyear agreements that are tied to projected cost of living adjustments in the subsequent years. Once an actual percentage rate and dollar increase is established, that salary increase must be disclosed even though it may have been partially budgeted.

- ▶ If the only change is non-financial and in language only, please describe the agreement in the Narrative section (Page 2) and put N/A in the financial sections.
- ▶ Please complete separate documents for each collective bargaining agreement, but if more than one agreement is discussed at the same time, you may summarize the financial impact of "all" agreements (further instructions provided on the forms).
- ▶ The District must conduct a fiscal impact analysis of the settlement for ALL FUNDS affected, and disclose the potential for deficits in any fund as a result of the settlement and the potential impact of such deficits on the General Fund.
- ▶ Attach a copy of the proposed bargaining agreement to each disclosure form. Tentative Agreements submitted to the County Office should be signed by all the necessary and represented parties.

CERTIFICATION FORMS:

Certificate of Affordability

- ▶ The **Certificate of Affordability** - Certification of the District's Ability to Afford the costs of a Collective Bargaining Agreement - must be signed by the District Superintendent and Chief Business Official (CBO) at the time of public disclosure and submitted to County Office. "I hereby certify" or "I am unable to certify" must be checked by both signers.
- ▶ The Superintendent's and CBO's certifications are meant to be independent of one another.
- ▶ The certifications serve as additional information provided to the board regarding the affordability of the proposed agreement before the board takes action on the agreement.
- ▶ The certifications should be accompanied by:
 - The fiscal planning assumptions that are used in making the certification.
 - Any qualifying comments made by the Superintendent and/or CBO that speak to the agreement's affordability within the context of the district's entire budget.
- ▶ The absence of a certification signature or a check on the "I am unable to certify" line does not prevent a board from taking action on an agreement. However, if a board approves an agreement missing a certification signature or with the "I am unable to certify" checked, it is still expected to adopt the budget revisions needed to pay for the agreement.
- ▶ The Alameda County Office of Education (ACOE) will process any payroll adjustments reflected in an agreement, even if the superintendent and/or CBO do not provide certifying signatures. However, the absence of a certification signature or if the "I am unable to certify" box is checked serves as an alert to the ACOE to carefully analyze and review the district's ability to fund the agreement.
- ▶ Within 45 days of adopting a collective bargaining agreement, or prior to, or with its next interim report submission (or budget submission if the agreement is adopted after the submittal of the district's Second Interim Report), whichever comes first, any budget revisions to the school district's current year budget that are necessary to fulfill the terms of the agreement must be forwarded to the ACOE. If a school district does not adopt all of the revisions to its budget needed in the current fiscal year to meet the costs of a collective bargaining agreement, the County Superintendent of Schools is required to issue a qualified or negative certification of the district's next interim report (Ed Code Section 42142).

Certification of Board Action

- ▶ The **Certification of Board Action** must be signed by the District Superintendent at the time of public disclosure and submitted with the completed disclosure forms to the County Office.
- ▶ After the Governing Board takes action on the proposed agreement, Certification of Board Action must be signed by the Board President or Clerk and resubmitted to the County Office.



Alameda County Office of Education - Business Advisory Services

**Public Disclosure of Collective Bargaining Agreements
Specific Instructions**

- * Complete Page 1 for each Bargaining Unit.
- * If multiple bargaining unit agreements are settled concurrently, show combined fiscal impact in pages 2-5.
- * The MYP should combine the impact of all bargaining units.
- * **If a settlement results in significant impact to funds other than the General Fund, please provide disclosure (pages 1 - 5) for the other funds.**
- * Is a Retroactive payroll anticipated? If so, please provide a cashflow with an estimated timeline of when this will impact the District's General Fund cash.

Certificate of Affordability

In Year 1, include the costs associated with any one-time payments in the One-time line and the on-going cost to be incurred in Year 1 in the On-going line.

In Year 2, include any one-time costs to be paid in year 2, and the ongoing cost, above the most recently approved MYP .

In Year 3, include any one-time costs to be paid in year 3, and the ongoing cost, above the most recently approved MYP .

The "Total" line and "Cumulative cost over 3 years" column will be auto-calculated.

e.g.

Cost over current budget / MYP	Year 1	Year 2	Year 3	Cumulative cost over 3 years
One-time	600,000	-	-	600,000
On-going	1,000,000	1,015,000	1,030,225	3,045,225

In this example, there is a one-time payment that totals \$600,000 in the current year, plus an ongoing increase to the salary schedule that will cost \$1,000,000 in the current year. The ongoing increase will cost \$1,000,000 + a step and column of an additional 1.5% in year 2. In Year 3, the Year 2 amount is increased by another 1.5%. The Cumulative cost column provides an estimate of the total cost of this settlement over the current and two subsequent years.

Please indicate whether budget revisions will be necessary.

If revisions will be necessary, provide the details in the table below, or, if more detail is needed, in an attachment.

The Certificate of Affordability - Certification of the District's Ability to Afford the costs of a Collective Bargaining Agreement - must be signed by the District Superintendent and Chief Business Official (CBO) at the time of public disclosure. "I hereby certify" or "I am unable to certify" must be checked by both signers.

The Superintendent's and CBO's certifications are meant to be independent of one another.

The certifications serve as additional information provided to the board regarding the affordability of the proposed agreement before the board takes action on the agreement.

The certifications should be accompanied by:

- The fiscal planning assumptions that are used in making the certification.
- Any qualifying comments made by the Superintendent and/or CBO that speak to the agreement's affordability within the context of the district's entire budget.

The absence of a certification signature or a check on the "I am unable to certify" line does not prevent a board from taking action on an agreement. However, if a board approves an agreement missing a certification signature or with the "I am unable to certify" checked, it is still expected to adopt the budget revisions needed to pay for the agreement.

ACOE will process any payroll adjustments reflected in an agreement, even if the superintendent and/or CBO do not provide certifying signatures. However, the absence of a certification signature or if the "I am unable to certify" box is checked serves as an alert to the ACOE to carefully analyze and review the district's ability to fund the agreement.

Within 45 days of adopting a collective bargaining agreement, or prior to, or with its next interim report submission (or budget submission if the agreement is adopted after the submittal of the district's Second Interim Report), whichever comes first, any budget revisions to the school district's current year budget that are necessary to fulfill the terms of the agreement must be forwarded to the ACOE. If a school district does not adopt all of the revisions to its budget needed in the current fiscal year to meet the costs of a collective bargaining agreement, the County Superintendent of Schools is required to issue a qualified or negative certification of the district's next interim report (Ed Code Section 42142).

Page 1: Fiscal Impact

Please fill in highlighted (yellow) cells only. Other cells will automatically calculate.

If a letter is requested from the Alameda County Superintendent to the District Board, please indicate and allow 10 working days.

A. Proposed Changes in Compensation

The purpose of this table is to isolate the various components of a settlement and the timing of when the financial components take effect. Also, it ensures that related costs are reflected in the total cost.

FY - Fill in the Fiscal Year. The "Annual Cost" column and the "Year 1" column are the current fiscal year.

Annual Cost column: Enter the costs for the bargaining unit prior to the proposed agreement. Please use the latest approved budget. If the costs of the settlement are already included in the budget, back-out the settlement costs to indicate the costs prior to settlement.

Year 1, Year 2 and Year 3: Year 1 is current fiscal year. For an on-going agreement that increases the salary schedule in Year 1, the step and column associated with the additional salary should be entered in Year 2 and Year 3. For a multiyear agreement that is implemented over several years, indicate the additional cost in the year the cost goes into effect, i.e., an additional % increase in Year 2 or Year 3..

Line 1: Salary Schedule, including salary increase in first year of implementation, plus step and column on the settlement amount in subsequent years. Report only the cost of salaries excluding statutory and health /welfare benefits.

Line 2: Other Compensation. Report only the cost of "other compensation" provided in the agreement, such as stipends. Exclude statutory and health/welfare benefits.

Line 2a: Description of Other Compensation: Indicate Specific changes in "Other Compensation" for each affected year. E.g., one-time \$100 per employee.

Line 3: Statutory Benefits. Report only the cost of statutory benefits associated with the agreement excluding health/welfare benefits.

Line 4: Health/Welfare Benefits. Report only the cost of health/welfare benefits associated with the agreement, excluding the cost of salaries and statutory benefits.

Line 5: Total Cost of Negotiated Settlement - automatically adds lines 1 through 4.

Line 6: Total number of represented employees. Enter the full-time equivalent (FTE) employees for the affected bargaining unit.

Line 7: Total compensation average cost per employee. Automatically calculates average based on total cost and total FTE.

Page 2A: Unrestricted General Fund Revised Budget

D. Impact of Proposed Agreement on Current Year Operating Budget - UNRESTRICTED GENERAL FUND

Column 1: Please input the latest Board-Approved UNRESTRICTED General Fund budget. If the settlement was already included, back out the settlement to show the pre-settlement amounts.

Column 2: Please input the current fiscal year costs of the settlement. This should come from Page 1, Section A. Proposed Change in Compensation, Year 1 column.

Column 3: Please input any other revisions due to the Settlement. If other bargaining unit agreements are pending or recently settled, Column 3 can be used to show the revisions necessary for the other units.

Column 4: Automatically calculated. This column should reflect the current budget, as adjusted for all agreements.

Reserve Requirement: Please input district's reserve percentage in box on page 2A (cell P24)

Data entered on Page 2A and 2B, Unrestricted and Restricted General Fund, will automatically populate page 2C, Combined General Fund as well as the first column (current year) of the Multiyear Projections (MYP), Page 5.

Page 2B: Restricted General Fund Revised Budget

D. Impact of Proposed Agreement on Current Year Operating Budget - RESTRICTED GENERAL FUND

Column 1: Please input the latest Board-Approved RESTRICTED General Fund budget. If the settlement was already included, back out the settlement to show the pre-settlement amounts.

Column 2: Please input the current fiscal year costs of the settlement. This should come from Page 1, Section A. Proposed Change in Compensation, Year 1 column.

Column 3: Please input any other revisions due to the Settlement. If other bargaining unit agreements are pending or recently settled, then Column 3 can be used to show the revisions necessary for the other units.

Column 4: Automatically calculated. This column should reflect the current budget, as adjusted for all agreements.

Data entered on Page 2A and 2B, Unrestricted and Restricted General Fund, will automatically populate page 2C, Combined General Fund as well as the first column (current year) of the Multiyear Projections (MYP), Page 3.

Page 2C: Combined General Fund Revised Budget

D. Impact of Proposed Agreement on Current Year Operating Budget - COMBINED GENERAL FUND

This page will self-populated from Page 2A and 2B. HOWEVER, PLEASE REVIEW FOR ACCURACY.

Page 3: Revised Multi-Year Projections

E. Revised MYP Including the Effects of Collective Bargaining

Year 1 will auto-populate from Page 2C Combined General Fund Total New Budget column.

Year 2 & Year 3 - these columns should tie to the most recent Board-approved MYP, with adjustments as needed and identified on the Certificate of Affordability.

Expenditures - Step & Column Adjustment - the salary amount will auto populate from prior year; input the Step & Column estimate for all salaries (including any amount related to the settlement) here.

Expenditures - Settlement-Related Costs (+/-) - for years 2 and Year 3, input any changes related to the settlement here; e.g., reversing a one-time bonus or including an increase that starts in Year 2 or Year 3.

Expenditures - Other Adjustments - staffing changes or other adjustments not directly related to the settlement should be input here. Also, explain these adjustments on Page 3, Funding Source, #17.

F. State Reserve Standard

1.a., b., c. will auto populate from MYP Table above.

2 a. & b. will auto populate from table above.

2 c. & d. - Please INPUT information from Fund 17

3 - Auto-calculates whether reserve has been met. Please provide an explanation if reserve is less than requirement.

4. Please provide a cash flow projection if a retroactive payment is anticipated.

Page 4: Narrative

B. Narrative Description of Agreement

Questions are self-explanatory. Complete this section even if there are is no monetary component to the agreement.

Page 5: Funding Source

C. Source of Funding for Proposed Agreement:

Questions are self-explanatory.

Public Disclosure of Collective Bargaining Agreement

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

Name of District: Oakland UnifiedName of Bargaining Unit: Oakland Educators Association and United AdministratorsCertificated or Classified: Certificated and ClassifiedThe proposed agreement covers the period beginning: 7/1/2025 and ending: 6/30/2026
(date) (date)The Governing Board will take action on: 6/11/2025
(date)Letter requested from Alameda County Office of Education? Yes (indicate yes or no)**A. Proposed Changes in Compensation**

Bargaining Unit Compensation Changes to General Fund as a result of Collective Bargaining Agreement		Annual Cost Prior to Proposed Agreement FY 2024-25 3Int	Fiscal Impact of Proposed Agreement (complete Year 2 and 3 for multiyear & overlapping agreements only)		
			Year 1 Increase/(Decrease)	Year 2 Increase/(Decrease)	Year 3 Increase/(Decrease)
			FY 2024-25	FY 2025-26	FY 2026-27
1	Salary Schedule Increase (Decrease)	\$ 416,957,972	\$ -	\$ 1,230,231	
			0.00%	0.30%	0.00%
2	Step & Column Increase (Decrease) due to movement plus any changes due to settlement		\$ -		
			0.00%	0.00%	0.00%
3a	Other Compensation Stipends, Bonuses, Longevity, Overtime Differential, Callback or Standby Pay, etc.				
			0.00%	0.00%	0.00%
3b	Description of Other Compensation (Listed on Line 3 above)				
4	Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.	\$ 226,904,705	\$ -	\$ 669,480	
			0.00%	0.30%	0.00%
5	Health/Welfare Increases	\$ -	\$ -		
			0.00%	0.00%	0.00%
6	Total Cost of Negotiated Settlement (Add Items 1 through 5 to equal 6)	\$ 643,862,677	\$ -	\$ 1,899,711	\$ -
			0.00%	0.30%	0.00%
7	Total number of represented Employees (Use FTEs)				
8	Total Compensation <u>Average</u> Cost per Employee	\$ -	\$ -	\$ -	\$ -
			0.00%	0.00%	0.00%

Public Disclosure of Collective Bargaining Agreement

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

Name of District: **Oakland Unified**

Name of Bargaining Unit: **Oakland Educators Association and United Administrators of Oakland**

The Governing Board will take action on: **6/11/2025**

D. Impact of Proposed Agreement on Current Year Operating Budget - UNRESTRICTED GENERAL FUND

	Column 1	Column 2	Column 3	Column 4
Impact of the Proposed Agreement on the Current Year Operating Budget (EC 42142)	Latest Board-Approved Budget Before Settlement FY 2024-25 3Int	Adjustments as a result of Settlement	Other Revisions due to Settlement and/or Other Unit Agreements	Total New Budget (Col 1+2+3)
Revenues				
LCFF Sources (8010-8099)	\$ 477,470,950	\$ -	\$ -	\$ 477,470,950
Federal Revenue (8100-8299)	\$ -	\$ -	\$ -	\$ -
Other State Revenue (8300-8599)	\$ 12,821,555	\$ -	\$ -	\$ 12,821,555
Other Local Revenue (8600-8799)	\$ 21,379,739	\$ -	\$ -	\$ 21,379,739
Total Revenues	\$ 511,672,245	\$ -	\$ -	\$ 511,672,245
Expenditures				
Certificated Salaries (1000-1999)	\$ 185,577,769	\$ -	\$ -	\$ 185,577,769
Classified Salaries (2000-2999)	\$ 62,422,821	\$ -	\$ -	\$ 62,422,821
Employee Benefits (3000-3999)	\$ 117,241,166	\$ -	\$ -	\$ 117,241,166
Books and Supplies (4000-4999)	\$ 18,187,734	\$ -	\$ -	\$ 18,187,734
Services & Operating Expenses (5000-5999)	\$ 67,352,193	\$ -	\$ -	\$ 67,352,193
Capital Outlay (6000-6599)	\$ 4,485,580	\$ -	\$ -	\$ 4,485,580
Other Outgo (7100-7299 & 7400-7499)	\$ 4,263,974	\$ -	\$ -	\$ 4,263,974
Direct Support/Indirect Cost (7300-7399)	\$ (13,232,067)	\$ -	\$ -	\$ (13,232,067)
Total Expenditures	\$ 446,299,171	\$ -	\$ -	\$ 446,299,171
Operating Surplus (Deficit)	\$ 65,373,073	\$ -	\$ -	\$ 65,373,073
Other Sources and Transfers In (8910-8979)	\$ -	\$ -	\$ -	\$ -
Other Uses and Transfers Out (7610-7699)	\$ 2,985,000	\$ -	\$ -	\$ 2,985,000
Contributions (8980-8999)	\$ (122,343,445)	\$ -	\$ -	\$ (122,343,445)
Current Year Increase (Decrease) In Fund Balance	\$ (59,955,372)	\$ -	\$ -	\$ (59,955,372)
Beginning Balance	\$ 117,224,617			\$ 117,224,617
Pr. Year Audit Adj./Restatements (9793-9795)				\$ -
Current Year Ending Balance	\$ 57,269,246	\$ -	\$ -	\$ 57,269,246
Components of Ending Balance				
Reserved and Legally Restricted (9711-9740)				\$ -
Reserved for Economic Uncertainties (9789)	\$ 28,299,818.14	\$ -	\$ -	\$ 28,299,818
Designated Amounts (9775-9780)	\$ 10,750,564			\$ 10,750,564
Unappropriated Amounts (9790)	\$ 18,218,864	\$ -	\$ -	\$ 18,218,864
Comments (Major changes):				

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

Name of District:

Oakland Unified

Name of Bargaining Unit:

Oakland Educators Association and United Administrators of Oakland

The Governing Board will take action on:

6/11/2025

D. Impact of Proposed Agreement on Current Year Operating Budget - RESTRICTED GENERAL FUND

Impact of the Proposed Agreement on the Current Year Operating Budget (EC 42142)	Column 1 Latest Board- Approved Budget Before Settlement FY 2024-25 3Int	Column 2 Cost of of Settlement	Column 3 Other Revisions due to Settlement	Column 4 Total New Budget (Col 1+2+3)
Revenues				
LCFF Sources (8010-8099)	\$ 4,470,504	\$ -	\$ -	\$ 4,470,504
Federal Revenue (8100-8299)	\$ 67,096,459	\$ -	\$ -	\$ 67,096,459
Other State Revenue (8300-8599)	\$ 167,053,473	\$ -	\$ -	\$ 167,053,473
Other Local Revenue (8600-8799)	\$ 93,482,941	\$ -	\$ -	\$ 93,482,941
Total Revenues	\$ 332,103,377	\$ -	\$ -	\$ 332,103,377
Expenditures				
Certificated Salaries (1000-1999)	\$ 96,063,615	\$ -	\$ -	\$ 96,063,615
Classified Salaries (2000-2999)	\$ 72,893,767	\$ -	\$ -	\$ 72,893,767
Employee Benefits (3000-3999)	\$ 109,663,539	\$ -	\$ -	\$ 109,663,539
Books and Supplies (4000-4999)	\$ 38,295,610	\$ -	\$ -	\$ 38,295,610
Services & Operating Expenses (5000-5999)	\$ 145,024,279	\$ -	\$ -	\$ 145,024,279
Capital Outlay (6000-6599)	\$ 13,007,697	\$ -	\$ -	\$ 13,007,697
Other Outgo (7100-7299 & 7400-7499)	\$ 7,929,911	\$ -	\$ -	\$ 7,929,911
Direct Support/Indirect Cost (7300-7399)	\$ 11,164,681	\$ -	\$ -	\$ 11,164,681
Total Expenditures	\$ 494,043,100	\$ -	\$ -	\$ 494,043,100
Operating Surplus (Deficit)	\$ (161,939,723)	\$ -	\$ -	\$ (161,939,723)
Other Sources and Transfers In (8910-8979)	\$ -	\$ -	\$ -	\$ -
Other Uses and Transfers Out (7610-7699)	\$ -	\$ -	\$ -	\$ -
Contributions (8980-8999)	\$ 122,343,445	\$ -	\$ -	\$ 122,343,445
Current Year Increase (Decrease) In Fund Balance	\$ (39,596,278)	\$ -	\$ -	\$ (39,596,278)
Beginning Balance	\$ 190,827,687			\$ 190,827,687
Pr. Year Audit Adj./Restatements (9793-9795)				\$ -
Current Year Ending Balance	\$ 151,231,409	\$ -	\$ -	\$ 151,231,409
Components of Ending Balance				
Reserved and Legally Restricted (9711-9740)	\$ 151,231,409	\$ -	\$ -	\$ 151,231,409
Reserved for Economic Uncertainties (9789)				
Designated Amounts (9775-9780)	\$ -	\$ -	\$ -	\$ -
Unappropriated Amounts (9790)	\$ 0			\$ 0
Comments (Major changes):				

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

Name of District:

Oakland Unified

Name of Bargaining Unit:

Oakland Educators Association and United Administrators of Oakland

The Governing Board will take action on:

6/11/2025

D. Impact of Proposed Agreement on Current Year Operating Budget - COMBINED GENERAL FUND

Impact of the Proposed Agreement on the Current Year Operating Budget (EC 42142)	Column 1 Latest Board- Approved Budget Before Settlement FY 2024-25 3Int	Column 2 Cost of of Settlement	Column 3 Other Revisions due to Settlement	Column 4 Total New Budget (Col 1+2+3)
Revenues				
LCFF Sources (8010-8099)	\$ 481,941,454	\$ -	\$ -	\$ 481,941,454
Federal Revenue (8100-8299)	\$ 67,096,459	\$ -	\$ -	\$ 67,096,459
Other State Revenue (8300-8599)	\$ 179,875,028	\$ -	\$ -	\$ 179,875,028
Other Local Revenue (8600-8799)	\$ 114,862,681	\$ -	\$ -	\$ 114,862,681
Total Revenues	\$ 843,775,622	\$ -	\$ -	\$ 843,775,622
Expenditures				
Certificated Salaries (1000-1999)	\$ 281,641,385	\$ -	\$ -	\$ 281,641,385
Classified Salaries (2000-2999)	\$ 135,316,588	\$ -	\$ -	\$ 135,316,588
Employee Benefits (3000-3999)	\$ 226,904,705	\$ -	\$ -	\$ 226,904,705
Books and Supplies (4000-4999)	\$ 56,483,344	\$ -	\$ -	\$ 56,483,344
Services & Operating Expenses (5000-5999)	\$ 212,376,473	\$ -	\$ -	\$ 212,376,473
Capital Outlay (6000-6599)	\$ 17,493,278	\$ -	\$ -	\$ 17,493,278
Other Outgo (7100-7299 & 7400-7499)	\$ 12,193,885	\$ -	\$ -	\$ 12,193,885
Direct Support/Indirect Cost (7300-7399)	\$ (2,067,386)	\$ -	\$ -	\$ (2,067,386)
Total Expenditures	\$ 940,342,271	\$ -	\$ -	\$ 940,342,271
Operating Surplus (Deficit)	\$ (96,566,649)	\$ -	\$ -	\$ (96,566,649)
Other Sources and Transfers In (8910-8979)	\$ -	\$ -	\$ -	\$ -
Other Uses and Transfers Out (7610-7699)	\$ 2,985,000	\$ -	\$ -	\$ 2,985,000
Contributions (8980-8999)	\$ 0	\$ -	\$ -	\$ 0
Current Year Increase (Decrease) In Fund Balance	\$ (99,551,649)	\$ -	\$ -	\$ (99,551,649)
Beginning Balance	\$ 308,052,305			\$ 308,052,305
Pr. Year Audit Adj./Restatements (9793-9795)	\$ -			\$ -
Current Year Ending Balance	\$ 208,500,655	\$ -	\$ -	\$ 208,500,655
Components of Ending Balance				
Reserved and Legally Restricted (9711-9740)	\$ 151,231,409	\$ -	\$ -	\$ 151,231,409
Reserved for Economic Uncertainties (9789)	\$ 28,299,818	\$ -	\$ -	\$ 28,299,818
Designated Amounts (9775-9780)	\$ 10,750,564	\$ -	\$ -	\$ 10,750,564
Unappropriated Amounts - Unrestricted (9790)	\$ 18,218,864	\$ -	\$ -	\$ 18,218,864
Unappropriated Amounts - Restricted (9790)	\$ 0	\$ -	\$ -	\$ 0
Unrestricted Reserves Percentage	4.93%			4.93%
Comments (Major changes):				

Public Disclosure of Collective Bargaining Agreement

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

Name of District:

Oakland Unified

Name of Bargaining Unit:

Oakland Educators Association and United Administrators of Oak

The Governing Board will take action on:

6/11/2025

E. Revised MYP Including the Effects of Collective Bargaining

	Year 1	Year 2	Year 3
	FY 2024-25	FY 2025-26	FY 2026-27
Revenues			
LCFF Revenue Sources	481,941,454	496,300,673	510,937,867
Federal Revenue	67,096,459	64,792,908	57,546,211
Other State Revenue	179,875,028	156,902,837	182,985,750
Local Revenue	114,862,681	111,834,986	114,280,543
Other Financing Sources	0		
Other Adjustments		15,000	
Total Revenue	843,775,622	829,846,404	865,750,372
Expenditures			
Certificated Salaries	281,641,385	281,641,385	302,941,417
Step & Column Adjustment		5,673,541	6,046,865
Settlement-Related Costs (+/-)		557,430	
Other Adjustments		15,069,062	(1,757,203)
Total Certificated Salaries	281,641,385	302,941,417	307,231,079
Classified Salaries	135,316,588	135,316,588	134,513,509
Step & Column Adjustment		2,368,040	2,353,986
Settlement-Related Costs (+/-)		672,801	
Other Adjustments		(3,843,921)	(2,339,223)
Total Classified Salaries	135,316,588	134,513,509	134,528,272
Employee Benefits	226,904,705	236,225,660	239,276,804
Settlement-Related Costs (+/-)		0	
Books & Supplies	56,483,344	44,646,823	39,577,019
Services, Other Operating Exp	212,376,473	200,921,687	198,447,747
Capital Outlay	17,493,278	12,325,532	11,824,580
Other Outgo (Excluding Transfers of Indirect Costs)	12,193,885	10,050,812	10,050,812
Other Outgo - Transfers of Indirect Costs	(2,067,386)	(1,196,671)	(1,688,397)
Other Financing Uses	2,985,000	3,000,000	3,000,000
Other Adjustments		(21,555,496)	(39,336,756)
Total Expenditures	943,327,271	921,873,272	902,911,162
Net Increase(Decrease) in Fund Balance	(99,551,649)	(92,026,868)	(37,160,790)
Beginning Fund Balance	308,052,305	208,500,655	116,473,787
Audit Adjustments/Restatements	0		
Ending Balance	208,500,655	116,473,787	79,312,997
Components of Ending Balance			
Revolving & Stores	300,854	150,000	150,000
Restricted Balance & Other Designations	161,981,973	108,704,072	72,437,921
Required Reserve	28,299,818	27,656,198	27,087,335
Unrestricted Balance (Incl Revolving)	17,918,010	(20,036,483)	(20,362,258)
ADA Assumption:			

Comments (Major changes):

Changes adjusted to MYP which included the adjustments in the MYP per the approved Attachment C, which were amended and therefore retained for 2025-26, excluding the 58 STIP subs now being funded by the Base.

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

F. State Reserve Standard

1. Calculate State Required Minimum Reserve - Required Reserve for Economic Uncertainty (REU)

	Year 1	Year 2	Year 3
a. Total Expenditures including Transfers Out and Other Uses	943,327,271	921,873,272	902,911,162
b. Required Reserve Percentage (REU) for this District	3.00%	3.00%	3.00%
c. REU Amount:	\$ 28,299,818	\$ 27,656,198	\$ 27,087,335

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

a. General Fund Unrestricted REU	\$ 28,299,818	\$ 27,656,198	\$ 27,087,335
b. General Fund Unrestricted Unassigned/Unappropriated	\$ 17,918,010	\$ (20,036,483)	\$ (20,362,258)
c. Special Reserve Fund 17- REU	\$ -	\$ -	\$ -
d. Special Reserve Fund 17- Unassigned/Unappropriated	\$ -	\$ -	\$ -
g. Total District Budgeted Unrestricted Reserves	\$ 46,217,828	\$ 7,619,715	\$ 6,725,077

3. Has the minimum state-required reserve been met? **Yes** **No** **No**

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

4. Is a retroactive payroll anticipated? If yes, please provide a cashflow with an estimated timeline of when this will impact the District's General Fund cash.

Public Disclosure of Collective Bargaining Agreement

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

Name of District: **Oakland Unified**

Name of Bargaining Unit: **Oakland Educators Association and United Administrators of Oakland**

The Governing Board will take action on: **6/11/2025**

C. Source of Funding for Proposed Agreement

14. Source of Funding for Proposed Agreement

A. If this is a one-time or off-schedule settlement, how will the cost of the proposed agreement be funded and when is the payment expected to be funded?

Unrestricted and Restricted Funding based on the position location.

B. If this is not a one-time settlement, how will the ongoing cost of the proposed agreement be funded in the current and subsequent years (i.e., what will allow the district to afford this contract on an ongoing basis)?

The District will need to continue to prioritize and make reductions.

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

N/A

16. Will this agreement create, increase, or decrease deficit spending in the current or subsequent year(s)? "Deficit spending" is when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

Increase

17. Were "Other Adjustments" amount(s) entered in the multiyear projections (page 5) for 1st and 2nd subsequent fiscal years?

<u>MYP</u>	<u>Amount</u>	<u>"Other Adjustments" Explanation</u>
1st Subsequent Year	\$ (10,330,355)	The District has resources that are sunseting
2nd Subsequent Year	\$ (43,433,181)	The District has resources that are sunseting

Additional Explanation (if necessary)

See Supporting documents.

Public Disclosure of Collective Bargaining Agreement

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

Name of District:

Oakland Unified

Name of Bargaining Unit:

Oakland Educators Association and United Adminstrators of Oakland

The Governing Board will take action on:

6/11/2025

B. Narrative Description of Agreement

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

N/A

9. **Were any additional steps, columns or ranges added to the schedules?**

(If yes, please explain.)

N/A

10. **Please include additional comments and explanations as necessary.**

(If more room is necessary, please attach additional sheet.)

This AB1200 is written in a way that assumes the recommendations that were approved in Attachment C for STIP subs, 11-Month Teachers, and CSM's were being implemented, though actually being repealed. The true net impact is the increase of 8 additional STIP subs that were negotiated as part of the Impact bargaining, which is above the 45 proposed in Attachment C. The remaining changes are status quo arrangements; thus, the costs continue from 2024-25 to 2025-26. The impact to the

11. **Proposed negotiated changes in non-compensation Items**

(e.g. class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

N/A

12. **What contingency language is included in the proposed agreement (e.g. reopeners, etc.)?**

N/A

13. **Identify other major provisions that do not directly affect the district's costs; such as binding arbitration, grievances procedures, etc.**

N/A

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In accordance with AB1200 (Chapter 1213/1991) and GC 3547.5.

CERTIFICATE OF AFFORDABILITY

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

This disclosure document must be signed by the District Superintendent and Chief Business Official prior to public disclosure and included as part of the public disclosure documentation.

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

For an ongoing cost, please show the ongoing cost in each year. For a one-time cost, only include the cost in the year impacted.

Cost over current budget / MYP	Year 1	Year 2	Year 3	Cumulative cost over 3 years
One-time	-	-	-	-
On-going	-	1,899,711	-	1,899,711
Total	-	1,899,711	-	1,899,711

Please check one of the following:

☐ No budget revisions are necessary for the District to afford this settlement.

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

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

Indicate any changes from the latest board approved budget:

Budget Adjustment Categories	Change to Fund Balance Increase (Decrease)		
	Year 1	Year 2	Year 3
Revenues/Other Financing Sources			
Expenditures/Other Financing Uses			
Increased salary costs	-	1,899,711	-
		-	
Ending Fund Balance Increase (Decrease)	-	(1,899,711)	-

Please review the above and sign below:

In accordance with the requirements of Government Code Section 3547.5, the Superintendent and Chief Business Official of the _____ Oakland Unified _____ School District hereby certify that the District can meet the costs incurred under the Collective Bargaining

DocuSigned by:

Kyla Johnson Trammell

704F762B847AE4F3...

District Superintendent (Signature)

6/6/2025

Date

Kyla Johnson-Trammell

District Superintendent (Type Name)

DocuSigned by:

Lisa Grant-Dawson

704F762B847AE4F3...

Chief Business Official (Signature)

6/6/2025

Date

Lisa Grant-Dawson

Chief Business Official (Type Name)

Oakland Unified School District
Public Disclosure of Collective Bargaining Agreement
In accordance with AB1200 (Chapter 1213/1991) and GC 3547.5.

Certification of Board Action

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

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

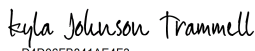
DocuSigned by:

34B08F8B44AE4F8...
District Superintendent (or Designee)
(Signature)

6/6/2025

Date

After public disclosure of the major provisions contained in this summary, the Governing Board, at its meeting on 6/11/2025, took action to approve the proposed Agreement with the itors Association and United AdminstratBargaining Unit.

DocuSigned by:

34B08F8B44AE4F8...
President (or Clerk), Governing Board
(Signature)

6/6/2025

Date

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