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Board Cover Memorandum

To Board of Education

From Kyla Johnson-Trammell, Superintendent
 Lisa Grant-Dawson, Chief Business Officer
 Kimberly Raney, Executive Director Procurement, Transportation, & Warehouse

Board Meeting Date March 13, 2024

Subject Home to School Transportation Reimbursement

FIRST READING

Ask of the Board Receive for First Read, the Transportation Plan for the 2024-25 Fiscal Year: thereby supporting the District’s eligibility for Reimbursement of Home to School Transportation Expenses per California Education Codes § 41850.1 and 39800.1.

Background In 2022, the California Assembly adopted Assembly Bill (AB) 181, Chapter 52, which was later amended by AB 185, Chapter 521. The intent of the bills was to provide reimbursement for funding for school districts and county offices of education. Upon the onset of the Local Control Funding Formula in 2012-13, school districts and county offices have received a flat rate of funding. For Oakland Unified, that amount was \$5,724,962. The 2023-24 LCFF Budget has fortunately now added additional funding to our District of \$472K annually.

Education Code § 41850.1 reads as follows:

(a)(1) Commencing with the 2022-23 fiscal year and for each fiscal year thereafter, the Superintendent shall apportion to each school district and county superintendent of schools that provides pupil transportation services, a transportation allowance equal to 60 percent of the home-to-school transportation expenditures reported by the school district or county superintendent of schools, as determined by its Function 3600 entry in the Standardized Account Code Structure (SACS) report, consistent with the definition in the California School Accounting Manual, for the prior year, excluding capital outlay and nonagency expenditures. This allowance shall be reduced by the amount of the transportation add-on computed for the prior fiscal year under paragraph (1) of subdivision (h) of Section 42238.02 and adjusted under paragraph (3) of subdivision (h) of Section 42238.02 for a school district or subparagraph (A) of paragraph (2) of subdivision (e) of Section 2574 and adjusted under subparagraph (C) of paragraph (2) of subdivision (e) of Section 2574 for a county superintendent of schools. If this reduction results in an amount less than zero, the transportation allowance under this section shall be zero.

The coinciding Education Code §39800.1 also provides the following requirements:

(a) As a condition of receiving apportionments under Section 41850.1, a local educational agency shall develop a plan describing the transportation services it will offer to its pupils, and how it will prioritize planned transportation services for pupils in transitional kindergarten, kindergarten, and any of grades 1 to 6, inclusive, and pupils who are low income.

The plan shall be adopted by the local educational agency's governing board on or before April 1, 2023 and updated by April 1 each year thereafter. The plan shall include the following components: **(1)** A description of the local educational agency's transportation services that would be accessible to pupils with disabilities and homeless children and youth, as defined pursuant to the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11301 et seq.). **(2)** A description of how unduplicated pupils, as defined in subdivision (b) of Section 42238.02, would be able to access available home-to-school transportation at no cost to the pupils. **(b)(1)** The plan shall be developed in consultation with classified staff, teachers, school administrators, regional local transit authorities, local air pollution control districts and air quality management districts, parents, pupils, and other stakeholders. **(2)** The plan shall be presented and adopted by the governing board of the local educational agency in an open meeting with the opportunity for in-person and remote public comment. **(c)** The plan may provide for the local educational agency to partner with a municipally owned transit system to provide service pursuant to this section to middle school and high school pupils. **(d)** Nothing in a local educational agency's plan shall preclude a local educational agency from providing no-cost transit passes to pupils. **(e)** For purposes of this section, "local educational agency" means a school district, excluding a school district with a districtwide charter petition approved pursuant to Section 47606, or a county office of education.

The District was eligible for this funding in the 2023-24 year, but was unable to meet the April 1 engagement and approval deadline due to the impact of the recession of the school closures and the amendments made to the Board Agenda planning cycle and budget development. The District received the \$3.5M apportionment in June 2023, but not plan to retain nor use these resources, as we were clear about our ineligibility. A receivable was booked in preparation for the State to request the return of the proceeds received. This ineligibility due to the lack of an adopted plan by April 1, 2023 was also noted as a finding on our 2022-23 Financial Audit, 2023-007.

The District is providing the following plan and summary of the OUSD Transportation Operations, which has a total budget of \$16.4M of which \$6.1M is funded from the Local Control Funding Formula, and \$10.2M is

funded from the Unrestricted General Fund. The District has not proposed nor is it proposing a change in the current suite of services at this time; therefore, the plan is to continue to provide the transportation services that we have provided historically and as programs and demand changes. The Unrestricted General Fund has continued to offset the increases to expenses and will obtain relief with this reimbursement opportunity. As operational costs continue to rise and the District's student population and need changes, expenditures automatically increase, even amidst our decline in enrollment and attendance. The District staff will also include this item on the March 14, 2024 Budget and Finance Meeting and also submit this item for Second Read and approval at the March 27, 2024 Governing Board Meeting.

Recommendation

Receive for First Read, the Transportation Plan for the 2024-25 Fiscal Year: thereby supporting the District's eligibility for Reimbursement of Home to School Transportation Expenses per California Education Codes § 41850.1 and 39800.1.

Attachment(s)

- Presentation 2024-25 Transportation Plan
- Transportation Budget

Oakland Unified School District 2024-25 Transportation Plan

As Required In Accordance with Education Code
39800.1 and 41850.1

**Kimberly Raney, Executive Director Procurement,
Transportation & Warehouse**

Board of Education Meeting - March 13, 2024



**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.



Ask of the Board

- Receive for information, review, and adopt the District's Transportation Plan per AB181
- Receive notice that the Transportation Plan was due to be adopted by the Board April 1, 2023; however, the District will reserve these funds as they may be subject to recovery.
 - Review will be included in our 2022-23 Audit
 - Estimated reimbursement amount to be received \$3,468,152
 - Scheduled to be included in our P-2 Apportionment

Outline

- Background - AB 181 & 185
 - Education Codes 39800.1 and 41850.1
- OUSD Current Transportation Services
- Summary of the Transportation Plan



Background

Education Codes 39800.1 and 41850.1

Education Codes 39800.1 and 41850.1

- Home-to-School (HTS) Transportation Reimbursement was implemented by Assembly Bill (AB) 181 (Chapter 52, Statutes of 2022) and amended by AB 185 (Chapter 571, Statutes of 2022). It provides reimbursement funding for school districts and county offices of education (COEs) based on the prior year eligible transportation expenditures and prior year Local Control Funding Formula (LCFF) transportation related add-on funding.

Education Code 41850.1

41850.1.

(a) (1) Commencing with the 2022–23 fiscal year and for each fiscal year thereafter, the Superintendent shall apportion to each school district and county superintendent of schools that provides pupil transportation services, a transportation allowance equal to 60 percent of the home-to-school transportation expenditures reported by the school district or county superintendent of schools, as determined by its Function 3600 entry in the Standardized Account Code Structure (SACS) report, consistent with the definition in the California School Accounting Manual, for the prior year, excluding capital outlay and nonagency expenditures.

Education Code 39800.1

39800.1.

(a) As a condition of receiving apportionments under Section 41850.1, a local educational agency shall develop a plan describing the transportation services it will offer to its pupils, and how it will prioritize planned transportation services for pupils in transitional kindergarten, kindergarten, and any of grades 1 to 6, inclusive, and pupils who are low income. The plan shall be adopted by the local educational agency's governing board on or before April 1, 2023, and updated by April 1 each year thereafter.

OUSD's Reimbursement Profile

- The District is eligible for the Home to School Transportation Reimbursement and is projected to receive \$3,468,152 in 2024-25
- The District currently spends \$16,040,000 (Sped Transportation \$15,060,000 / AC Transit Supplemental Service \$500,000 / Sped Parent Reimbursement \$450,000 / Sped Bus Passes-Bart Tickets \$150,000)
- The District will prepare its Transportation plan for the ensuing years as part of its' Budget Adoption Process and submit it with its Second Interim Report in March annually.



OUSD Current Transportation Services

OUSD Student Transportation Services

- We Serve...
 - General Education Students
 - Grades TK-5 - No Transportation Services Provided
 - Grades 6 - 12 - District Partners with the Alameda County Transportation Commission and AC Transit
 - Currently serving 3,335 students on AC Transit (2,135 students on supplemental lines and 1,200 students on local lines annually.
(Supplemental service lines 617, 638, 642, 646, 648, 649, 650, 651, 652, 653, 654, 655, 657, 658, 660, 662, 677, 680, 688, 696 specific to sites: Skyline, Oakland Tech, Oakland High, Montera, Edna Brewer, Bret Harte)
 - OUSD investment \$500K

OUSD Student Transportation Services

- We Serve...Special Education Cont;
 - Special Education Students with Transportation services included in their Individualized Education Plans (IEP) with curb to curb transportation services, unless otherwise designated (door to door).
 - Currently service 1,627 students across 99 sites (CDC, K-12, Young Adult -77 sites & Non Public School/NPS- 22 sites)
 - Operating 226 routes (CDC, K-12, Young Adult routes- 175 routes & NPS- 51 routes) avg 10.91 miles 54 min avg ride time
 - Average 10.91 miles and average 54 min ride time (CDC, K-12, Young Adult routes)
 - Average 62.9 miles and average 74.6 avg ride time (Non Public School /NPS)

OUSD Student Transportation Services

- \$14,500,000 budget for Special Education Transportation Avg \$8912 per student.
- Miles Traveled: 1,280,100 (OUSD sites via Zum 637,500 / NPS sites via other vendors: RIDS, FA, JIR, BAWT 642.600)
- In the 2024-25 School Year, OUSD will operate the first in the nation 100% electric bus fleet (80+) with ZUM.
 - Buses funded by \$26.5M in Federal Grants awarded to ZUM.
 - OUSD has also been the recipient of Bus Grant Awards.
 - Buses are quieter (no engine), no fumes (no diesel), and enhanced technology upgraded with GPS tracking for OUSD and Parents via a ZUM App.

OUSD Student Transportation Services

Non Public School Sites and Location

- Bayhill- Berkeley
- Anova- Concord
- Catalyst- El Sobrante
- Seneca Pathfinder- Union City
- CEID- Berkeley
- CSD Deaf- Fremont
- CSB Blind-Fremont
- Fred Finch- Oakland
- JBA- San Leandro
- Dublin Behavioral Center- Dublin
- Maya Angelou- Oakland
- Phillips Academy- Alameda
- Spectrum Cambridge- Oakland
- Spectrum Delta- Pittsburgh
- Spectrum Tara Hills- San Pablo
- Tilden Prep- Walnut Creek
- WCC- Redwood City
- Wellsprings- Walnut Creek
- Oak Hill- San Anselmo
- Irene Hunt- San Anselmo
- Sumna Academy- Pleasanton
- Springstone- Lafayette

Grades	# of Students
CDC	153
K-5th	346
6-8th	186
9-12th	155
YAP	85

# of Students	Mileage Range (HTS)
57	.1-1 mile
153	1.1 - 2 miles
344	2.1 - 4.9 miles
242	5 - 9.9 miles
56	10-13.5 miles

****OPPORTUNITY:**

57 students less than 1 mile = neighborhood school


56 students 10-13.5 miles = passing multiple other sites and longer ride times

OUSD Student Transportation Services

- We ALSO Serve...
 - Unhoused students as defined by McKinney-Vento Homeless Assistance Act
 - All Athletic Logistic Needs and Field Trips
 - 2022-2023 ~313 requisitions
 - \$764,262.82 total cost
 - Summer programs for students requiring transportation
- We ALSO Manage...
 - OakDot- Traffic enforcement/ curb/ ADA/ signs etc any coordination between Oakdot and sites for any street reason- crossing guard programs and Safety Patrol programs
 - AC Transit coordination of bell times and lines, issues on buses with OUSD sites
 - Student Transit Pass coordination w/ ACTC
 - Secondary, eligible Special Education Students
- We DO all this, with a staff of 3 FTE...

OUSD Student Transportation Services

- We Earn...
 - \$6.2M in LCFF Funding
 - Modified in 2023-24, where funding was set at \$5.7M since 2012-13
 - The UnRestricted General Fund Contributes \$10.3M
 - This reimbursement will offset the General Fund's contribution by \$3.4M Annually
 - This reimbursement will support some one time and ongoing investments that Base General Fund did not always have to available to support.
 - Revenue does not increase based on changes in routes nor increased student capacity.



Education Code 39800.1 Transportation Services Plan Requirements

Education Code 39800.1 Requirements

- Describe services the plan will offer students
 - The District will continue to offer services to students as summarized in General Ed, Special Education, Unhoused Students, Extended Year, and Summer Programs in the 2024-25 fiscal year.
- Describe how the plan will prioritize the following pupils
 - Transitional Kindergarten (TK)
 - Kindergarten
 - Grades 1-6
 - Unduplicated Pupils (foster youth, disadvantaged student, and multi-language learners)
- Plan must include services that come at no cost to pupils
 - Existing and all planned programs are at no cost to pupils

Recommendation

It is recommended that the Board receive for First Read the OUSD Transportation information and plan to support the District's eligibility to meet the requirements for reimbursement of funding, per AB 181.

- Additional engagement to occur at the Budget and Finance Meeting of March 14, 2024
- Second Read and Adoption March 27, 2024

Thank you

For more information, please reach out to:

Kimberly.Raney@ousd.org

Balances through June **Fiscal Year 2023/24**

Object	Description	Adopted Budget	Revised Budget	Revenue	Account Balance
Fund 010 - General Fd					
8011	LCFF State Aid-Current Yr	6,190,401.00	6,195,554.00	6,195,554.00	.00
8980	Contributions From Unrestricted	10,230,212.00	10,225,059.00		10,225,059.00
Total for Revenue accounts		16,420,613.00	16,420,613.00	6,195,554.00	10,225,059.00

Object	Description	Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance
2305	Supv&adm Salaries	113,861.00	113,861.00	38,576.24	75,308.32	23.56-
2450	Clerical Substitutes	16,614.00	16,614.00		28,430.72	11,816.72-
3202	PERS Classified	34,811.00	34,811.00	10,292.16	20,092.28	4,426.56
3302	Social Security Classified	8,089.00	8,089.00	2,391.72	4,669.12	1,028.16
3322	Medicare Classified	1,892.00	1,892.00	559.36	1,386.13	53.49-
3342	PARS Classified				305.43	305.43-
3402	Health & Welfare Classified	22,177.00	22,177.00	7,340.08	14,680.16	156.76
3502	St Unemploy Ins Classified	652.00	652.00	19.28	47.76	584.96
3504	SUI-LEC Charge Class	83.00	83.00			83.00
3602	Workers Comp Classified	4,684.00	4,684.00	1,384.88	3,724.23	425.11-
4310	Materials and Supplies	1,000.00	1,000.00	15,000.00	3,631.41	17,631.41-
4311	Meeting Refreshments				185.59	185.59-
5200	Travel And Conferences	1,000.00	1,000.00			1,000.00
5820	Bart & Bus Passes	333,000.00	333,000.00	1,832.00	96,168.00	235,000.00
5830	Contracted Services	3,587,750.00	3,587,750.00	637,253.77	2,947,278.23	3,218.00
5865	Pymts To Parents In Lieu Of	450,000.00	450,000.00		248,305.00	201,695.00
5880	Transportation-contracted	11,845,000.00	11,845,000.00	5,553,023.64	6,446,976.36	155,000.00-
Total for Expense accounts		16,420,613.00	16,420,613.00	6,267,673.13	9,891,188.74	261,751.13

Total for Org 030 and Fund 010					
	<u>Starting Balance</u>	<u>+ Revenues</u>	<u>- Encumbrances</u>	<u>- Expenditures</u>	<u>= Calculated Ending Balance</u>
Budgeted		16,420,613.00		16,420,613.00	0.00
Actual		6,195,554.00	6,267,673.13	9,891,188.74	9,963,307.87-