

Students First Budget Rebalancing Proposal

Presented by the Sacramento City Teachers Association (SCTA)

December 13, 2018

In 2017-18, the Sacramento City Unified School District adopted Original, First Interim and Second Interim Budgets with Positive Certification, with the concurrence of the Sacramento County Office of Education. The approval of the 2017-18 Second Interim Budget in March 2018 with SCOE concurrence, occurred after the conclusion of contract negotiations with all unions that represent Sac City district employees, including the Sacramento City Teachers Association (SCTA).

In June 2018, the District submitted its Original 2018-19 budget. On August 28, 2018, the Sacramento County Office of Education (SCOE) rejected the Sacramento City Unified School District (SCUSD) Budget. On October 11, SCOE rejected a second, revised budget. On December 6, 2018, the SCUSD submitted a third, revised budget with a Negative Certification, which means the District “will be unable to meet its financial obligations for the remainder of the fiscal year or the subsequent fiscal year.”

We continue to believe that lawmakers at the state and federal level must do more to make education a higher priority, particularly here in California. We further believe that election of Gavin Newsom as governor together with projections of large state budget surpluses will likely mean increased funding for schools in 2019-20 and beyond.

The crisis here in Sac City, however, is more about imprudent fiscal oversight and misplaced priorities than about a lack of revenue. According to audited financial statements, general fund revenue \$405 million in 2014; in 2018, revenue grew to more than \$505 million. Despite this increased funding, and unlike surrounding districts, Sac City’s finances took a dramatic downturn from March 2018 to August 2018. For example, last year only four out of nearly 1100 school districts in the entire state of California submitted budgets with a Negative Certification. We are aware of no district, other than Sac City, that had its budget outright rejected by a county of office education.

As educators, parents and community leaders we believe it our responsibility to put forth potential solutions to the Sac City budget fiasco.

According to presentations by Chief Business Officer John Quinto, Superintendent Jorge Aguilar, and Board President Jessie Ryan, reductions of \$16 million will “balance the budget.”

Using \$16 million as the target number, therefore, this proposal is intended not just to address the current budget fiasco but, more importantly, to restructure Sac City’s spending priorities to guarantee that our District truly puts students first.

We also believe, however, that the long-term solution in Sac City will not be found by simple austerity measures, that is, cutting our way to a solution. Spending choices must reflect a renewed commitment our classrooms and to making Sac City the Destination District for California. Here’s our proposal for how we might accomplish that:

Savings

	Savings
1. Reduce Central Office Administrators to 2014 level ⁱ	\$16,000,000
2. Reduce Admin Pay to more reasonable level ⁱⁱ	\$600,000
3. Eliminate vacation buyout for admin and others ⁱⁱⁱ	\$6,000,000
4. Reduce use of outside attorneys for labor relations ^{iv}	\$1,200,000
5. Redirect Retiree Health Insurance Overpayment ^v	\$12,500,000
6. Change to Less Costly Health Plans according to Article 13.1 ^{vi}	\$16,000,000
7. Redirect Equity Department & Admin to Site-based Restorative Practices ^{vii}	\$1,500,000
8. Terminate contract with CORE ^{viii}	\$200,000
9. Terminate third-party subcontracts for language, speech, hearing, nursing and others and restore as District positions ^{ix}	\$4,200,000
TOTAL SAVINGS	\$60,000,000

These savings generate substantially more resources than the \$16 million amount identified to achieve financial solvency.

Students First Priorities

With this savings, the following priorities can be addressed:

1. Balance Budget	\$16,000,000
2. Reinstate Extended Summer Learning Program	\$2,500,000
3. Fund Elementary Flag Football, Basketball and STRIDES Running Program	\$1,500,000
4. Reduce Class Size, Increase Staffing of Professional Support Staff consistent with Article 13.1 of the SCTA/SCUSD contract,	\$16,000,000
5. Implement Restorative Practices (include professional development for all teachers)	\$3,000,000
6. Introduce arts and music classes in all elementary schools	\$1,400,000
7. Retention of current staffing levels of classified staff	Budget neutral
Total Expenditures	\$40,400,000

This leaves an additional reserve of \$19,600,000.

The Educational (And Financial) Benefits of Our Students First Proposal

By refocusing District priorities away from the Serna Center and back into the classroom is both directly beneficial to enhancing students' learning environment, and it is likely to have a positive affect on the District's financial position.

Special Education: For example, by using savings from healthcare savings to lower class sizes, and increase additional professional staff, the District in cooperation with the Association

can implement a robust intervention program that will ensure that those students are struggling receive the intervention services they need, while at the same time reducing the number of students who may be overidentified as special education. Sac City has a higher proportion of students in special education than both state and federal averages, which harms students and adds greater costs to the District. By implementing a robust intervention program, students get the services they need, while the District resources are used where they are appropriate and needed.

Restorative Practices: Another example is investing in restorative practices, a comprehensive program of behavioral intervention (with much-needed culturally-sensitive, trauma-informed professional development) which encourages cooperation and social and emotional learning over punitive disciplinary measures which have disproportionately impacted African-American students. Keeping students in the classroom is not only sound for student outcomes, but it also will improve the District's finances by maintaining a high Average Daily Attendance (ADA) which drives reimbursement from the state.

Looking Ahead to 2020

In addition, the parties reiterate their commitment to work with Mayor Steinberg "to sponsor a 2020 ballot initiative that will enable the District to provide arts and music, restorative practices and other enhancements designed to enrich students' academic and cultural experiences, including summer school programs, to encourage students to stay in school to give all students the opportunity to graduate with the greatest number of post-secondary choices from the widest array of options."

ⁱ The District increased the number of administrators from 166 in 2013-14 to 267 currently. We are proposing the 190 number from 2014-15. See attachment A.

ⁱⁱ The Superintendent is currently paid 61% more than the governor of California. See attachment B.

ⁱⁱⁱ CBO John Quinto reported the District paid out \$6 million in 2017-18 for the vacation buyout for administrators and other selected employees, payouts that are scheduled to continue "over a period of not more than 5 years." The agreement was negotiated with the administrators' union, United Professional Employees, and a similar benefit was extended to non-represented management. See attachment C.

^{iv} The District increased this line item in its budget \$1.2 million in its First Interim Budget (October 2018) over its Original Budget of 2018-19 (July 2018). See attachment D.

^v See attachment E.

^{vi} See attachment F.

^{vii} See attachment G.

^{viii} See attachment H.

^{ix} See, for example, attachment I.

Attachment "A"

S8C. Cost Analysis of District's Labor Agreements - Management/Supervisor/Confidential Employees

DATA ENTRY: Enter all applicable data items; there are no extractions in this section.

	Prior Year (2nd Interim) (2012-13)	Budget Year (2013-14)	1st Subsequent Year (2014-15)	2nd Subsequent Year (2015-16)
Number of management, supervisor, and confidential FTE positions	173.0	166.0	166.0	166.0

**Management/Supervisor/Confidential
Salary and Benefit Negotiations**

1. Are salary and benefit negotiations settled for the budget year?

Yes

If Yes, complete question 2.

If No, identify the unsettled negotiations including any prior year unsettled negotiations and then complete questions 3 and 4.

If n/a, skip the remainder of Section S8C.

Negotiations Settled

2. Salary settlement:

Is the cost of salary settlement included in the budget and multiyear projections (MYPs)?

Total cost of salary settlement

% change in salary schedule from prior year
(may enter text, such as "Reopener")

Budget Year (2013-14)	1st Subsequent Year (2014-15)	2nd Subsequent Year (2015-16)
Yes	Yes	Yes
0	0	0
No change	No change	No change

Negotiations Not Settled

3. Cost of a one percent increase in salary and statutory benefits

4. Amount included for any tentative salary schedule increases

Budget Year (2013-14)	1st Subsequent Year (2014-15)	2nd Subsequent Year (2015-16)
0	0	0

**Management/Supervisor/Confidential
Health and Welfare (H&W) Benefits**

- Are costs of H&W benefit changes included in the budget and MYPs?
- Total cost of H&W benefits
- Percent of H&W cost paid by employer
- Percent projected change in H&W cost over prior year

Budget Year (2013-14)	1st Subsequent Year (2014-15)	2nd Subsequent Year (2015-16)
Yes	Yes	Yes
548,573	685,573	754,130
75.0%	100.0%	100.0%
100.0%	10.0%	10.0%

**Management/Supervisor/Confidential
Step and Column Adjustments**

- Are step & column adjustments included in the budget and MYPs?
- Cost of step and column adjustments
- Percent change in step & column over prior year

Budget Year (2013-14)	1st Subsequent Year (2014-15)	2nd Subsequent Year (2015-16)
Yes	Yes	Yes

**Management/Supervisor/Confidential
Other Benefits (mileage, bonuses, etc.)**

- Are costs of other benefits included in the budget and MYPs?
- Total cost of other benefits
- Percent change in cost of other benefits over prior year

Budget Year (2013-14)	1st Subsequent Year (2014-15)	2nd Subsequent Year (2015-16)
Yes	Yes	Yes

S8C. Cost Analysis of District's Labor Agreements - Management/Supervisor/Confidential Employees

DATA ENTRY: Enter all applicable data items; there are no extractions in this section.

	Prior Year (2nd Interim) (2013-14)	Budget Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Number of management, supervisor, and confidential FTE positions	166.0	165.0	166.0	166.0

**Management/Supervisor/Confidential
Salary and Benefit Negotiations**

1. Are salary and benefit negotiations settled for the budget year?

No

If Yes, complete question 2.

If No, identify the unsettled negotiations including any prior year unsettled negotiations and then complete questions 3 and 4.

The contract with management employees (Principals) ends on June 30, 2014. An agreement has not been reached yet for FY 2014-15 and outlying years. Classified management employees do not have a bargaining unit.

If n/a, skip the remainder of Section S8C.

Negotiations Settled

2. Salary settlement:

Is the cost of salary settlement included in the budget and multiyear projections (MYPs)?

Total cost of salary settlement

% change in salary schedule from prior year
(may enter text, such as "Reopener")

Budget Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
No	No	No
0	0	0
No change	No change	No change

Negotiations Not Settled

3. Cost of a one percent increase in salary and statutory benefits

111,426

4. Amount included for any tentative salary schedule increases

Budget Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
0	0	0

**Management/Supervisor/Confidential
Health and Welfare (H&W) Benefits**

1. Are costs of H&W benefit changes included in the budget and MYPs?
2. Total cost of H&W benefits
3. Percent of H&W cost paid by employer
4. Percent projected change in H&W cost over prior year

Budget Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Yes	Yes	Yes
870,530	957,583	1,053,341
100.0%	100.0%	100.0%
10.0%	10.0%	10.0%

**Management/Supervisor/Confidential
Step and Column Adjustments**

1. Are step & column adjustments included in the budget and MYPs?
2. Cost of step and column adjustments
3. Percent change in step & column over prior year

Budget Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Yes	Yes	Yes
0	0	0
0.0%	0.0%	0.0%

**Management/Supervisor/Confidential
Other Benefits (mileage, bonuses, etc.)**

1. Are costs of other benefits included in the budget and MYPs?
2. Total cost of other benefits
3. Percent change in cost of other benefits over prior year

Budget Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Yes	Yes	Yes
43,200	43,200	43,200
0.0%	0.0%	0.0%

S8C. Cost Analysis of District's Labor Agreements - Management/Supervisor/Confidential Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period

Were all managerial/confidential labor negotiations settled as of budget adoption?

No

If Yes or n/a, complete number of FTEs, then skip to S9.

If No, continue with section S8C

Management/Supervisor/Confidential Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2013-14)	Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Number of management, supervisor, and confidential FTE positions	204.0	190.0	190.0	190.0

1a Have any salary and benefit negotiations been settled since budget adoption?

If Yes, complete question 2.

If No, complete questions 3 and 4.

Yes

1b Are any salary and benefit negotiations still unsettled?

If Yes, complete questions 3 and 4.

No

Negotiations Settled Since Budget Adoption

2. Salary settlement:

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

Total cost of salary settlement

Change in salary schedule from prior year
(may enter text, such as "Reopener")

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Yes	Yes	Yes
228,302	114,151	0
2.0%	1.0%	N/A

Negotiations Not Settled

3. Cost of a one percent increase in salary and statutory benefits

4. Amount included for any tentative salary schedule increases

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

Management/Supervisor/Confidential Health and Welfare (H&W) Benefits

- Are costs of H&W benefit changes included in the interim and MYPs?
- Total cost of H&W benefits
- Percent of H&W cost paid by employer
- Percent projected change in H&W cost over prior year

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Yes	Yes	Yes

Management/Supervisor/Confidential Step and Column Adjustments

- Are step & column adjustments included in the budget and MYPs?
- Cost of step & column adjustments
- Percent change in step and column over prior year

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

Management/Supervisor/Confidential Other Benefits (milloage, bonuses, etc.)

- Are costs of other benefits included in the interim and MYPs?
- Total cost of other benefits
- Percent change in cost of other benefits over prior year

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

S8C. Cost Analysis of District's Labor Agreements - Management/Supervisor/Confidential Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period

Were all managerial/confidential labor negotiations settled as of first interim projections?

Yes

If Yes or n/a, complete number of FTEs, then skip to S9.

If No, continue with section S8C.

Management/Supervisor/Confidential Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2013-14)	Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)
Number of management, supervisor, and confidential FTE positions	204.0	190.0	190.0	190.0

1a. Have any salary and benefit negotiations been settled since first interim projections?

If Yes, complete question 2.

If No, complete questions 3 and 4.

n/a

1b. Are any salary and benefit negotiations still unsettled?

If Yes, complete questions 3 and 4.

No

Negotiations Settled Since First Interim Projections

2. Salary settlement:

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

Total cost of salary settlement

Change in salary schedule from prior year
(may enter text, such as "Reopener")

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

Negotiations Not Settled

3. Cost of a one percent increase in salary and statutory benefits

4. Amount included for any tentative salary schedule increases

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

**Management/Supervisor/Confidential
Health and Welfare (H&W) Benefits**

- Are costs of H&W benefit changes included in the interim and MYPs?
- Total cost of H&W benefits
- Percent of H&W cost paid by employer
- Percent projected change in H&W cost over prior year

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

**Management/Supervisor/Confidential
Step and Column Adjustments**

- Are step & column adjustments included in the budget and MYPs?
- Cost of step & column adjustments
- Percent change in step and column over prior year

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

**Management/Supervisor/Confidential
Other Benefits (mileage, bonuses, etc.)**

- Are costs of other benefits included in the interim and MYPs?
- Total cost of other benefits
- Percent change in cost of other benefits over prior year

Current Year (2014-15)	1st Subsequent Year (2015-16)	2nd Subsequent Year (2016-17)

S8C. Cost Analysis of District's Labor Agreements - Management/Supervisor/Confidential Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period

Were all managerial/confidential labor negotiations settled as of budget adoption?

Yes

If Yes or n/a, complete number of FTEs, then skip to S9.

If No, continue with section S8C.

Management/Supervisor/Confidential Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2017-18)	Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)
Number of management, supervisor, and confidential FTE positions	269.8	268.0	268.0	268.0

1a. Have any salary and benefit negotiations been settled since budget adoption?

If Yes, complete question 2.

If No, complete questions 3 and 4.

n/a

1b. Are any salary and benefit negotiations still unsettled?

If Yes, complete questions 3 and 4.

No

Negotiations Settled Since Budget Adoption

2. Salary settlement:

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

Total cost of salary settlement

Change in salary schedule from prior year
(may enter text, such as "Reopener")

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

Negotiations Not Settled

3. Cost of a one percent increase in salary and statutory benefits

4. Amount included for any tentative salary schedule increases

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

**Management/Supervisor/Confidential
Health and Welfare (H&W) Benefits**

- Are costs of H&W benefit changes included in the interim and MYPs?
- Total cost of H&W benefits
- Percent of H&W cost paid by employer
- Percent projected change in H&W cost over prior year

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

**Management/Supervisor/Confidential
Step and Column Adjustments**

- Are step & column adjustments included in the interim and MYPs?
- Cost of step & column adjustments
- Percent change in step and column over prior year

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

**Management/Supervisor/Confidential
Other Benefits (mileage, bonuses, etc.)**

- Are costs of other benefits included in the interim and MYPs?
- Total cost of other benefits
- Percent change in cost of other benefits over prior year

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

Classified (Non-management) Health and Welfare (H&W) Benefits

1. Are costs of H&W benefit changes included in the interim and MYPs?
2. Total cost of H&W benefits
3. Percent of H&W cost paid by employer
4. Percent projected change in H&W cost over prior year

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

Classified (Non-management) Prior Year Settlements Negotiated Since Budget Adoption

Are any new costs negotiated since budget adoption for prior year settlements included in the interim?

If Yes, amount of new costs included in the interim and MYPs
If Yes, explain the nature of the new costs:

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Classified (Non-management) Step and Column Adjustments

1. Are step & column adjustments included in the interim and MYPs?
2. Cost of step & column adjustments
3. Percent change in step & column over prior year

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

Classified (Non-management) Attrition (layoffs and retirements)

1. Are savings from attrition included in the interim and MYPs?
2. Are additional H&W benefits for those laid-off or retired employees included in the interim and MYPs?

Current Year (2018-19)	1st Subsequent Year (2019-20)	2nd Subsequent Year (2020-21)

Classified (Non-management) - Other

List other significant contract changes that have occurred since budget adoption and the cost impact of each (i.e., hours of employment, leave of absence, bonuses, etc.):

Attachement "B"

Fiscal16a

Account Component Summary-Balance

Balances through September

Fiscal Year 2018/19

Object	Description	Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance
1101	Teacher Salary-Regular	159,767,043.00	157,922,342.74		16,358,228.17	141,564,114.57
1102	Teacher Salary-Substitute	4,457,561.00	4,437,561.00		33,738.79	4,403,822.21
1103	Teacher Salary-Temporary	5,552,739.00	5,786,866.00		1,517,789.59	4,269,076.41
1201	Librarian Salary-Regular	1,117,047.00	1,117,069.50		95,606.76	1,021,462.74
1211	Guidance/Welfare/Attnld Sal-Reg	6,212,104.00	6,253,219.70		618,079.03	5,635,140.67
1221	Physical/Mental Health Salary-	5,431,621.00	5,425,163.18		582,994.12	4,842,169.06
1223	Physical/Mental Health Salary-	79,147.57	79,147.57		43,014.77	36,132.80
1301	Supervisor Salary-Regular	394,860.00	394,860.00		119,778.86	275,081.14
1311	Principal Salary-Regular	9,137,492.00	9,137,492.00		1,755,436.67	7,382,055.33
1312	Principal Salary-Substitute				16,546.21	16,546.21-
1313	Principal Salary-Temporary	289,571.00	289,571.00		323,500.00	33,929.00-
1321	Vice Principal Salary-Regular	4,556,826.00	4,556,826.00		771,861.38	3,784,964.62
1331	Superintendent Salary-Regular	319,233.00	319,233.00		76,000.02	243,232.98
1341	Certificated Administrative Sa	7,028,939.00	7,219,335.99		1,545,778.31	5,673,557.68
1343	Certificated Administrative Sa		5,000.00		8,224.40	3,224.40-
1901	Other Certificated Salary-Regu	10,249,587.00	10,268,747.00		780,787.58	9,487,959.42
1903	Other Certificated Salary-Temp	2,499,828.00	2,563,729.16		524,080.35	2,039,648.81
2101	Instructional Aide Salary-Regu	11,265,698.00	10,885,199.39		925,265.85	9,959,933.54
2102	Instructional Aide Salary-Subs	18,351.00	18,351.00		1,419.70	16,931.30
2103	Instructional Aide Salary-Temp	502,185.00	592,657.00		228,423.07	364,233.93
2203	Nutrition Services Salary-Temp				358.23	358.23-
2211	Maintenance Salary-Regular	6,749,345.00	6,749,345.00		1,609,684.55	5,139,660.45
2213	Maintenance Salary-Temporary	15,024.46	15,024.46			15,024.46
2214	Maintenance Salary-Overtime	16,338.00	16,338.00		3,097.02	13,240.98
2221	Operations Salary-Regular	8,250,319.00	8,250,319.00		1,998,898.48	6,251,420.52
2222	Operations Salary-Substitute	230,798.00	230,798.00		77,445.80	153,352.20
2223	Operations Salary-Temporary	184,818.00	187,186.78		85,368.10	101,818.68
2224	Operations Salary-Overtime	1,920.00	3,362.00		45,533.21	42,171.21-
2231	Transportation Salary-Regular	5,691,542.00	5,709,065.00		595,397.57	5,113,667.43
2232	Transportation Salary-Substitu				449.76	449.76-
2233	Transportation Salary-Temporar	487,066.00	487,066.00		227,909.64	259,156.36
2234	Transportation Salary-Overtime				16,009.68	16,009.68-
2241	Inst'l Media/Library Salary-Re	510,176.00	510,176.00		68,299.17	441,876.83
2243	Inst'l Media/Library Salary-Te	12,961.00	14,757.00			14,757.00
2251	Other Clsfd Support Salary-Reg	2,947,509.00	2,947,509.00		361,064.61	2,586,444.39

Selection

 Filtered by User Permissions, (Org = 97, Online/Offline = N, Fiscal Year = 2019, Period = 3, Unposted JEs? = N, Assets and Liabilities? = N,
 Restricted Accts? = Y, SACS? = N, Fund = 01, Object = 0000-9999, Resource = 0000-9999, Goal = 0000-9999, Function = 0000-9999, Location
 = 0000-

ESC / PE

ONLINE

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Attachment "C"

TENTATIVE AGREEMENT

between the

SACRAMENTO CITY UNIFIED SCHOOL DISTRICT

and the

UNITED PROFESSIONAL EDUCATORS (UPE)

August 3, 2017

The Sacramento City Unified School District (District) and the United Professional Educators (UPE), collectively referred to as "the Parties," have considered their mutual interests and have agreed to enter into this Tentative Agreement (Agreement) to completely resolve negotiations for the 2016-17 school year.

1. Tentative Agreements. The agreements reached by the Parties during negotiations are reflected in Attachment A. This Tentative Agreement incorporates Attachment A hereto and the Parties agree to revise the current Collective Bargaining Agreement (CBA) between the Parties to reflect the changes shown in Attachment A, as well as any other agreements reached in prior years which have not yet been incorporated into the agreement.
2. Conclusion of Negotiations. This Agreement will conclude negotiations for the 2016-17 and 2017-18 school years with no reopeners in those years. The Parties agree to make the necessary changes to Article 10 (Term of Agreement) provision of the CBA to reflect the term of the agreement from July 1, 2016 to June 30, 2019. The Parties agree that they may reopen up to two articles of their choice for the 2018-19 school year consistent with Article 10.
3. Effective Date. The Agreement shall become effective upon approval by UPE and the District, as evidenced by the signature of the UPE and District designees and by ratification of the UPE unit members and the District Board of Education.
4. Retroactive Payments. Any retroactive payments owed to unit members pursuant to this agreement will be paid within sixty (60) days of the final ratification and approval of this Agreement.
5. Technical Changes. The Parties agree to work together to review the Index and Appendix and make any necessary changes to the CBA, Index and Appendix to reflect agreements, including updating cross references and "Commonly Used Forms", and modifying the salary schedules.

6. Changes in CBA. With the exception of the changes referenced in this Agreement, all other CBA language, in the 2005-2008 Agreement and as modified through subsequent tentative agreements, will remain status quo.

Nudy Montgomery 8/3/17
K. L. Phan 8/3/17

W. Daniel McLeod 8/3/17

Andy Hollander 8/3/17

GAH 8.3.17

Kelly Dunkley 8-3-17

Richard D. 8/4/17

8/3/17

8/3/17

8-3-17

8/3/17

8/3/17

ATTACHMENT A

Article 7 Salary

Paragraphs 2 and 3 of Article 7 will be deleted in their entirety and replaced with the following:

2. Employee Compensation and Health Benefits

2.1 Salary

2.1.1 Retroactive to the start of the 2016-17 school year, employees will be compensated pursuant to the applicable salary schedule in Appendix __. [The agreed upon salary schedule is attached to this agreement as Attachment B]

2.1.2 Salary Placement of Current UPE Members

2.1.2.1 Beginning with the 2016-17 school year, current UPE members will be placed on salary schedule according to number of years the member has as an administrator in the district or remain at their current step on the pay schedule, whichever results in the greater salary.

[Negotiations note: There will be no change to the current priority school salary schedule]

2.1.3 Longevity Steps

Commencing with the 2017-18 school year, UPE members will be eligible for longevity steps at the following years as reflected on the salary schedule attached hereto:

- o 13 – 1% of employee's base salary
- o 16 – 2% of employee's base salary
- o 19 – 3% of employee's base salary
- o 22 – 4% of employee's base salary
- o 25 – 6% of employee's base salary

2.1.4 Doctoral Stipend

Commencing with the 2017-18 school year, UPE members who possess a doctorate degree will be paid an annual stipend in the amount of \$3,000.

2.2 Health and Welfare Benefits

2.2.1 Commencing with the 2017-18 school year, the District will contribute the following toward health and welfare benefits to UPE Members:

Employee only: 100% coverage of the Kaiser Employee Only Health Plan
rate

Family: 80% coverage up to the Kaiser Family Plan rate

2.3 UPE Member Contributions to Post Employment Retirement Benefits

2.3.1 Commencing with the 2017-18 school year, UPE members will pay \$200/year toward the cost of post-employment retirement benefits, which payment will be deducted in equal amounts from each of the member's pay checks.

2.3.2 Commencing with the 2018-19 school year, UPE members will pay \$350/year toward the cost of post-employment retirement benefits, which payment will be deducted in equal amounts from each of the member's pay checks.

2.3.3 Commencing with the 2019-20 school year, UPE members will pay \$500/year toward the cost of post-employment retirement benefits, which payment will be deducted in equal amounts from each of the member's pay checks.

Article 8 Work Year

1. Unit members employed as of June 30, 2017 on a twelve (12) month work calendar (also known as "A Calendar Employees") will continue to work 223 days a year for the 2017-18 school year and thereafter, with up to five (5) days available for such members to take as vacation days with pay. Vacation days not used will be paid out at the end of the fiscal year. Vacation days shall not be accrued from year to year. All unit members, employed as of June 30, 2017, shall be placed on the "A Calendar" if they transfer to a twelve (12) month UPE position at a later date.
2. Unit members employed on or after July 1, 2017 on a twelve (12) month work calendar (also known as "A1 Calendar Employees") will work 223 days a year for the 2017-18 school year and thereafter with no vacation days.
3. Payout of accrued vacation to UPE members:
 - o Payout of currently accrued vacation shall be paid in full over a period of not more than 5 years
 - o Current employees on a 223 day schedule will receive a one-time 3% bonus, spread over three years
2. The District and UPE agree to work together to update Article 8 of the CBA to reflect the work year of UPE members as agreed to during negotiations and reflected below:
 - UPE members will work the designated contracted number of days set forth below. Identification of work days will be determined by agreement with direct supervisor.
 - o Elementary and Middle School Principals will work a 211 day schedule

- Middle School and High School Assistant Principals will work a 211 day schedule
- Elementary School Assistant Principals will work a 202 day schedule
- Dean, Secondary will work a 201 day schedule

Article 3 Organizational Rights and Security

The parties agree to amend paragraph 1 of Article 3 to read as follows:

- h. Personnel file
 - i. The personnel file of each UPE member shall be maintained at the District Office in the Human Resources Department.
 - ii. Information of a derogatory nature shall not be entered into the personnel file of a unit member unless and until the unit member is given written notice and an opportunity to review and comment on the information. The unit member shall have the right to enter, and have attached to any derogatory statement, his or her own comments.
 - iii. Any unit member may inspect their personnel file by contacting the District's Human Resources Department and scheduling a time for review during regular business hours. Unit members do not have the right to inspect personnel records during a time in which they are actually required to render services to the District.
- i. Unit Member Transfers. The District reserves the right to transfer employees when it is in the District's best interest to do so. Employees who are transferred may request an explanation of the reason for the transfer. Upon such request, the District will provide a response. Such transfers shall not be for arbitrary or capricious reasons.

Article 6 Leaves of Absence

The parties agree to add a new section to Article 6 to provide for catastrophic leave for unit members.

Other Issues

1. The parties agree to work together during the 2017-18 school year to make modifications to Article 5, Evaluation, and related evaluation forms.
2. The parties agree to work together during the 2017-18 school year to determine whether any language should be added to the CBA related to UPE unit member safety.

Attachment "D"

Fiscal16a

Account Component Summary-Balance

Balances through November

Location		Description	Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance
Fund 01 - General (continued)							
0704		COMMUNICATIONS	940,118.00	769,798.09	20,138.58	282,442.49	467,217.02
0705		EMPLOYEE RELATIONS	39,897.00	39,897.00	14,229.01	5,865.49	19,802.50
0708		INTEGRATED SERVICES	1,732,070.00	2,150,121.62	58,266.48	618,009.01	1,473,846.13
0710		CONSTITUENT SERVICES	329,186.00	267,267.00	255.00	96,863.40	170,148.60
0712		AREA ASSISTANT SUPERIN -WEST	444,896.00	457,578.62	74,230.71	185,196.34	198,151.57
0713		ADULTVOC ED	230,000.00	230,000.00			230,000.00
0714		AREA ASSISTANT SUPERINTENDENT	272,351.00	216,737.00	1,415.27	50,977.05	164,344.68
0715		CHILDREN'S CEN	2,345,207.00	2,345,207.00			2,345,207.00
0716		AREA ASSISTANT SUPERIN-CENTRAL	264,593.00	267,511.00	3,043.41	108,588.47	155,879.12
0717		LEGAL COUNSEL	1,784,490.00	2,914,768.24	969,663.17	1,208,742.19	736,382.88
0720		AREA ASSITANT SUPERIN-EAST	384,698.00	387,994.64	7,102.00	163,508.99	217,383.65
0721		CHIEF ACADEMIC OFFICER	2,521,026.00	3,456,031.68	34,134.84	640,006.78	2,781,890.06
0723		DEPUTY SUPERINTENDENT	5,029,754.00	1,126,932.51	73,900.25	431,503.03	621,529.23
0724		MUSIC SECTION	709,369.00	755,914.44	64,132.43	185,955.98	505,826.03
0725		STATE AND FEDERAL PROGRAMS	1,228,096.00	1,250,659.63	2,322.49	147,459.40	1,100,877.74
0726		INSTRUCT MATERIALS	493,860.00	479,234.00	4,724.71	148,019.75	326,489.54
0727		MULTILINGUAL/MULTICULTURAL MED	2,013,023.00	1,792,049.00	6,225.28	570,930.40	1,214,893.32
0728		MATERIALS DEVELOPMENT LAB			43,237.48	13,549.29	56,786.77-
0731		AMERICAN INDIAN EDUCATION	10,304.00	29,386.00	6,183.08	5,540.32	17,662.60
0732		CAREER & TECHNICAL PREPARATION	3,549,779.00	3,532,760.42	141,612.51	774,823.22	2,616,324.69
0733		SCHOOL FAMILY & COMM PARTNERS	865,736.21	855,882.43	22,352.47	291,372.98	542,156.98
0735		FAMILY AND COMMUNITY ENGAGE	199,881.00	200,761.29		72,267.22	128,494.07
0737		CURRICULUM & PROF DEVELOP	7,794,155.00	8,888,173.87	521,974.04	4,803,139.17	3,563,060.66
0739		LINKED LEARNING	850,000.00	1,477,042.22	126,024.36	312,138.71	1,038,879.15
0740		ENROLLMENT CENTER	1,573,871.00	1,828,219.42	218,473.15	724,560.49	885,185.78
0741		STRATEGIC PLAN INITIATIVES	769,603.00	50,729.00			50,729.00
0742		EQUITY, ACCESS & EXCELLENCE	1,764,775.00	2,080,593.24	598,659.43	599,632.39	882,301.42
0744		STRATEGY & INNOVATION OFFICE	2,075,744.00	2,088,663.77	26,215.52	803,074.28	1,239,373.97
0745		MATRICULATION & ORIENTATION C	1,072,162.00	1,032,206.98	12,000.00	405,795.22	614,411.76
0746		COUNSELING SERVICES	178,561.00	431,184.00		136,009.56	295,174.44
0747		LOCAL CONTRL & ACCNTBLTY PLAN	2,000.00				
0750		SPECIAL EDUCATI	66,080,553.33	63,485,873.39	12,615,407.58	14,129,246.25	36,741,219.56
0752		YOUTH ENGAGEMENT SERVICES	166,500.00	166,500.00	71,315.52	58,385.56	36,798.92
0754		GIFTED & TALENTED ED. (GATE)	1,066,282.00	1,011,764.20	88,659.24	146,173.43	776,931.53
Filtered by User Permissions, (Org = 97, Online/Offline = N, Fiscal Year = 2019, Period = 5, Unposted JEs? = N, Assets and Liabilities? = N, Restricted Accts? = Y, SACS? = N, Fund = 01-71, Object = 1-7, Location = 0000-9999, Page Break? = N, Obj Digits = 0)							

Attachment "E"

S7. Unfunded Liabilities

Identify any changes in estimates for unfunded liabilities since budget adoption, and indicate whether the changes are the result of a new actuarial valuation.

S7A. Identification of the District's Estimated Unfunded Liability for Postemployment Benefits Other Than Pensions (OPEB)

DATA ENTRY: Click the appropriate button(s) for items 1a-1c, as applicable. Budget Adoption data that exist (Form 01CS, Item S7A) will be extracted; otherwise, enter Budget Adoption and First Interim data in items 2-4.

1. a. Does your district provide postemployment benefits other than pensions (OPEB)? (If No, skip items 1b-4)

Yes

- b. If Yes to Item 1a, have there been changes since budget adoption in OPEB liabilities?

No

- c. If Yes to Item 1a, have there been changes since budget adoption in OPEB contributions?

No

2. OPEB Liabilities

- a. Total OPEB liability
b. OPEB plan(s) fiduciary net position (if applicable)
c. Total/Net OPEB liability (Line 2a minus Line 2b)
d. Is total OPEB liability based on the district's estimate or an actuarial valuation?
e. If based on an actuarial valuation, indicate the date of the OPEB valuation.

Budget Adoption (Form 01CS, Item S7A)	First Interim
647,189,172.00	780,518,410.00
54,757,952.00	54,757,952.00
592,431,220.00	725,760,458.00

Actuarial	Actuarial
Jul 01, 2015	Jun 30, 2016

3. OPEB Contributions

- a. OPEB actuarially determined contribution (ADC) if available, per actuarial valuation or Alternative Measurement Method
Current Year (2018-19)
1st Subsequent Year (2019-20)
2nd Subsequent Year (2020-21)

Budget Adoption (Form 01CS, Item S7A)	First Interim
56,770,807.00	41,766,451.00
56,770,807.00	41,766,451.00
56,770,807.00	41,766,451.00

- b. OPEB amount contributed (for this purpose, include premiums paid to a self-insurance fund) (Funds 01-70, objects 3701-3752)
Current Year (2018-19)
1st Subsequent Year (2019-20)
2nd Subsequent Year (2020-21)

28,829,785.00	25,091,452.59
28,971,064.00	25,091,452.59
28,971,064.00	25,091,452.59

- c. Cost of OPEB benefits (equivalent of "pay-as-you-go" amount)
Current Year (2018-19)
1st Subsequent Year (2019-20)
2nd Subsequent Year (2020-21)

16,500,000.00	16,500,000.00
16,500,000.00	16,500,000.00
16,500,000.00	16,500,000.00

- d. Number of retirees receiving OPEB benefits
Current Year (2018-19)
1st Subsequent Year (2019-20)
2nd Subsequent Year (2020-21)

3,114	3,114
3,114	3,114
3,114	3,114

4. Comments:

S6B. Comparison of the District's Annual Payments to Prior Year Annual Payment

DATA ENTRY: Enter an explanation if Yes.

- 1a. Yes - Annual payments for long-term commitments have increased in one or more of the current or two subsequent fiscal years. Explain how the increase in annual payments will be funded.

Explanation:
(Required if Yes
to increase in total
annual payments)

The payment for the lease revenue bonds will be paid out of the Capital Project for Blended Components and Developer Fee funds beginning in 2018-19. The Bond Interest and Redemption fund will cover the other increases due to the sale of Measure Q and R Bonds.

S6C. Identification of Decreases to Funding Sources Used to Pay Long-term Commitments

DATA ENTRY: Click the appropriate Yes or No button in Item 1; if Yes, an explanation is required in Item 2.

1. Will funding sources used to pay long-term commitments decrease or expire prior to the end of the commitment period, or are they one-time sources?

No

2. No - Funding sources will not decrease or expire prior to the end of the commitment period, and one-time funds are not being used for long-term commitment.

Explanation:
(Required if Yes)

Attachment "F"

V. 511 JA

02

Framework Agreement ①
Sacramento Unified School District
Sacramento City Teachers Assn
11/5/17 3:25 PM

① Salary agreement

July 1, 2016 - June 30, 2019

	7/1/16 - 6/30/17	7/1/17 - 6/30/18	7/1/18 - 6/30/19
Salary increase	2.5%	2.5%	2.5%

Adjustment to
salary schedule
based on proposed
structure

3.5%
Maximum
District
Expenditure

2

School calendar

With the 60 days, the parties agree to meet and confer about the school calendar for the next 3 years. The ~~the~~ meet and confer shall include the start and end dates as well as the semester and dates. One major underlying goal is to offer opportunities for ~~as~~ enrichment for students to attend local institutions of higher education.

3

Destination District

Will's argue with the

DA

JA

3

expansion of the Committee to include other labor partners, leading community based organizations leaders, and other community representatives. The Committee's recommendations are advisory to the School board.

(4) ~~The Union~~ Other Committees

The subject of other committees as proposed by the Union will be addressed by applicable law.

(5) The Class size and other staffing goals

The parties agree to the following non binding goals for

100. 4
22

Class size and other stability
rules.

Class sizes maximums

- (1) Elementary primary (K-6) 24-1
- (2) 7th 8th grade 24-1
- (3) 9, 10, 11th grade For English, math, social science, and science 28-1, for all other subjects 35-1
- (4) Special Day class
 - Elementary 12-1
 - JVC 11 students to serve elementary 8-1
 - JVC secondary 12-1

(C) School Nurse

1 per 750 Students

(D) Librarians

1 for every secondary school
except opportunity schools.

(E) Program Specialists

1 per 500 Students

(F) Psychologists

1 per 1,000 students
with no more than 2 schools
per psychologist

(G) Behavioral
Specialist

No more than 5 schools
per specialist

D2

The parties agree that the
application of the savings or
set aside to the parties
Article 13 agrees
will determine the available funds
to achieve the agreed upon goals.
If the funds are not sufficient
to meet the goals, the parties will
negotiate priorities.

(6)

CTE

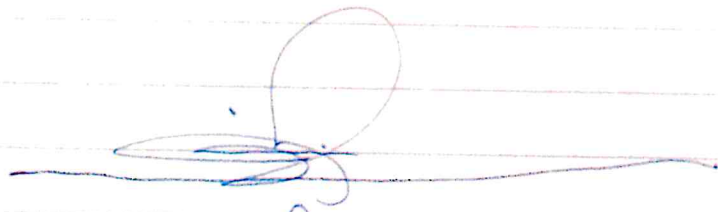
The parties with the steps
~~to meet the CTE~~ p
agree to negotiate for more & state
for the District CTE teachers

11/5/17

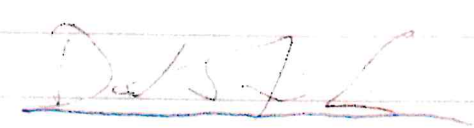
7

This agreement is
subject to the approval
of the city school Board
and the SCTA bargaining team.

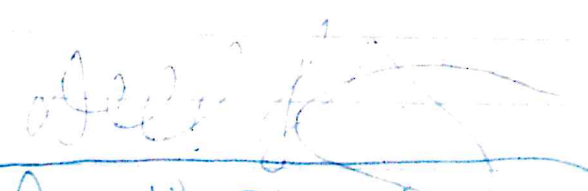
11/5/17



Jorge Aguilar
Superintendent



David
Fisher
President
SCTA



Darrell Sternberg
Mayor

On Nov 6, 2017, at 8:49 AM, Jorge Aguilar <JAguilar@scusd.edu> wrote:

Mayor and SCTA colleagues,

Thank you – like the Destination District committee, I our board would want to ensure similar language to that piece. I will forward to members of our board shortly. See below:

The District and the Association commit to working with Mayor Steinberg and other labor partners and leading community-based organization to sponsor a 2020 ^{bullet tax} ~~partial tax~~ that will enable the District to provide arts and music, restorative practices and other enhancements designed to enrich students' academic and cultural experiences, including summer school programs, to encourage students to stay in school to give all students an equal opportunity to graduate with the greatest number of postsecondary choices from the widest array of options.

ARTICLE 13 - EMPLOYEE BENEFITS

13.1 Health Insurance

13.1.1 The District and SCTA agree to negotiate in good faith on or before July 1, 2018, to eliminate potential changes to the health plan consistent with this section. The Board shall provide all eligible employees with a choice of the Kaiser Plan and a mutually agreed upon alternative plan(s), which is currently HealthNet. Health Net EW. Summary plan descriptions of the health plans will be included in Appendix X. The level of benefits of the plan (e.g. out of pocket maximums, co-payments, services covered, network scope, etc.), when evaluated in the aggregate, may not be reduced, and the providers may only be changed through mutual agreement of the parties. The parties agree that any savings that result from making changes to health plans or in the reduction of health plan costs will be applied to the certificated bargaining unit. The parties will negotiate how to apply to the bargaining unit any such savings achieved by the District. Savings shall be defined as any total amount per plan that is lower on an actual cost basis. The annual anniversary date for health plan changes will be July 1st.

a. ~~The Health Net T2 program shall be eliminated as an offering effective November 1, 2003. The members in the T2 program shall transfer to the EW program effective November 1, 2003, per the switching program. The District and SCTA shall work cooperatively to ensure a smooth transition for the affected members.~~

~~All active and retired members in the Health Net T2 health plan shall be transferred to Health Net "EW" plan per Health Net "switching" program. The parties shall work cooperatively to ensure a smooth transition for the affected members.~~

13.1.1.1 The Board shall fully pay the cost of the above health insurance plans for eligible employees, and will pay one-hundred percent (100%) of the premium cost for those dependents, including domestic partners and spouses, covered by the plans. In the event that a unit member has a spouse or domestic partner who is also employed by the District, the District shall pay only for one plan to cover the unit member and his/her spouse/domestic partner, provided that the benefits for any individual teacher are not reduced.

13.1.1.2 ~~Teachers selecting single coverage shall receive a monthly cash refund (subject to taxes) effective 07/01/02 as follows:~~

	<u>2004-05 *</u>	<u>2005-06 *</u>
Kaiser Singles	\$65.51	
Health Net EW	\$45.07 / \$52.49	
Health Net T2		

* Rates shown MONTHLY (12thly)

~~These amounts shall be adjusted in future years by the amount of the negotiated salary increase. The single coverage refund shall be increased 1.75% effective July 1, 2004.~~

~~The parties agree that the single stipend for the members enrolled in EW shall be maintained at the \$52.49 rate, provided that the District determines that the appropriate~~

cost swings are at an annualized rate of \$1,000,000 or more. If not, the single rate shall be a blended rate of \$45.07.

~~13.1.1.3 The parties agree to modify the co-pay on the Health Net EW plan from \$1 for doctor and prescription visits to \$5; however, Health New EW plan members who utilize the mail order prescription service shall pay \$3.~~

13.2 Dental Insurance

13.2.1 The Board shall provide all eligible employees with a fully paid dental plan. The Board shall pay ~~one hundred seventy-five~~ percent (~~100%~~75%) of the premium costs for eligible dependents. The plans offered shall be the current fee-for-service plan and may include a pre-paid dental plan (i.e., a dental HMO) upon mutual selection annually by the parties. A summary plan description will be included in Appendix X.

13.3 Vision Care

13.3.1 The Board shall provide employees with the current fee-for-service vision care plan and ~~will~~ may provide a family vision plan upon annual selection by the parties.

13.4 Life Insurance

13.4.1 The Board shall provide all eligible employees with a fully paid life insurance policy. The Board shall pay seventy-five per cent (75%) of the life insurance premium for eligible dependents.

13.5 Tax Sheltered Annuities

13.5.1 Employees may participate in the tax--sheltered annuity plan of their choice. Payroll deductions will be made for employees upon execution of the proper District form and in accordance with District rules.

13.6 Deferred Compensation

13.6.1 Payroll deductions will be made for Board of Education approved deferred compensation plans upon their execution of the appropriate District form.

13.7 Medical Examinations and Tests

13.7.1 All medical examinations and tests related to application requirements for new employees shall be paid for by the Board.

13.8 The Board of Education shall continue to provide, at no cost to the teachers, liability insurance coverage. Further, an agent of the insurance company will take immediate action to defend the teacher in any suit within the coverage provided.

13.9 Eligibility for District-Paid Insurance Benefits

13.9.1 Members of the bargaining unit employed under contract for not less than half-time ~~and not less than one (1) full semester~~ are eligible for fully-paid health, dental, life insurance, and vision care as provided in Sections 13.1 through 13.4.1.

13.9.2 Employees who are eligible under the conditions set forth in Section 13.9.1 of this Article, who are absent because of illness, and who have exhausted sick leave benefits shall continue to be covered by fully-paid health, dental, life insurance, and vision care

MT
CWC
CWC

Attachment "6"

Fiscal02a

Account Summary by Object-Balance

Balances through June (12)						Fiscal Year 2017/18	
Fd- Rscce- Y- Obj t - Ut - Goal - Func- Pr g- Loca - Proj	Description	Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance	
Fund 01 - General, Location 0742 - EQUITY/ACCESS							
01- 0000- 0- 1102- 15- 1110- 1000- 000- 0742- 000	TchrSub, RgEdK12, Instruct		1,423.64		1,423.64		
	Total for Object 1102		1,423.64	.00	1,423.64	.00	
01- 0000- 0- 1341- 60- 0000- 7100- 000- 0742- 000	AdminReg, Undistrib, Board/	158,340.00	158,340.00		236,011.36	77,671.36-	
01- 0012- 0- 1341- 30- 0000- 2100- 000- 0742- 000	AdminReg, Undistrib, InsSup	127,262.00	127,262.00		175,870.97	48,608.97-	
	Total for Object 1341	285,602.00	285,602.00	.00	411,882.33	126,280.33-	
01- 0000- 0- 2252- 25- 0000- 8300- 000- 0742- 000	SuppSub, Undistrib, Securit		417.66		417.66		
	Total for Object 2252	.00	417.66	.00	417.66	.00	
01- 0000- 0- 2301- 60- 0000- 7200- 000- 0742- 000	ClsfdAdReg, Undistrib, OthG		101,081.91		104,343.44	3,261.53-	
	Total for Object 2301	.00	101,081.91	.00	104,343.44	3,261.53-	
01- 0000- 0- 2401- 20- 0000- 7200- 000- 0742- 000	ClericReg, Undistrib, OthGe		30,442.00		15,072.97	15,369.03	
	Total for Object 2401	.00	30,442.00	.00	15,072.97	15,369.03	
01- 0000- 0- 3101- 15- 1110- 1000- 000- 0742- 000	STRSCert, RgEdK12, Instruct				118.12	118.12-	
01- 0000- 0- 3101- 60- 0000- 7100- 000- 0742- 000	STRSCert, Undistrib, Board/	22,142.00	22,142.00		23,044.11	902.11-	
01- 0012- 0- 3101- 30- 0000- 2100- 000- 0742- 000	STRSCert, Undistrib, InsSup	18,364.00	18,364.00		21,360.99	2,996.99-	
	Total for Object 3101	40,506.00	40,506.00	.00	44,523.22	4,017.22-	
01- 0000- 0- 3102- 25- 0000- 8300- 000- 0742- 000	STRSClsfd, Undistrib, Secur				28.68	28.68-	
	Total for Object 3102	.00	.00	.00	28.68	28.68-	
01- 0000- 0- 3202- 20- 0000- 7200- 000- 0742- 000	PERSClsfd, Undistrib, OthGe		4,304.32		2,162.18	2,142.14	
01- 0000- 0- 3202- 60- 0000- 7200- 000- 0742- 000	PERSClsfd, Undistrib, OthGe		15,653.24		16,107.63	454.39-	
	Total for Object 3202	.00	19,957.56	.00	18,269.81	1,687.75	
01- 0000- 0- 3301- 15- 1110- 1000- 000- 0742- 000	SSCert, RgEdK12, Instruct				25.21	25.21-	
	Total for Object 3301	.00	.00	.00	25.21	25.21-	
01- 0000- 0- 3302- 20- 0000- 7200- 000- 0742- 000	SSClsfd, Undistrib, OthGenA		1,887.20		934.54	952.66	
01- 0000- 0- 3302- 60- 0000- 7200- 000- 0742- 000	SSClsfd, Undistrib, OthGenA		6,161.28		6,372.29	211.01-	
	Total for Object 3302	.00	8,048.48	.00	7,306.83	741.65	
01- 0000- 0- 3311- 15- 1110- 1000- 000- 0742- 000	MediCert, RgEdK12, Instruct				20.61	20.61-	
01- 0000- 0- 3311- 60- 0000- 7100- 000- 0742- 000	MediCert, Undistrib, Board/	2,299.00	2,299.00		3,425.20	1,126.20-	
01- 0012- 0- 3311- 30- 0000- 2100- 000- 0742- 000	MediCert, Undistrib, InsSup	1,848.00	1,848.00		2,549.18	701.18-	
	Total for Object 3311	4,147.00	4,147.00	.00	5,994.99	1,847.99-	
01- 0000- 0- 3312- 20- 0000- 7200- 000- 0742- 000	MediClsfd, Undistrib, OthGe		441.20		218.58	222.62	
01- 0000- 0- 3312- 25- 0000- 8300- 000- 0742- 000	MediClsfd, Undistrib, Secur				5.97	5.97-	
01- 0000- 0- 3312- 60- 0000- 7200- 000- 0742- 000	MediClsfd, Undistrib, OthGe		1,440.14		1,490.30	50.16-	
	Total for Object 3312	.00	1,881.34	.00	1,714.85	166.49	

Account Summary by Object-Balance

Balances through June (12)

Fiscal Year 2017/18

Fd- Rsce- Y- Obj t - Ut - Goal - Func - Pr g- Loca- Pr oj	Description	Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance
Fund 01 - General, Location 0742 - EQUITY/ACCESS (continued)						
01- 0000- 0- 3352- 25- 0000- 8300- 000- 0742- 000	AltSSClfsl,Undistrib,Secu				8.22	8.22-
	Total for Object 3352	.00	.00	.00	8.22	8.22-
01- 0000- 0- 3402- 20- 0000- 7200- 000- 0742- 000	HlthClfsl,Undistrib,OthGe		22,195.56		10,150.94	12,044.62
01- 0000- 0- 3402- 60- 0000- 7200- 000- 0742- 000	HlthClfsl,Undistrib,OthGe		5,882.60		5,662.47	220.13
	Total for Object 3402	.00	28,078.16	.00	15,813.41	12,264.75
01- 0000- 0- 3411- 60- 0000- 7100- 000- 0742- 000	DentalCert,Undistrib,Boar	800.00	800.00		799.56	.44
01- 0012- 0- 3411- 30- 0000- 2100- 000- 0742- 000	DentalCert,Undistrib,InsS	799.00	799.00		799.56	.56-
	Total for Object 3411	1,599.00	1,599.00	.00	1,599.12	.12-
01- 0000- 0- 3412- 20- 0000- 7200- 000- 0742- 000	DentalClfsl,Undistrib,OthG		1,953.88		942.80	1,011.08
01- 0000- 0- 3412- 60- 0000- 7200- 000- 0742- 000	DentalClfsl,Undistrib,OthG		666.74		666.30	.44
	Total for Object 3412	.00	2,620.62	.00	1,609.10	1,011.52
01- 0000- 0- 3431- 60- 0000- 7100- 000- 0742- 000	VisCert,Undistrib,Board/S	127.00	127.00		126.36	.64
01- 0012- 0- 3431- 30- 0000- 2100- 000- 0742- 000	VisCert,Undistrib,InsSupA	126.00	126.00		126.36	.36-
	Total for Object 3431	253.00	253.00	.00	252.72	.28
01- 0000- 0- 3432- 20- 0000- 7200- 000- 0742- 000	VisClfsl,Undistrib,OthGen		225.50		108.75	116.75
01- 0000- 0- 3432- 60- 0000- 7200- 000- 0742- 000	VisClfsl,Undistrib,OthGen		104.94		105.30	.36-
	Total for Object 3432	.00	330.44	.00	214.05	116.39
01- 0000- 0- 3501- 15- 1110- 1000- 000- 0742- 000	UnempCert,RgEdK12,Instruc				.70	.70-
01- 0000- 0- 3501- 60- 0000- 7100- 000- 0742- 000	UnempCert,Undistrib,Board	95.00	95.00		118.01	23.01-
01- 0012- 0- 3501- 30- 0000- 2100- 000- 0742- 000	UnempCert,Undistrib,InsSu	76.00	76.00		87.87	11.87-
	Total for Object 3501	171.00	171.00	.00	206.58	35.58-
01- 0000- 0- 3502- 20- 0000- 7200- 000- 0742- 000	UnempClfsl,Undistrib,OthG		18.18		7.51	10.67
01- 0000- 0- 3502- 25- 0000- 8300- 000- 0742- 000	UnempClfsl,Undistrib,Secu				.18	.18-
01- 0000- 0- 3502- 60- 0000- 7200- 000- 0742- 000	UnempClfsl,Undistrib,OthG		60.60		51.34	9.26
	Total for Object 3502	.00	78.78	.00	59.03	19.75
01- 0000- 0- 3601- 15- 1110- 1000- 000- 0742- 000	WCCert,RgEdK12,Instruc				23.93	23.93-
01- 0000- 0- 3601- 60- 0000- 7100- 000- 0742- 000	WCCert,Undistrib,Board/Su	2,660.00	2,660.00		3,965.00	1,305.00-
01- 0012- 0- 3601- 30- 0000- 2100- 000- 0742- 000	WCCert,Undistrib,InsSupAd	2,138.00	2,138.00		2,954.61	816.61-
	Total for Object 3601	4,798.00	4,798.00	.00	6,943.54	2,145.54-
01- 0000- 0- 3602- 20- 0000- 7200- 000- 0742- 000	WCClsl,Undistrib,OthGenA		511.22		253.24	257.98
01- 0000- 0- 3602- 25- 0000- 8300- 000- 0742- 000	WCClsl,Undistrib,Securit				7.04	7.04-
01- 0000- 0- 3602- 60- 0000- 7200- 000- 0742- 000	WCClsl,Undistrib,OthGenA		1,698.23		1,752.97	54.74-
	Total for Object 3602	.00	2,209.45	.00	2,013.25	196.20

Selection

Grouped by Account Type, Filtered by User Permissions and (Orig = 97, Online/Offline = N, Fiscal Year = 2018, Unposted JEs? = N, Assets and Liabilities? = N, Restricted? = Y, Fund = 01-71, Object = 0000-9999, Object Digits = 4, Page Break Level = 2)

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Balances through June (12)

Fiscal Year 2017/18

Fd - Rsce - Y - Obj t - Ut - Goal - Func - Pr g - Loca - Proj	Description	Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance
Fund 01 - General, Location 0742 - EQUITY/ACCESS (continued)						
01-0000-0-3701-60-0000-7100-000-0742-000	OPEBAICer, Undistrib, Boar	5,544.00	5,544.00		5,040.00	504.00
01-0012-0-3701-30-0000-2100-000-0742-000	OPEBAICer, Undistrib, InsS	5,544.00	5,544.00		5,040.00	504.00
	Total for Object 3701	11,088.00	11,088.00	.00	10,080.00	1,008.00
01-0000-0-3702-20-0000-7200-000-0742-000	OPEBAICIs, Undistrib, OthG		4,704.00		2,100.00	2,604.00
01-0000-0-3702-60-0000-7200-000-0742-000	OPEBAICIs, Undistrib, OthG		4,704.00		4,200.00	504.00
	Total for Object 3702	.00	9,408.00	.00	6,300.00	3,108.00
01-0000-0-3901-60-0000-7100-000-0742-000	LifeCert, Undistrib, Board/	165.00	165.00		165.00	
01-0012-0-3901-30-0000-2100-000-0742-000	LifeCert, Undistrib, InsSup	165.00	165.00		165.00	
	Total for Object 3901	330.00	330.00	.00	330.00	.00
01-0000-0-3902-20-0000-7200-000-0742-000	LifeClstf, Undistrib, OthGe		10.80		5.50	5.30
01-0000-0-3902-60-0000-7200-000-0742-000	LifeClstf, Undistrib, OthGe		137.50		137.50	
	Total for Object 3902	.00	148.30	.00	143.00	5.30
01-0000-0-4310-00-1110-1000-000-0742-000	InstMatIs, RgEdK12, Instruc	10,000.00				
01-0037-0-4310-00-1110-4000-000-0742-000	InstMatIs, RgEdK12, Ancilar		234,931.40		122,791.49	112,139.91
01-3010-0-4310-00-1110-1000-000-0742-000	InstMatIs, RgEdK12, Instruc		20,000.00			20,000.00
	Total for Object 4310	10,000.00	254,931.40	.00	122,791.49	132,139.91
01-0000-0-4320-00-0000-2100-000-0742-000	NonInstMat, Undistrib, InsS		1,540.57		1,417.03	123.54
01-0012-0-4320-00-0000-2100-000-0742-000	NonInstMat, Undistrib, InsS		400.00		205.61	194.39
	Total for Object 4320	.00	1,940.57	.00	1,622.64	317.93
01-0000-0-4410-00-0000-2100-000-0742-000	Equip 500+, Undistrib, InsS		1,200.00		1,323.54	123.54-
01-0037-0-4410-00-1110-4000-000-0742-000	Equip 500+, RgEdK12, Ancila		36,121.65			36,121.65
	Total for Object 4410	.00	37,321.65	.00	1,323.54	35,998.11
01-0012-0-5100-00-0000-2100-000-0742-000	SUBAGREEME, Undistrib, InsS		13,450.00		13,450.00	
01-0037-0-5100-00-1110-4000-000-0742-000	SUBAGREEME, RgEdK12, Ancila		41,413.60		6,413.60	35,000.00
01-3010-0-5100-00-1110-1000-000-0742-000	SUBAGREEME, RgEdK12, Instru		637,500.00		637,500.00	
	Total for Object 5100	.00	692,363.60	.00	657,363.60	35,000.00
01-0012-0-5210-00-0000-2100-000-0742-000	InDistMile, Undistrib, InsS		1,300.00		688.12	611.88
	Total for Object 5210	.00	1,300.00	.00	688.12	611.88
01-0000-0-5230-00-0000-2100-000-0742-000	Travel, Undistrib, InsSupAd		2,583.88		2,894.87	310.99-
01-0000-0-5230-00-1110-1000-000-0742-000	Travel, RgEdK12, Instruct		100.00			100.00
01-0000-0-5230-00-1110-4000-000-0742-000	Travel, RgEdK12, AnciliarySv		2,000.00		1,920.00	80.00
01-0012-0-5230-00-0000-2100-000-0742-000	Travel, Undistrib, InsSupAd		107,850.00		535.00	107,315.00
01-0012-0-5230-00-0000-2700-000-0742-000	Travel, Undistrib, SchoolAd		100.00		42.00	58.00

Selection

Grouped by Account Type, Filtered by User Permissions and (Org = 97, Online/Offline = N, Fiscal Year = 2018, Unposted JEs? = N, Assets and

Liabilities? = Y, Fund = 01-71, Object = 1-7999, Location = 0000-9999, Object Digits = 4, Page Break Level = 2)

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Balances through June (12)

Fiscal Year 2017/18

Fd- Rsce- Y- Obj t - Ut - Goal - Func- Pr-g- Loca- Proj	Description	Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance
Fund 01 - General, Location 0742 - EQUITY/ACCESS (continued)						
01- 0012- 0- 5230- 00- 1110- 1000- 000- 0742- 000	Travel,RgEdK12,Instruct		100.00		63.00	37.00
	Total for Object 5230	.00	112,733.88	.00	5,454.87	107,279.01
01- 0012- 0- 5235- 00- 0000- 2495- 000- 0742- 000	NonEmpTrvl,Undistrib,Pare		1,300.00		600.00	700.00
	Total for Object 5235	.00	1,300.00	.00	600.00	700.00
01- 0000- 0- 5717- 00- 0000- 2100- 000- 0742- 000	Fingerprinting,Undistrib,		100.00			100.00
	Total for Object 5717	.00	100.00	.00	.00	100.00
01- 0000- 0- 5745- 00- 0000- 2100- 000- 0742- 000	DuplSvcs,Undistrib,InsSup		50.00		24.00	26.00
	Total for Object 5745	.00	50.00	.00	24.00	26.00
01- 0000- 0- 5800- 00- 0000- 2700- 000- 0742- 000	OthCont,Undistrib,SchoolA		996.67		991.68	4.99
01- 0012- 0- 5800- 00- 0000- 2100- 000- 0742- 000	OthCont,Undistrib,InsSupA		25,500.00		25,000.00	500.00
01- 0037- 0- 5800- 00- 1110- 4000- 000- 0742- 000	OthCont,RgEdK12,AnciliaryS		59,933.35		46,530.69	13,402.66
01- 3010- 0- 5800- 00- 1110- 1000- 000- 0742- 000	OthCont,RgEdK12,Instruct		25,000.00		25,000.00	
	Total for Object 5800	.00	111,430.02	.00	97,522.37	13,907.65
	Total for Location 0742 and Expense accounts	358,494.00	1,768,091.46	.00	1,543,966.28	224,125.18

Selection

Grouped by Account Type, Filtered by User Permissions and (Org = 97, Online/Offline = N, Fiscal Year = 2018, Unposted JEs? = N, Assets and

Liabilities? = N, Restricted? = Y, Fund = 01-71, Object = 1-7999, Location = 0000-9999, Object Digits = 4, Page Break Level = 2)

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Attachment "H"



Statement of Work: Participation in the CORE Collaborative

About the CORE Collaborative

CORE Districts is a collaboration of school districts working together to improve student achievement through highly productive, meaningful partnership and learning between member school districts. Currently, eight school districts serving more than 1 million students participate in the collaborative: Fresno, Garden Grove, Long Beach, Los Angeles, Oakland, Sacramento, San Francisco, and Santa Ana Unified. Together, our districts share a fundamental belief that all students can achieve at high levels and are deeply committed to providing learning opportunities that will help them to do so.

As a collaborative effort, the work of CORE Districts is directed by, and in service of, the participating school districts. Exemplifying this, the CORE Board of Directors is comprised of the superintendents of each member school district and provides supervision, direction, and strategic vision for the organization. The number of participating districts is capped at 15, thus each participating district has a meaningful voice and leadership role as they collaborate with other districts. Organizationally, CORE Districts is a 501c3 nonprofit serving as a hub for this collaboration and supporting partnership and shared learning at the superintendent, central office, school leader, and teacher levels.

CORE Districts' long-term goal is for all California students to have strong support, effective programming, and an educational community standing together by their side so that they can achieve and succeed in college and career. We are working towards this goal by supporting and facilitating inter- and intra-district collaboration to innovate, implement, and scale successful strategies and tools that help students succeed.

Partnership Benefits

CORE Improvement Communities for Cross-District Teams

The participating CORE school districts are collaborating to address a specific problem of practice based on district priorities through cycles of improvement rooted in improvement science. The first problem of practice that is being addressed is to improve math proficiency of African-American and Hispanic/Latino students, especially in grades 4-8.

The roles and commitments of both district teams and the hub organization include:

District Improvement Team

- **Who:** Cross-functional district improvement teams of approximately six to eight individuals per district. Depending on the district structure, problem of practice, and needs, this team may include:
 - Improvement lead: Project manage the improvement science work of the district through facilitation and coaching at the district and school levels
 - Cabinet officer: Senior team member who serves as executive sponsor and guide the team
 - Principal supervisor: Brings school perspective and integrates with other efforts underway, interfaces with principals
 - Functional lead(s): Brings relevant content expertise based on the problem the district has prioritized and helps integrate with other initiatives
 - Data and accountability lead: Helps problem solve how to measure improvement

- School site leader: Removes competing obligations from teachers weave in improvement work with other initiatives at school level
- **Key role**: Guiding improvement work and building capacity at the district level.
- **Commitment**: The Improvement Lead's commitment includes attending four in-person convenings, bi-weekly check-ins with the CORE hub organization, and several hours of work per week between convenings. The commitment for the remaining team members includes attending four in-person convenings and one to two hours of work per week between convenings.

School Improvement Team (possible structure as work progresses to the school level in a subset of schools designated by the district)

- **Who**: Cross-functional school improvement teams of approximately six to eight individuals per school. This team might include:
 - School improvement lead: Facilitating weekly or bi-weekly meetings of the school improvement team, and communicating issues and needs to the district improvement leads
 - Teachers: Tailoring interventions to their individual classroom contexts and gathering data to measure improvement and accountability
 - Instructional coaches: Problem solving with teachers to help ensure change ideas are tested with fidelity
 - Principals: Working with district leadership to ensure there is adequate capacity for improvement work in their individual school
- **Key role**: Execute PDSA cycles to test and learn from change ideas at the school level.
- **Commitment**: Team members' commitment includes attending four in-person convenings per year and approximately two hours of work per week between convenings.

What the CORE hub will do to support your district

- **Build CORE Improvement Community structure**: Provide infrastructure for collaboration, manage logistics, serve as a steward for improvement community integrity and effectiveness, and listen to feedback and adjust approach.
- **Facilitation and coaching**: Facilitate connections and coordinate collaborations between districts, connect districts with well-aligned resources, develop and deliver meaningful convenings, and coach districts to ensure coherence with other efforts.
- **Knowledge management and analytics**: Develop and manage tools and resources that districts can use to effectively employ improvement science, serve as the analytical engine of the communities and provide analysis, and collect and curate knowledge and best practices from districts across and outside the improvement community.

CORE Districts members will have full access to the active improvement communities, inclusive of costs for traveling to and attending CORE-wide meetings of the improvement communities. The specific problems of practice and number of improvement communities may change over time to meet the needs of the collaborative, and decisions about the active improvement communities, their meeting budgets, and their focal areas will continue to be made by CORE Board of Directors.

Professional Learning Communities for District Leaders

The participating CORE school districts also work and learn together through inter-connected professional learning communities (PLCs) for district leaders. Teams of approximately two to five individuals per district participate in such PLCs, convening in person two to six times per year per PLC, as well as via regular virtual meetings.

Currently, one such community is active:



Data Leads

- **Who:** District analytical and research experts
- **What:** District analytical leads work together and with data experts to further develop and refine CORE's multiple measures accountability system and learn from each other.
- **Example of past work and success:** Developed a novel and multiple-measures-based accountability calculation called the School Quality Improvement Index. Index reports were released to leaders and educators in Winter 2015 and were publicly released in February 2016. CORE's Index represents the first accountability system in the nation that is fully aligned to the new federal ESSA legislation.

CORE Districts members will continue to have full access to the active district-level PLCs, inclusive of costs for traveling to and attending CORE-wide meetings of the PLCs. The specific type and work of the PLCs may change over time to meet the needs of the collaborative, and decisions about the active PLCs, their meeting budgets, and their focal areas will continue to be made by CORE Board of Directors.

CORE Data Collaborative

Over the past two years, with leadership from and stakeholder engagement in your district, CORE Districts has developed an innovative multiple measures accountability system, called the School Quality Improvement System, as well as an underlying data system. This accountability system is fully compliant with the new federal ESSA legislation and is aligned to LCFF – in fact, the metrics utilized for the Index (the calculation at the heart of the accountability system) can be used for the LCAP.

As a founding member of the CORE Data Collaborative, your district will receive:

- Multi-metric school and district Data Dashboards with performance benchmarked against peers across California;
 - Included metrics: Academic Achievement, Academic Growth, High School Readiness, Graduation, Chronic Absence, Suspension Rates, English Learner Re-Designation Rates, Special Education Disproportionality, Social Emotional Skills, and Student/Staff/Family Climate Surveys;
- Dynamic reporting and opportunities for deeper analysis using the EdVantage platform (e.g., drilling down, filtering, and extracting data and graphs);
- Strategic analytics by CORE Districts' partners at Education Analytics;
- Integration of measures and learnings into CORE District PLC sessions; and
- Additional professional/peer learning opportunities.

Beginning this year, additional LEAs who are not CORE Districts members have had the opportunity to join the CORE Data Collaborative for a fee. Forming this expanded Data Collaborative gives CORE Districts members a better opportunity to influence the accountability system that California adopts, as well as a larger data set for analysis and benchmarking in support of continual improvement and raising student achievement.

As a full CORE Districts member, your district enjoys several additional benefits that these new Data Collaborative members do not have, including:

- Through participation in the Data Leads PLC, the opportunity to influence the refinement of the Index and the inclusion of new metrics;
- By representation on the CORE Board of Directors, the ability to modify and update the Index; and
- By representation on the CORE Board of Directors, the ability to change the fee structure for participation in the Data Collaborative.

CORE-PACE Research Partnership



Policy Analysis for California Education (PACE) is CORE Districts' primary research partner. CORE Districts members have the opportunity to participate in multi-LEA research studies in ways that are designed to impact both policy and practice. The research activity that CORE and PACE are engaged in over the next year is focused on answering two major questions that are most important for both continuous improvement and developing smarter policy:

1. What is the effect of including diverse measures in an accountability index?
2. Does peer-to-peer collaboration lead to changes in practice?

In future years, CORE District staff and superintendents will be able to prioritize additional research topics for exploration.

State and National Voice:

Together, the CORE Districts members serve more than 1 million students and their families, representing 18% of all California students. Thus, by working together, the CORE Districts members serve a significant proportion of the state's students and have the opportunity to have a much greater voice at both the state and national level.

In addition to the CORE Improvement Community and PLCs described above, participating school district superintendents have the opportunity to participate in a PLC, collaborating and learning from each other around shared problems of practice. These often have state and federal policy implications. Through the power of the group, participating districts have an outsize policy impact. Examples of policy impact thus far include:

- LCAP – Released months before the State legislature developed our LCAP process, the School Quality Improvement Index informed much of the policy conversation and the LCAP data metrics have 85% crossover with the SQII Metrics.
- ESSA – The Every Student Succeeds Act perfectly aligns with CORE's Index and our multiple measures work helped influence the final bill. In addition, CORE's Index is being used as a model for California as the state works to comply with the new federal law.
- NCLB Waiver – CORE Districts received the only district-level waiver from NCLB, which allowed the districts to develop a novel and holistic accountability system and receive increased flexibility for the use of their Title 1 funds.
- Accountability – a participating CORE superintendent, on behalf of CORE, sits on Superintendent Torlakson's statewide accountability taskforce.
- Great Teachers – Along with Linda Darling Hammond, a CORE superintendent, on behalf of CORE and his district, co-chairs the Superintendent's Greatness by Design committee.

Partnership Costs and Payment Schedule

Each member of CORE Districts will pay annual dues structured to meet the financial needs of the collaborative and to enable the collaborative to provide the aforementioned benefits.

The cost for CORE Districts membership has two components:

1. Base contribution: A fixed cost divided amongst districts equally to support basic operations; and
2. Program contribution: A variable cost based on program participation and size (ADA).

The pricing and payment schedule for SCUSD is:

- Full annuals dues: \$198,375
 - Total contribution = \$123,000 base contribution + \$75,375 program contribution.
- Member contributions will be eased in over five years according to the following schedule:



- SY 2016-17: \$31,000 (\$166,375 less than full dues)
- SY 2017-18: \$62,000 (\$135,375 less than full dues)
- SY 2018-19: \$93,000 (\$104,375 less than full dues)
- SY 2019-20: \$124,000 (\$73,375 less than full dues)
- SY 2020-21: \$198,375

Additional Opportunities and Cost Structure

CORE Survey Administration through Panorama Education

As an additional opportunity for support, CORE Districts can provide support for SCUSD's survey initiatives relating to participation in CORE Districts' School Quality Improvement System. In partnership with CORE Districts' subcontractor Panorama Education, Inc., CORE Districts will support online student, staff, and family survey programs, including survey administration and reporting. CORE Districts will also provide technical assistance and guidance in support of SCUSD's utilization of results for continuous improvement.

With survey administration through Panorama Education, SCUSD will receive the following services from CORE Districts:

- Online administration and reporting relating to the School Quality Improvement System, of student SEL and/or culture-climate surveys.
- Online administration and reporting relating to the School Quality Improvement System, of teacher reports on students (optional).
- Online administration and reporting relating to the School Quality Improvement System, of the staff culture-climate survey.
- Addition of custom questions at the end of the surveys relating to the School Quality Improvement System (custom questions may be free response or multiple choice; multiple choice items will be scored using the same metric as the main survey items).
- Raw extracts of the responses to CORE Districts' analytical partners, relating to the School Quality Improvement System.

In addition, CORE Districts would provide SCUSD with access to and use of its Panorama online-hosted software-as-a-service, which includes the following key features and functionality:

- District students, parents, and staff will have access to Panorama's online platform, with access controlled by their role and site.
- Students may complete surveys and social-emotional learning assessments online by logging in with their student ID numbers.
- Staff members may complete surveys online using a unique link assigned to their school.
- Families may complete surveys online using a unique link assigned to their schools.
- District staff may download PDFs of paper survey forms from Panorama for printing and distribution to families, and District staff may upload PDF scans of completed survey forms to Panorama for processing;
- Student and family surveys will be available in multiple languages.
- District administrative staff will be able to administer teacher assessments of student social-emotional learning, if desired.
- District administrative staff will be able to upload student roster and performance data into Panorama for analytic purposes.
- Authorized District employees will have access to Panorama's reporting and analytics tools. Panorama's analytics tools allow users to view and analyze survey results; Panorama reports are available online and as printable PDFs. Key features include overall summary reports, detailed item-by-item reports, subgroup reports, and cross-school comparisons.



- Panorama includes sophisticated role-based access controls to ensure that each user can only access the appropriate data, and data for the appropriate site(s).
- Panorama integrates with Google Apps so that Districts users can authenticate using their Google Apps for Education (GAFE) accounts.

For CORE survey administration through Panorama Education, each member of CORE Districts will pay a variable cost based on size (ADA). The pricing for SCUSD is: \$58,633 (cost is \$1.10 per enrollee).

This per-student survey price includes:

- Survey administration;
- Data collection;
- Data analysis; and
- High-quality reports outlining school performance on SEL-CC indicators.



Attachment "I"

Account Summary by Object-Balance

Balances through June (12)

Fiscal Year 2017/18

Total for Object 4410		Description		Adopted Budget	Revised Budget	Encumbered	Expenditure	Account Balance
Fund 01 - General, Location 0750 - Spec Ed (continued)								
Total for Object 4410								
01-3310-0-5100-00-5001-2100-000-0750-000			SUBAGREEME,SpEdUns,InsSuf	155,940.00	133,840.00	.00	61,175.74	72,664.26
01-3310-0-5100-00-5750-1180-000-0750-000				250,000.00	75,000.00		77,770.97	2,770.97-
01-3311-0-5100-00-5050-2100-000-0750-000			SUBAGREEME,5/22 Sev,SpEd:	4,495,892.00	4,062,317.00		2,805,011.98	1,257,305.02
01-3311-0-5100-00-5050-2100-000-0750-000			SUBAGREEME,RegnlSvc,InsSu	54,000.00	194,895.00		35,614.37	159,280.63
01-3311-0-5100-00-5770-1190-000-0750-000			SUBAGREEME,5/22 Non,SE:Ot		45,892.10			45,892.10
01-3327-0-5100-00-5750-1180-000-0750-000			SUBAGREEME,5/22 Sev,SpEd:	95,723.00	94,693.00			94,693.00
01-3385-0-5100-00-5750-1110-000-0750-000			SUBAGREEME,5/22 Sev,SE:Se		139,420.00		139,420.00	
01-5640-0-5100-00-5750-3140-000-0750-000			SUBAGREEME,5/22 Sev,Healt		1,628,108.90			1,628,108.90
01-5640-0-5100-00-9954-3140-000-0750-000			SUBAGREEME,MAA,HealthSvc	584,844.75			47,500.04	158,229.96
01-6500-0-5100-00-5001-2100-000-0750-000			SUBAGREEME,SpEdUns,InsSuf	207,930.00	205,730.00		70,386.26	25,608.74
01-6500-0-5100-00-5050-2100-000-0750-000			SUBAGREEME,RegnlSvc,InsSu	75,000.00	95,995.00		27,806.59	2,793.41
01-6500-0-5100-00-5060-2100-000-0750-000			SUBAGREEME,RgnPrgSp,InsSu	30,600.00	30,600.00		39,821.72	6,228.28
01-6500-0-5100-00-5750-1110-000-0750-000			SUBAGREEME,5/22 Sev,SE:Se	27,000.00	46,050.00		1,529,724.97	801,394.97-
01-6500-0-5100-00-5750-1130-000-0750-000			SUBAGREEME,5/22 Sev,SE:AI	829,000.00	728,330.00		6,499.20	6,499.20-
01-6500-0-5100-00-5750-1131-000-0750-000			SUBAGREEME,5/22 Sev,SDCFI	75,000.00	74,000.00		14,170.00	59,830.00
01-6500-0-5100-00-5750-1180-000-0750-000			SUBAGREEME,5/22 Sev,SpEd:	10,083,077.00	9,961,649.00		23,294,374.39	13,332,725.39-
01-6500-0-5100-00-5750-1190-000-0750-000			SUBAGREEME,5/22 Sev,SE:Ot		4,100.00			4,100.00
01-6500-0-5100-00-5750-1194-000-0750-000			SUBAGREEME,5/22 Sev,DISVo		5,700.00		5,248.00	452.00
01-6500-0-5100-00-5751-1110-000-0750-000			SUBAGREEME,SE NPAS,SE:Si	4,400.00	3,400.00			3,400.00
01-6500-0-5100-00-5770-1190-000-0750-000			SUBAGREEME,5/22 Non,SE:Ot	202,700.00	134,290.00		115,551.76	18,738.24
01-6512-0-5100-00-5750-1180-000-0750-000			SUBAGREEME,5/22 Sev,SpEd:	808,862.00	588,127.00		409,817.94	178,309.06
01-9405-0-5100-00-5750-1180-000-0750-000			SUBAGREEME,5/22 Sev,SpEd:		1,855,949.96		1,471,424.96	384,525.00
Total for Object 5100				17,824,028.75	19,974,246.96	.00	30,090,143.15	10,115,896.19-
01-3315-0-5210-00-5730-1120-000-0750-000			InDistMile,Preschol,SE:Re	4,500.00				
01-5640-0-5210-00-9954-3140-000-0750-000			InDistMile,MAA,HealthSvc	500.00	500.00		183.38	316.62
01-6500-0-5210-00-5001-2100-000-0750-000			InDistMile,SpEdUns,InsSup		3,500.00		3,560.81	60.81-
01-6500-0-5210-00-5010-3120-000-0750-000			InDistMile,Assmnt,PsychSv		2,500.00		2,318.74	181.26
01-6500-0-5210-00-5020-3110-000-0750-000			InDistMile,Pre-Interv,Gui		1,563.00		135.14	1,427.86
01-6500-0-5210-00-5050-2100-000-0750-000			InDistMile,RegnlSvc,InsSu	55,000.00	900.00			900.00
01-6500-0-5210-00-5050-3120-000-0750-000			InDistMile,RegnlSvc,Psych		1,675.00		1,305.32	369.68
01-6500-0-5210-00-5050-3140-000-0750-000			InDistMile,RegnlSvc,Healt		2,000.00		24.08	1,975.92
01-6500-0-5210-00-5060-2100-000-0750-000			InDistMile,RgnPrgSp,InsSu		12,450.00		11,593.99	856.01
01-6500-0-5210-00-5730-1120-000-0750-000			InDistMile,Preschol,SE:Re		1,500.00		1,369.28	130.72
01-6500-0-5210-00-5750-1110-000-0750-000			InDistMile,5/22 Sev,SE:Se		5,937.00		5,163.50	773.50

Selection Grouped by Account Type, Filtered by User Permissions and (Org = 97, Online/Offline = N, Fiscal Year = 2018, Unposted JEs? = N, Assets and Liabilities? = N, Restricted? = Y, Fund = 01-71, Object = 0000-9999, Object Digits = 4, Page Break Level = 2)

ESCAPE ONLINE

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