

Board Office Use: Legislative File Info.	
File ID Number	
Introduction Date	
Enactment Number	
Enactment Date	



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

Board Cover Memorandum

To Measure G1 Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission

From Middle School Network

Meeting Date September 13, 2022

Subject Discussion of G1 Commission Oversight Tools/Development Needs

Ask of the Commission Discussion of G1 Commission Oversight Tools/Development Needs

Discussion Middle School Network is open to questions from the commission regarding the discussion of G1 Commission Oversight Tools/Development Needs.

Attachment(s) Draft of dashboard and plan attached



Dashboard Request & Clarifying Questions

OUSD Measure G1 Commission Meeting
September 13th, 2022

Measure G1 Dashboard Proposal: Overview

Proposed questions to be answered by the dashboard:

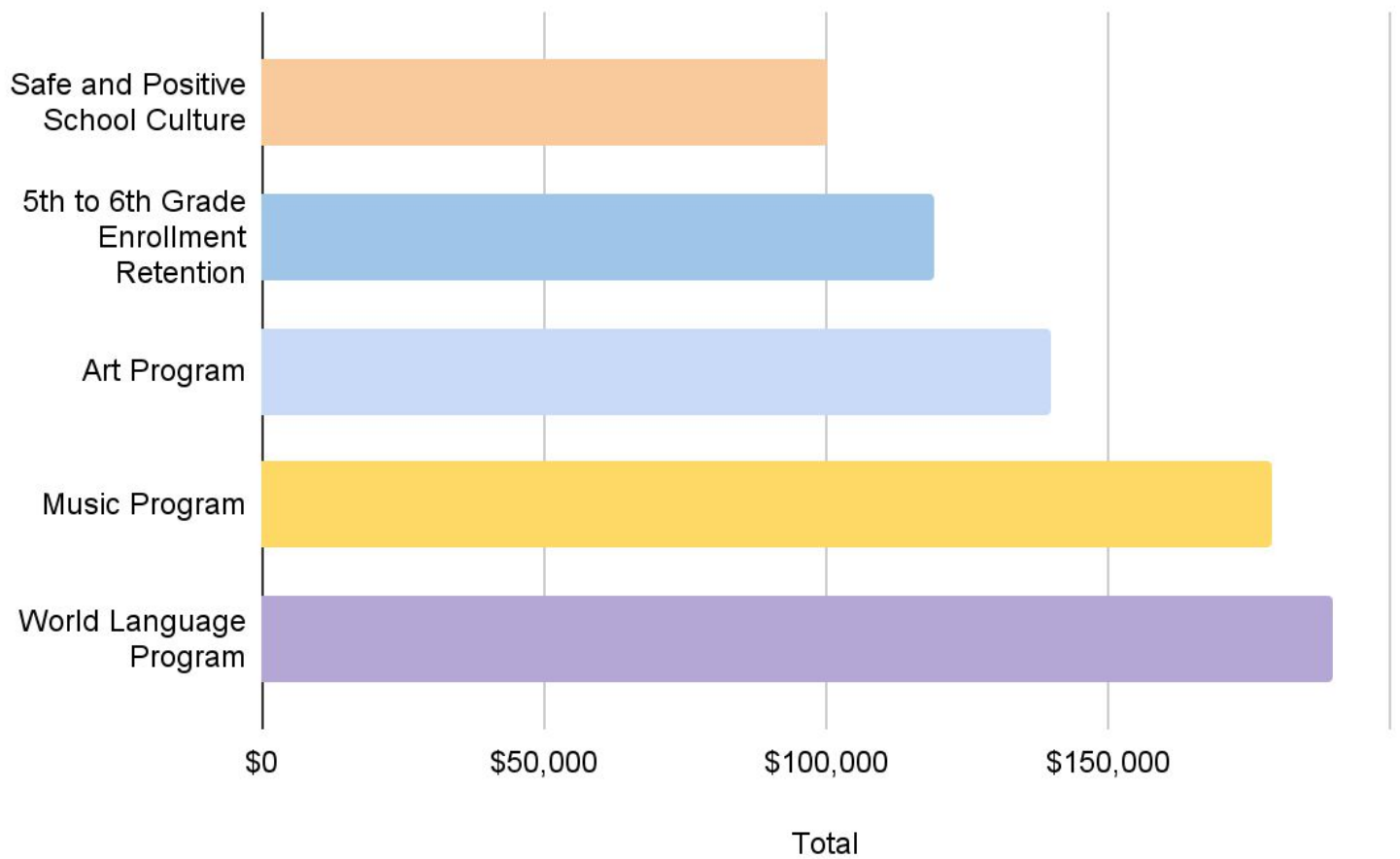
- 1) [What is the 2022-2023 distribution of approved funds* across the five Measure G1 programs?](#)
- 2) [For the 2022-2023 school year, what percentage of submitted proposals** have been accepted, rejected or are pending?](#)
- 3) [For the 2022-2023 school year, what is the status of each school's proposals?](#)
- 4) [For schools with accepted proposals, what is the breakdown of the amount requested for each of the 5 categories?](#)
- 5) [Interactive and up-to-date version of File ID Number 22-0595](#)
- 6) [A visual calendar with all past and future meeting dates and times](#)

*Approved funds - approved regular, surplus and carryover funding

**Submitted proposals - this bundles together regular funding and carryover funding

We would like this dashboard to be a publicly facing page dedicated to the Measure G1. We would also like this dashboard to be included as an attachment in all agendas for commission meetings.

1) What is the 2022-2023 overall distribution of approved funds across the five Measure G1 programs?



1) Cont'd

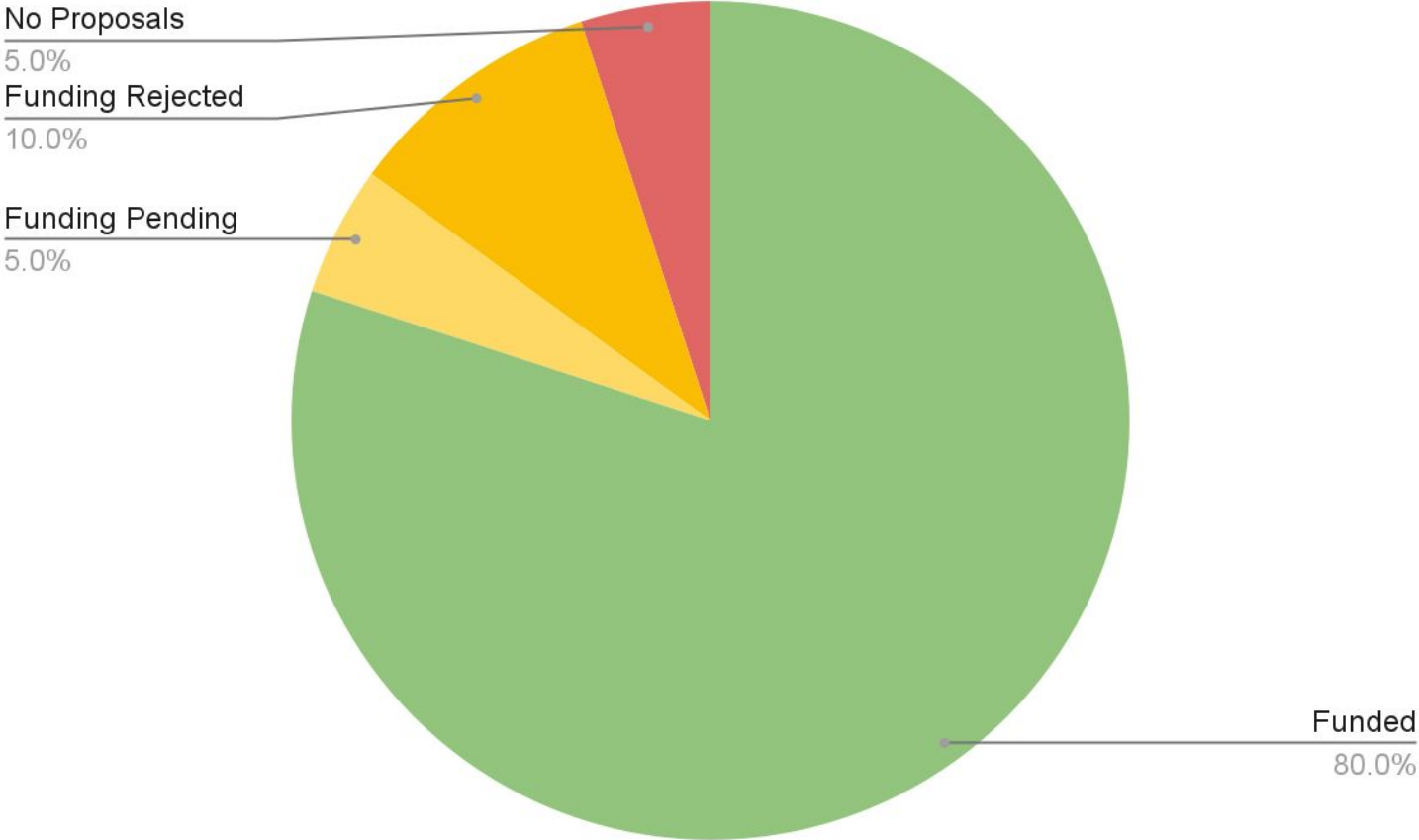
	<i>School Governing Board*</i>	<i>Program Type</i>
School A	OUSD	School and Positive Culture
School B	OUSD	World Language Program
School C	OUSD	World Language Program

For each of these categories, there should be an accompanying table listing the schools who have approved funds for each of these areas.

Clicking on the school name should bring up the associated proposal.

The column headers should be sortable.

2) For the 2022-2023 school year, what percentage of submitted proposals have been accepted, rejected or are pending?



3) For the 2022-2023 school year, what is the status of each school's proposal?

	<i>School Governing Board*</i>	<i>Funding Status*</i>
School A	OUSD	Pending
School B	OUSD	Approved
School B	OUSD	Approved
School C	ACOE	Rejected
School D . . .Etc	OUSD Charter	No Proposal

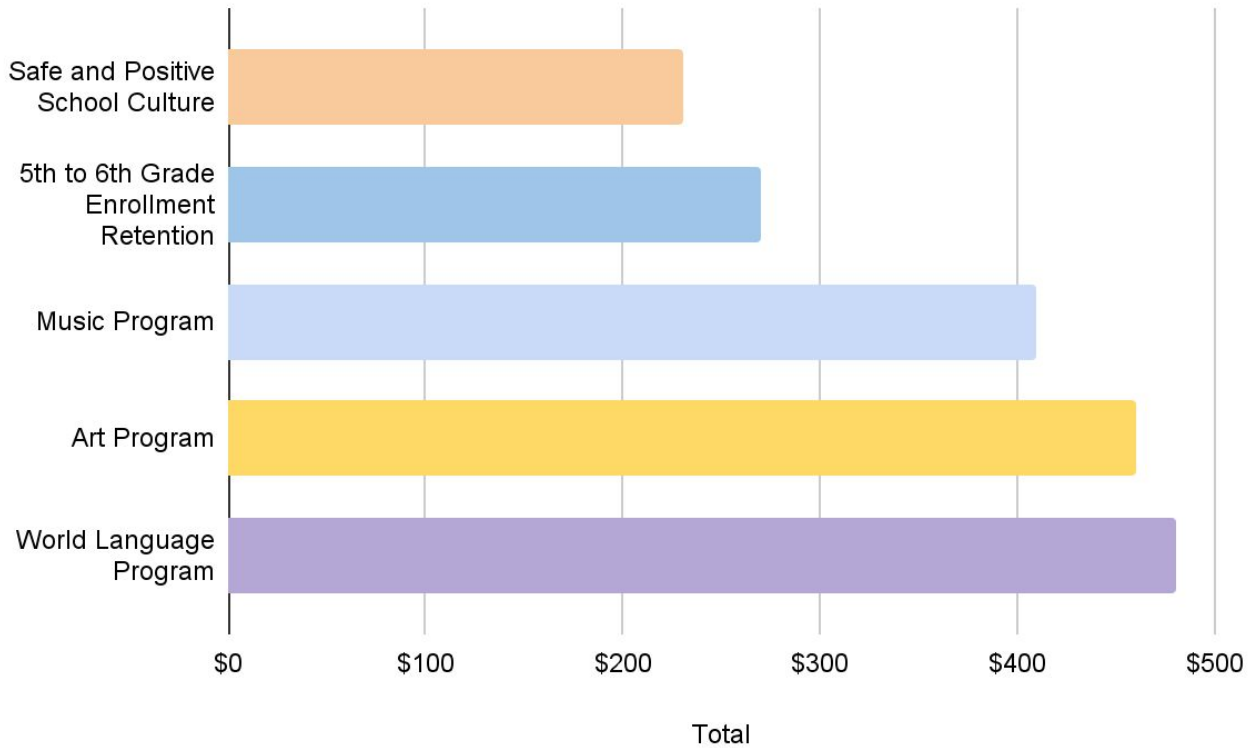
*These two columns should be sortable

If there are multiple proposals to request for both carryover and general funding, they will be listed as separate line items.

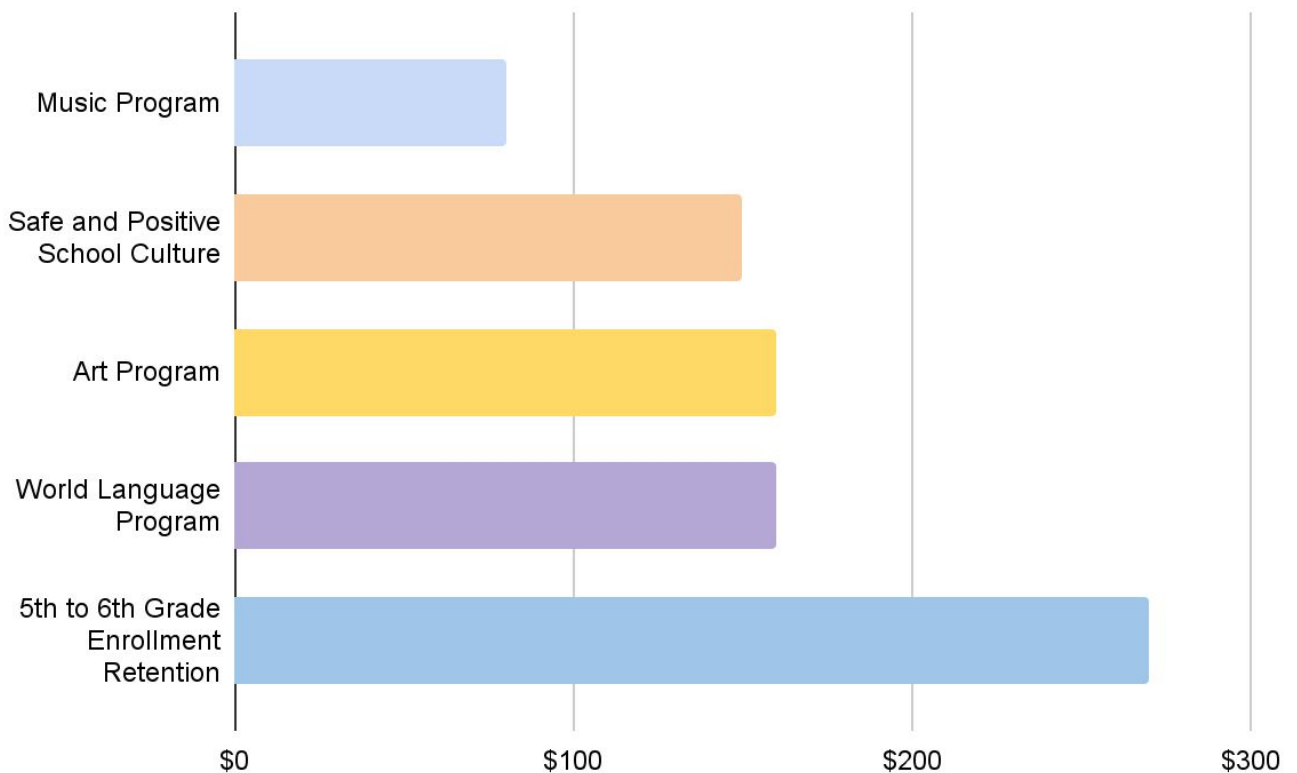
For each school who has submitted a proposal, their name should be clickable to pull up their 2022-2023 Proposal

4) For schools with accepted proposals, what is the breakdown of the amount requested for each of the 5 categories?

OUSD School A



OUSD School B



5) Interactive and up-to-date version of File ID Number 22-0595

An up-to-date and interactive version of [File ID Number 22-0595](#) which:

- Includes explanations around the surplus, amount to be distributed from the surplus
- Includes a column with the 2022-2023 Eligible Carry Over amounts, if applicable, for each school
- Omits schools whose funding was revoked because of their middle school program closure
- Indicates any available 2022-2023 Total Funds (General + Surplus + Carryover) due to school closures
- Please split the Charter School category into OUSD Charter and ACOE Charter Schools
- The file should be sortable by the column headers
- All columns should have the ability to be hidden
- The “Increased Allocation Over One Pager” is not included in the “Total Site Allocation 2022-23” column. Should this be included? What is the “Increased Allocation Over One Pager?”
- Please create more complete column titles. For example, when stating the per pupil allocation please use a \$ sign and “per pupil” to note that it is a rate.
- A definition list for terms used in the document and the formula used for determining the per pupil allocation should be included
- Please provide totals for all columns where total values would make sense

6) A visual calendar with all past and future meeting dates and times

The Legislative Information Center does not list all future meetings for the the 2022-2023 school year. On the dashboard, we would like a calendar view of all meeting dates and their times.

Clarifying Questions

- 1) **Will the Superintendent of Middle Schools please provide guidance on what constitutes quality programming (including an overview of CA & OUSD curricular standards) in the five areas (art, music, world language, 5th to 6th grade student retention & positive school culture) funded by Measure G1?**
 - a) What are examples of successful programs in each area that have been implemented in OUSD?
 - b) What are examples of programs that have not produced the desired results in OUSD?
 - c) Are there any programs in these five areas outside of OUSD that are exemplary?

- 2) **May we have a presentation of the “Administrative Regulations for Allocation of Measure G1 Funds” so that the board of commissioners can have an opportunity for questions and discussion around our role in overseeing the disbursement of Measure G1 funds? We would like to discuss both the funding of middle school programs and teacher retention portion.**
 - a) In addition, are there any updates that need to be made to this document since its publication date?
E.g. The plan for the disbursement of carry over funds.

- 3) **School visits: Should we aim to visit all schools receiving G1 funding to observe the funding implementation? This is important since the sites have not been visited since Covid.**

Board Office Use: Legislative File Info.	
File ID Number	22-0595
Introduction Date	3-8-2022
Enactment Number	
Enactment Date	



Board Cover Memorandum

To Measure G1 Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission

From Middle School Network

Meeting Date March 8, 2022

Subject 2022-2023 Measure G1 Allocations

Ask of the Commission Approve the 2022-2023 Measure G1 Allocations.

Background The Middle School Network and staff are requesting that the 2022-2023 allocations be approved. The key goals of the grant is to retain school-site educators, Increase access to courses in arts, music, and world languages in grades 6-8, improve student retention during the transition from elementary to middle school and create a more positive and safe middle-school learning environment.

Discussion Middle School Network is open to questions from the commission regarding the 2022-2023 Measure G1 Allocations.

Fiscal Impact The total allocations to Middle Schools Charter and OUSD is not to exceed \$4,392,110.40. Resource: 9332 - Measure G1.

Attachment(s) Allocation spreadsheet attached.

Site	CALPADS Site Name	Status	Total Enrolled	enrollment 6-8th 2021-22 updated 1.22	20-21 UPP from DS CalPADS	Total School Enrollment	G1 Enrolled Gr6-8 LCFF 12.22.21	G1 updated enrollment 1.28.22	65% - Central OUSD to individual site charter for teacher pay	Site Allocations at lock-in (dec 22, 2021)	2022-23 Site Allocations as of 3.1.22
OUSD SCHOOLS											
210	Edna Brewer Middle	5273	770	770	46.67%	770	378	378	\$412,935.0	\$204,735.9	\$204,498.0
202	Elmhurst United Middle	5273	733	733	96.56%	733	712	712	\$393,093	\$385,640.2	\$385,192.0
215	Madison Park Academy 6-12	5273	724	284	94.96%	724	260	272	\$388,266	\$140,823.7	\$147,152.0
232	Coliseum College Prep Academy	5273	656	372	96.66%	656	349	361	\$351,799	\$189,028.7	\$195,301.0
235	Melrose Leadership Academy	5273	617	183	49.13%	617	113	98	\$330,884	\$61,204.1	\$53,018.0
211	Montera Middle	5273	615	615	54.34%	615	329	329	\$329,812	\$178,196.1	\$177,989.0
112	Greenleaf Elementary	5273	601	177	96.09%	601	169	169	\$322,304	\$91,535.4	\$91,429.0
212	Roosevelt Middle	5273	571	571	95.28%	571	540	540	\$306,215	\$292,479.9	\$292,140.0
206	Bret Harte Middle	5273	481	481	82.23%	481	405	405	\$257,950	\$219,359.9	\$219,105.0
201	Claremont Middle	5273	479	479	42.57%	479	197	197	\$256,878	\$106,701.0	\$106,577.0
335	LIFE Academy	5273	446	176	93.32%	446	170	165	\$239,180	\$92,077.0	\$89,265.0
228	United for Success Academy	5273	381	381	96.88%	381	371	371	\$204,322	\$200,944.5	\$200,711.0
121	La Escuelita Elementary	5273	378	93	93.67%	378	85	85	\$202,714	\$46,038.5	\$45,985.0
236	Urban Promise Academy	5273	371	371	95.25%	371	361	361	\$198,960	\$195,528.2	\$195,301.0
127	Hillcrest Elementary	5273	354	90	10.66%	354	11	11	\$189,843	\$5,957.9	\$5,951.0
219	Frick United Academy of Language	5273	316	316	96.74%	316	303	303	\$169,464	\$164,113.7	\$163,923.0
213	Westlake Middle	5273	277	277	91.12%	277	254	254	\$148,549	\$137,573.9	\$137,414.0
144	Parker Elementary	5273	227	78	96.89%	227	66	76	\$121,735	\$35,747.5	\$41,116.0
204	West Oakland Middle	5273	190	190	95.28%	190	179	179	\$101,893	\$96,951.7	\$96,839.0
333	Community Day	5273	9	9	89.47%	9	8	8	\$4,827	\$4,333.0	\$4,328.0
269	Community Day Middle	5273	3	3	0.00%	3	0	0	\$1,609	\$0.0	\$0.0
Charter Site	CHARTER SCHOOLS					20-21 Cal Pads Minh Co					
562	American Indian Public Charter			233	76.81	179			\$179,811.00	\$96,821.31	\$96,821.3
534	American Indian Public Charter II			218	80.88	176			\$177,149.62	\$95,388.25	\$95,388.3
185	ASCEND			166	91.40	152			\$152,439.27	\$82,082.68	\$82,082.7
505	Aspire Berkley Maynard Academy			159	74.91	119			\$119,668.40	\$64,436.83	\$64,436.8
549	Aspire Golden State College Preparatory Academy			234	90.09	211			\$211,804.42	\$114,048.53	\$114,048.5
587	Aspire Lionel Wilson College Preparatory Academy			198	88.80	176			\$176,652.88	\$95,120.78	\$95,120.8
504	Bay Area Technology			154	72.05	111			\$111,480.08	\$60,027.74	\$60,027.7
523	Downtown Charter Academy			271	79.03	214			\$215,180.96	\$115,866.67	\$115,866.7
524	East Bay Innovation Academy			311	33.06	103			\$103,301.31	\$55,623.78	\$55,623.8
544	Francophone Charter School of Oakland			41	32.93	14			\$13,564.95	\$7,304.20	\$7,304.2
537	KIPP Bridge Academy			192	83.97	161			\$161,982.45	\$87,221.32	\$87,221.3
574	Lighthouse Community Charter			215	91.20	196			\$197,004.38	\$106,079.28	\$106,079.3
526	Lodestar: A Lighthouse Community Charter Public			231	81.58	188			\$189,338.21	\$101,951.34	\$101,951.3
560	Oakland Charter Academy			245	92.51	227			\$227,717.99	\$122,617.38	\$122,617.4

589	Oakland Military Institute, College Preparatory Academy		203	78.83	160			\$160,779.30	\$86,573.47	\$86,573.5
581	Oakland School for the Arts		348	15.71	55			\$54,928.53	\$29,576.90	\$29,576.9
	Community School for Creative Education		70	81.93	57			\$57,621.37	\$31,026.89	\$31,026.9
	Envision		92	78.59	72			\$72,643.66	\$39,115.81	\$39,115.8
	Lazear		159	91.66	146			\$146,426.46	\$78,845.02	\$78,845.0
	Oakland Unity		110	88.98	98			\$98,339.42	\$52,952.00	\$52,952.0
	Urban Montessori		77	38.88	30			\$30,078.73	\$16,196.24	\$16,196.2
Total Allocations to Middle Schools Charter and OUSD										\$4,392,110.4
65% OUSD teacher allocation										\$4,807,728.90
65% Charter teacher allocation										\$2,594,471.10
1 % District										\$115,000.00
County Collection Fee										\$197,000.00
Total G1 Budget for 2022-23										\$12,106,310.45
Total Revenue for 2022-23										\$11,700,000.00
Surplus Spend										\$406,310.45

Administrative Regulations for Allocation of Measure G1 Funds

The Purpose of Measure G1

Oakland Unified School District's District-wide Teacher Retention and Middle School Improvement Act is established to pay for compensation for teachers and educational staff, as well as enriching the middle school curriculum that better prepares students for high school and beyond.

The Goals of Measure G1

- Attract and retain school-site educators.
- Increase access to courses in arts, music, and world languages in grades 6-8.
- Improve student retention during the transition from elementary to middle school.
- Create a more positive and safe middle-school learning environment.

Role of Oversight Commission

The Commission shall advise and report to the Board of Education and shall be responsible for oversight, which includes (a) oversight of proper allocation and use of all parcel tax monies, (b) reviewing annual independent audit reports, and (c) submitting recommendations to the Board of Education for any new or modified policies and administrative regulations to ensure the Oakland Unified School District's compliance with the requirements and intent of this Measure.

Use of Measure G1 Funds by OUSD Middle Schools

Measure G1 – Allowable and Unallowable Expenses:

Important note: G1 funds should be used to supplement, not supplant additional services, staff, programs or materials the site would not otherwise have within the following goal areas:

Goals	Examples of Allowable Expenses
Increase access to courses in arts, music, and world languages in grades 6-8	Staff (art, music, world language) Instruments Art supplies Language software and teaching aids Professional development
Improve student retention during the transition from elementary to middle school.	Staffing and other resources that will not supplant pre-existing services
Create a more positive and safe middle-school learning environment.	Staffing and other resources that will not supplant pre-existing services

Examples of Unallowable Expenses:

- Core Classroom teachers (**except art, music, or world language class**)
- Clerical Positions
- Copier Contract
- Medical Supplies
- Meals

NOTE: Pre-existing services, programs, staff or materials that meet the Measure G1 goals above, but have been previously funded using discretionary funds are NOT allowable G1 expenses.

Given the current fiscal challenges facing the State and District for school year 2020-21, the Commission will allow proposals to include requests to fully or partially fund pre-existing staff positions out of Measure G1. This only applies to positions previously being funded out of a different restricted budget category. Positions

previously funded from discretionary/general fund resources are not eligible to be funded through Measure G1 funds.

No Measure G1 funds can be used until a site's proposal has been recommended by the Measure G1 Commission for approval, and has been approved by the School Board. Likewise, no staff can be hired using Measure G1 funds until a site's proposal has been recommended by the Measure G1 Commission for approval, and has been approved by the School Board.

Sites must complete a diagnostic self-assessment of the school's curricular and safety needs, including an assessment of community demand for arts, music, and language education. Both school staff, and school community, must be engaged in the self-assessment process. These engagements must be documented and submitted with site proposals to the Commission as part of the approval process. Use of G1 funds should prioritize gaps in the categories identified as a result of the self-assessment process.

The following types of data must be provided as evidence along with the proposal for services and programs:

- Art - Self assessment
- Music - Self assessment
- World Language - Self assessment
- Elementary to Middle School retention - Enrollment data and analysis
- Safe and Positive School Culture - School Performance Framework data: URF, Suspensions, California Healthy Kids Survey (CHKS) data

Transition to 100% Funding Allocation in 2019-20

For the 2017-18 and 2018-19 school year, sites received 50% allocations of Measure G1 funding due to the parcel tax collection calendar. Due to the 50% allocation of Measure G1 funds, in the 2018-19 school year, sites may fund a portion of a Measure G1 approved staff position using Measure G1 funds and the remainder of the position using other site funds. In these instances, in the 2019-20 school year when the site will first receive 100% of the Measure G1 allocation, the site may request to the Measure G1 Commission and Board of Education that 100% of the position be funded using Measure G1 funds.

Unexpected Variance and Adjustments

If there is an unexpected variance in the estimated cost of a Measure G1 expenditure articulated in the proposed and approved plan, the site has the discretion to increase or reduce allocations of funds to expenditures by up to 15% above or below the allocation, provided those expenditures already exist in their approved plan, and that such a change does not exceed the total site allocation of funds. If such action is taken, sites must report these changes to the Measure G1 Commission by the following Measure G1 Commission convening. Sites may not adjust expenditures by more than 15%, nor change the purpose of an expenditure, without submitting an amended plan and community and staff engagement documentation reflecting Measure G1 discussions, to the Measure G1 Commission for approval.

Decisions to eliminate funding for existing services, staff, programs or materials in order to use Measure G1 funds are not allowable.

Measure G1 Funding Information

Measure G1 has two primary components: (1) pay raises for "school site educators" and (2) Middle School Grants designed to achieve the goals outlined above with clear accountability measures.

For the 2017-18 school year, OUSD middle schools and district charter schools will not receive funds for #1 above: pay raises for school site educators. For the 2017-18 school year, OUSD middle schools and district charter schools will receive 50% of the total estimated yearly allocation for #2 above: middle school grants. This will be calculated in the following way:

1. Estimated number of parcels (based on previous Measure N calculations)
2. Dollar amount per parcel
3. Total estimated parcel revenue based on number of parcels multiplied by dollar amount per parcel

Revised 05.12.2020

4. Subtraction of County collection fee
5. Subtraction of 1% administrative cost for District oversight to determine net estimated parcel tax revenue
6. Determine the percent of students enrolled in OUSD middle schools and percent enrolled in charter (adjusted by LCFF and residency percentage)
7. Allocate net revenue from step 5 to charter and district middle schools according to enrollment percentages in step 6.
8. Set aside 65% of totals in step 7 for school site educator pay raises.
9. Of 35% remaining for Middle School Grants, 50% will be allocated to OUSD middle schools and district charter schools based on projected 6-8 enrollment (adjusted by LCFF and Oakland residency). The remaining available funds (based on actual funds received) will be allocated the following school year. All charter schools that opt to use Measure G1 funds during 2017-18 are responsible for financing their Middle School Grants until the parcel tax funds are distributed. OUSD will not be responsible in any way for funding Middle School Grants for district school charter schools.

Once a reportable enrollment count occurs in the fall of 2017, and total tax revenues are collected in spring of 2018, a final calculation will be made to reconcile any discrepancies in the allocation to OUSD middle schools. The remaining balance of funds (approximately 50% of the total allocation, plus or minus any reconciliation) will be allocated for the 2018-19 school year. 2018-19 allocations will require each site to submit a proposal to the Measure G1 Commission for recommended approval by the Board of Education.

Thereafter, Measure G1 sites will receive 100% of their allocation (contingent on Commission recommendation and approval from the Board of Education). This will be based on the calculation at the end of the prior fiscal year when both payments of annual parcel tax revenues will have been received by the District (see payment distribution below). The G1 revenues will be allocated as follows:

Step One: District Receives PARCEL TAX REVENUES

Step Two: (Subtract 1% Administrative Fee for District Administration)

Step Three: Divide remaining Parcel Tax Revenues Proportionally:

a. TOTAL District Revenues:
Proportionate # of Oakland Middle School
Students adjusted by
Local Control Funding Formula & residency

b. TOTAL Charter Revenues:
Proportionate # of Oakland Middle School
Students adjusted by
Local Control Funding Formula & residency

Step Four: Divide Total District Revenues and Total Charter Revenues as Follows:

a. Divide Total District Revenues:
● 65% - School Site Educator raises
(*all get same percentage*)
● 35% - Middle School Grants
(*based on LCFF enrollment of Oakland students*)

b. Divide Total Charter Revenues:
* 65% - School Site Educator raises
(*all get same percentage*)
* 35% - Middle School Grants
(*based on LCFF enrollment of Oakland students*)

* Key Definitions:

- **Eligible students= students who are residents of the city of Oakland**
- **Projected LCFF Enrollment = CALPADS enrollment data from the prior year weighted by Unduplicated Pupil Percentage from the Local Control Funding Formula (LCFF)**
- **Confirmed LCFF Enrollment by School Type**

Revised 05.12.2020

- OUSD Middle Schools - **20 Day Count**
- OUSD Alternative Education Middle School - **Highest Reported Attendance from previous year**
- Charter schools - **First Attendance Report** that is submitted to the Office of Charter Schools during September

For Budget Planning purposes, sites should use the CALPADS counts of the prior year to do budget planning.

- Prior to **CALPADS** data release, school planning for budgeting should be based on the prior year “Confirmed Enrollment” or previous year’s CALPADS data. District or charters can use their local context and projections in order to identify the enrollment that will be used for instructional program development to do long term planning.

Calculation and Distribution of Measure G1 Funds to Site

All district and charter schools will be required to present a proposal to the Measure G1 Commission articulating their plan for use of the Measure G1 allocation for the following fiscal year. Disbursement of Measure G1 funds will require prior approval of said plan by the Measure G1 Commission and the Oakland School Board of Education. A draft template proposal is attached. Each proposal must contain accountability measures aligned to the Measure G1 goals. For each subsequent funding year, schools must report to the Measure G1 Commission the school’s measurement of success in achieving its Measure G1 goals based on its accountability standards.

If a site proposal is not approved by the Measure G1 Commission, the site will have an opportunity to revise and resubmit their proposal to the Commission based on a timeline determined by the Commission. Until a site’s proposal has been approved, no funds can be utilized by the site and no onboarding of staff using Measure G1 funds can occur.

Payment Distribution for 2019-20 and all years thereafter for the duration of the parcel tax will be based on CALPADS enrollment data for the previous fiscal year.

Funds will be distributed as follows:

- For OUSD middle schools:
 - OUSD Middle Schools will have their funding loaded into their Budget Development Tool for planning purposes and then loaded into the school budget in the 1st week of July.
 - Funds will be loaded into site budgets on July 1 of each year (contingent on approval by the Commission and Board of Education).
 - Each Measure G1 budgetary transaction (including transfers and purchase requisitions) will be reviewed and approved by the Middle School Network Office based on the current year’s Commission and Board of Education approved plan.
- For charter middle schools:
 - Approved expenditures will be subject to reimbursement at two points during the year;
 - mid-year following the mid-year reflection, and
 - end-of-year to capture expenses through June 30.
 - Each Measure G1 budgetary transaction will be reviewed and approved by the Middle School Network Office prior to reimbursement in accordance with the current year’s Commission and Board of Education approved plan.
 - Charter schools will request reimbursements via the Reimbursement Request Form during the two reimbursement windows. Supporting documentation will be required for all reimbursement requests.

Measure G1 Carry Over

Middle schools can request to rollover all unexpended Measure G1 budget allocations from one fiscal year to the next fiscal year, for a period not to exceed one consecutive fiscal year:

Due to school closures resulting from COVID-19 shelter in place mandates, the Commission recognizes that schools may not have been able to complete the actions planned and approved for the 2019-20 school year, including the spending of 2018-19 carryover funds. Because of this, the Commission will extend the one year carryover policy for 2018-19 carryover for two years. The 2018-19 carryover funds must be expended by the end of the 2020-21 school year, at which time unexpended funds will be moved to the contingency fund. The carryover request process will follow the usual carryover procedures articulated in these same administrative regulations.

If funds are to be carried over from one year to the next, sites must complete a "Carryover Justification" form. If a site's total potential carryover is \$5,000 or less, the site may complete a Carryover Justification SHORT form. If a site's full potential carryover is more than \$5,000, the site will need to complete a Carryover Justification LONG form *and provide community and staff engagement documentation reflecting Measure G1 discussions for the carryover funds*. If a site plan has not been previously submitted, the site will need to submit a long carry-over form regardless of the amount. Both forms will identify why the funds were not expended (barriers to progress) and identify a clear use of the funds in the next fiscal year that is linked to the Measure G1 outcomes and addresses the root causes or builds on the strategies that the school is hoping to leverage for change. Either completed Carryover Justification form will be presented to the Measure G1 Commission at the following commission meeting, where the Measure G1 Commission will vote on whether or not to recommend the request for approval by the Board of Education.

Carry Over Disbursement:

All unexpended Measure G1 budget allocations that are carried over from the previous year will be dispersed to the school based on previous year's allocations and must be aligned to the school's Measure G1 strategies or specifically target the root causes. Disbursement of carryover funds will occur in the fall of the target year, once the previous school years full Measure G1 revenue-to-allocation budget has been balanced, and all potential carryover funds have been verified.

In the fall sites will receive notice from the Middle School Network Office of carryover of funds which can be applied to the current school year. At that point, sites may choose to submit a Carryover Justification form. If a site chooses to submit a Carryover Justification form, either short or long, as specified above, and it is approved by Commission and Board of Education, the funds will rollover into the current year's G1 site balance. Any unexpended carryover funds at the end of the One-Year Education Improvement Plan cycle will be added into the Measure G1 "Contingency Fund." If a site chooses not to submit a Carryover Justification form, the unexpended funds will automatically be added to the Measure G1 Contingency Fund.

Measure G1 "Contingency Fund"

All Measure G1 revenue not allocated to schools and administration shall be held in reserve and maintained as a "Contingency Fund" that the Measure G1 Commission can recommend to the Board to support:

- Step-down funding due to the expiration of the Measure G1's 12 year term.
- Negative financial impact to middle schools based on rising or decreasing overall enrollment
- Measure G1 revenue shortfalls.
- Increases in funding based on changing middle school enrollment.

In addition, if recommended by the Measure G1 Commission and approved by the OUSD School Board these funds can be used to support:

- Multi-site innovative programs and pilots that will continue to better student outcomes and can be applied across the system or deepen the learning of Oakland's network of schools.
- Site visits

Administrative Funds:

The Measure G1 Administrative Funds will be used to support the development, implementation, and progress monitoring of Measure G1 strategies to ensure that the students in Oakland meet the goals of the initiative outlined above. The Middle School Network, will present a yearly report to the commission after the completion of the yearly audit explaining how the Administrative 1% were expended.

Audits

The District Middle Schools and Charters who receive funds shall have an annual, independent financial audit of the Measure G1 funds received and expended.

Measure G1 requires OUSD to secure an independent financial auditor to prepare an audit report comprised of independent audits from OUSD and all charter schools receiving Measure G1 funds. Under the statute, the audit report must be reviewed by the Commission and filed with the Board prior to December 31st. In order to meet this deadline, **all schools (OUSD and charter) must complete and submit their completed audit to the Commission or designee by November 1st.**

The audit should describe the programs funded by the Measures revenues, schools' success in achieving Measure G1 goals based on their accountability measures, and render an opinion as to whether the funds expended were for allowable uses under the Measure and whether the revenues were used to supplement and not supplant general fund revenues. The cost of the Independent Audit may be paid from the proceeds of the parcel tax.

Failure to submit an audit within the prescribed timeline of completion and filing, may jeopardize the ability to be reimbursed for expenses at the mid or end of year, and furthermore could make a site ineligible in the following year's allocation process. Failure to submit a completed audit to the commission by March 30 will result in the denial of all reimbursements and staff compensation funds for the current year. This is true for both charter and district schools.

Defining Key Goals:

- Improve student retention during the transition from elementary to middle school

This goal shall refer to any effort to attract and sustain the enrollment of elementary school students from feeder schools into an Oakland public middle school program so that their families do not opt out and enroll their student into a private school in Oakland or any school outside of Oakland. The goal is to increase enrollment overall in Oakland public middle schools and not to intentionally recruit students away from other Oakland public middle schools.

Examples include, but are not limited to:

- a. Parent and student outreach
- b. Site-visit field trips
- c. Transitional programs (Summer Bridge)
- d. Data-based research
- e. Cross-school collaboration
- f. Partnerships with feeder schools

CHARTER SCHOOL SALARY DEFINITIONS AND PROCESS

I. Definitions

1. "School Site Educators"

With regards to charter schools, 'school site educators' refers to any union-represented employees and/or to any school employees who, in a given school year, spends at least 75% of their assignment at the site of the Oakland

charter school employer. Part-time or hourly employees who work at an Oakland charter school during the regular work year (e.g., substitute staff, after school staff) qualify as school site educators.

Example 1:

Jen's duties are split between teaching at ABC charter school in Oakland and serving an administrative role in ABC's business office off-site, with roughly 80% of her time spent teaching. Jen qualifies as a School Site Educator.

Example 2:

Bill is a part-time teacher (0.5 FTE) at a charter school in Oakland. Bill qualifies as a School Site Educator because his assignment is fully located at the school site.

Example 3:

Jane is an independent contractor who is hired by an Oakland charter school to provide counseling. Jane does not qualify as a School Site Educator because she is not an employee of the school.

2. "Same Percentage Increase"

The salary increase among each charter school employer shall be the same percentage for all its employees.

Example 4:

Charter School Employer employs 30 school-site educators at Charter School A. All 30 shall receive bonuses at the same percentage increase.

Example 5:

Charter School Employer employs 20 school site educators at Charter School A and 50 school site educators at Charter School B. All 70 school site educators shall receive bonuses at the same percentage increase.

II. Process

- 1. Distribution.** G1 salary increases to charter school site educators will commence with the 2018-19 school year. The charter school's Chief Financial Officer, or appropriate charter school administrator, must submit a completed and signed *Measure G1 Certification Form and Roster in late April/early May* annually to receive funds for salary increases, *exact date to be determined*, Additionally, an *Acknowledgement of Receipt* must be completed by the charter school administrator at the time of receipt. Charter school employers must distribute the salary increase to employees at the end of each school year between June 1 and June 30.

Schools that have not submitted their documentation by the deadline will receive a warning and will be reported at the Measure G1 Commission meeting at the end of May. Failure to submit the Measure G1 Certification Form and Roster will result in a delay in disbursement of funds until Fall closing of prior year's books (usually October), thereby missing the June 30th deadline to distribute the salary increase to employees. Public notice of all sites that have failed to submit documentation by the deadline will also be given to the Board at the first Board meeting in August.

- 2. Eligibility.** All employees of an Oakland charter school employer who are employed on the last day of the school year are eligible for the salary increase.

Example 6:

Alice qualifies as a site-based educator in an Oakland charter school. She joined the school in January. She would be eligible to receive a G1 salary increase provided she worked for the school on the last workday of school year.

Example 7:

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Eric qualifies as a site-based educator in an Oakland charter school; however, he quit in February. He would not be eligible to receive the salary increase.

- Calculations.** The salary increase shall be distributed at the same percentage for all employees of an Oakland based charter school employer based on their salary and salary driven benefits earned for the school year. "Salary" as used herein refers to an employee's combined scheduled income and any stipends. "Salary driven benefits" as used herein refers to all statutory and policy-driven benefits which may result in additional cost associated with the increase. For example, if the salary increase would qualify as pensionable earnings for an employee, employers may include employer retirement contributions as part of the salary increase calculation and use G1 salary revenue for that purpose.

Example 8:

Tara qualifies as a site-based educator in an Oakland charter school. She receives a base salary, as well as a bilingual stipend and a laptop. Her Total Actual Salary consists of her base salary and the bilingual stipend. The value of her laptop is not included.

Example 9:

Mary was out sick for May and June but was still employed as of the last workday of the school year. Her earnings while on sick leave count towards her Total Actual Salary.

- Audit.** Charter school employers must provide supporting documentation to any auditors working on behalf of the G1 Commission.