



# Measure N Permissible Expenses [Draft]

2019-20

## The Purpose of Measure N

The Oakland College & Career Readiness For All Act is established to pay for the implementation of a comprehensive approach to high school education in Oakland that integrates challenging academics with career-based learning and real-world work experiences. **This comprehensive approach creates small learning communities of career-oriented pathways**, and offers intensive, individualized support to create the conditions for all students to graduate high school prepared to succeed in college and career.

## The Goals of Measure N

The following goals are to be met through the implementation of quality career pathways:

- Decrease the high school dropout rate
- Increase the high school graduation rate
- Increase high school students' readiness to succeed in college and career
- Increase middle school students' successful transition to high school
- Reduce disparities in student achievement and student access to career pathways based on race, ethnicity, gender, socioeconomic status, English Learner-status, special needs status, and residency

## Permissible Uses of Measure N

Measure N proceeds shall be spent on the following school programs and lead to the integration of the four pillars of Linked Learning:

- To **increase support** for students in college preparatory courses in every high school to ensure **students (meet A-G)** are qualified for admission to the University of California and other 4-year university systems, and **are prepared to succeed in college**
- To provide **work-based learning** in every high school, including **career exploration, career technical education courses, job shadowing, internships, and job certifications**
- To **reduce the dropout rate** by providing **counseling, tutoring, mentoring and other intensive support services** to students in danger of not graduating high school
- To provide programs to students **transitioning from 8th to 9th** grade to prepare them to succeed in high school, and to students **transitioning from 12th grade** to college **prepare them for admission and success in college**

## Terminology:

Measure N refers to Linked Learning "academies." Throughout this document, the High School Linked Learning Office uses the term "pathways" in lieu of "academies."



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## Permissible Expenses if site:

- ✓ Has a plan and budget approved by Measure N Commission and Governing Board
- ✓ is developing Career Academy structure as a school or within a large school.
- ✓ Has strategic investments in each of the 4 Pillars (Rigorous Academics, Career Technical Education, Work Based Learning, Integrated student supports)
- ✓ Supplemental to the base program prior to receiving Measure N Funds (not **supplanting** see definition below)
- ✓ Specific goals to decreasing academic outcome disparities for students not succeeding in school.

## The following criteria

Focal Areas	Metrics	Permissible Expenses (some examples of expenses)
<p style="text-align: center;">Enabling Conditions</p>	<p style="text-align: center;">Students participate in career academies that are designed to support the 4 Pillars of Linked Learning?</p>	<ul style="list-style-type: none"> <li>● <b>Pathway coaches, leadership coaching, or consultant contracts</b> to build career academy understanding and implement key instructional practices within the career pathway</li> <li>● <b>Leadership, teacher and stakeholder retreats</b> to strategically plan pathway development and implementation <b>outside of daily work schedule (agenda required)</b></li> <li>● <b>Supporting pathway structures by staffing</b> above the base allocation/historical staffing that support integrity to pathway programs (must have <b>duty statements</b> for general positions such as AP's, TSAs, counseling, etc. assigned to specific pathways, or teaching positions that allow for pathway student and teacher cohorting).</li> <li>● <b>Master scheduling</b> supports to redesign school schedule to support pathways</li> <li>● Promotional materials (brochures, banners, etc) that highlight <b>pathway recruitment and pathway identity.</b></li> <li>● <b>Travel expenses, registration</b> for Linked Learning <b>conferences (CTE, Work-Based Learning, Pathway-Aligned Rigorous Academics, Comprehensive Student Supports (pathway-aligned counseling, interventions, etc.)),</b> site visits, and professional development.</li> <li>● <b>Extended Contracts to pay for planning meetings</b> to address pathway designs or pathway inquiry outside of daily work schedule</li> <li>● <b>Consultants</b> to build out programmatic elements to support career pathways</li> <li>● <b>.2 FTE Clerical FTE/ET/OT</b> per 300 students above historical allocation to support redesign of instructional programming identified in the EIP</li> </ul>
<p style="text-align: center;">College Readiness</p>	<p style="text-align: center;">Increase in A-G rates for all students and reduce the disproportionality for students that are historically struggling to transition to college?</p>	<ul style="list-style-type: none"> <li>● <b>Teachers' salaries and benefits</b> for shifts in academic program to provide new Linked Learning programmatic elements, student supports, CTE or acceleration</li> <li>● <b>Teacher FTE</b> required to shift to 8- period day to support credit recovery, CTE integration, and student acceleration to improve graduation rates.</li> <li>● <b>Stipends for teachers to implement curriculum, develop new curriculum and projects, collaboration, planning,</b> etc. specifically for pathway development <b>outside of daily work schedule</b></li> <li>● Dual &amp; concurrent enrollment courses, materials, and transportations fees, and books</li> <li>● Transportation fees, admission fees, food for trip and substitute coverage for college visit colleges</li> <li>● TSA to provide coaching and instructional supports of pathway and CTE teachers</li> <li>● Supplement summer school staffing and credit recovery strategies that increase the # of students that will meet A-G requirements <i>and who will access pathway</i></li> <li>● Staff or partnerships to provide pathway-aligned guidance and transition support to college (e.g., Dual Enrollment, College and Job Applications, etc.)</li> </ul>



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<p>Work Based Learning CTE Course Development</p>	<p>Student completion of CTE course sequences with quality</p>	<ul style="list-style-type: none"> <li>Staffing positions that support the development of CTE and work based learning systems and supports for students (e.g. TSAs, WBLLs, CTE teachers, Internship/WEE teachers, etc.). [Duty statement required for existing titles]</li> <li>Student transportation costs for WBL Activities (BART, AC Transit, Bus rentals). [Site must collect WBL data ]</li> <li>Admission fees for access to pathway related institutions (eg. Exploratorium Admission for Engineering Pathways, etc)</li> <li>Project Based Learning training or stipends for teachers to support the integration of CTE standards and real world tasks into the instructional core.</li> <li>Equipment, curriculum, specialized supplies, and materials for integrated projects that are aligned to pathway CTE sequence and WBL</li> <li>Food, materials, equipment and supplies for industry related engagements, CTE and WBL</li> <li>Facilities rentals for WBL events or public demonstrations of mastery.</li> <li>Lodging, food, dues, individual transportation for Career Technical Student Organizations (in-state or out-of-state) and participation in events.</li> <li>Student stipends for participating in internships (<b>Cannot exceed 10% of total school's measure N allotment</b>) through consultant contracts to support student stipends.</li> <li>Consultant contracts to support with the implementation of CTE and WBL.</li> <li>Sub coverage to allow for teacher participation in WBL activities (including STIP subs at large schools)</li> <li>STIP sub (large school only) to serve as chaperone for high volumes of off campus career exploration activities</li> <li>Extended Time (ET/OT) for classified staff that work beyond the normal school day with WBL</li> </ul>
<p>Intensive Student Supports</p>		<ul style="list-style-type: none"> <li>Costs associated with team building and community building exercises to and trips to promote collective supports for students.</li> <li>Extended Time (ET/OT) for classified or certificated staff that work beyond the normal school day with tutoring, home visits, etc.</li> <li>Counseling and other intensive support services to students in danger of not graduating high school (must be supplemental to established base programming)</li> <li>Tutoring, mentoring and case management staffing to support students that are off track for graduation (includes teacher FTE or extended contracts or additional staffing)</li> <li>Staffing (mentoring, tutoring, case management) to enable full access for all students to pathway experience</li> <li>Tutoring to develop and support literacy and language skills for students who are one or more years below grade level in SRI/reading as a means to graduating high school and staying on-track.</li> <li>Tutoring to support students who need additional math supports to access specific pathways that require more math skills beyond core courses (e.g. Engineering, Computer Science, Architecture, etc.) as a means to graduating high school and staying on-track.</li> <li>Teacher pay to lead pathway-aligned Advisory periods dedicated to the above activities</li> <li>Consultant contracts for any of the above.</li> </ul>
<p>Grade Level Transitions 8th-9th 12th-Postsecondary</p>		<ul style="list-style-type: none"> <li>Targeted summer bridge programs to support successful transition from 8th-9th grade</li> <li>Materials and supplies for team building activities for pathway retreats for incoming students.</li> <li>Summer bridge programs designed to decrease summer melt for graduating seniors.</li> <li>Tracking systems that support communication with graduating seniors that allow school sites to collect data on graduates.</li> <li>Staffing to support post-secondary transitions</li> </ul>



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## Special Guidelines on Expenditures [For Conversation with Commission]

Supplies		<ul style="list-style-type: none"> <li>• Supplies and materials that support CTE-aligned and differentiated projects for diverse learners in pathway classes</li> <li>• [Should there be a limit and how do you determine if not supplanting?]</li> </ul>
Food		<ul style="list-style-type: none"> <li>• For industry partners</li> <li>• For students during WBL experiences</li> <li>• For students and staff on pathway retreats</li> <li>• Caps on Food:</li> </ul>
CTE Facilities and Furniture		<ul style="list-style-type: none"> <li>• CTE facilities classroom upgrades that are required to meet industry standards of the CTE sequence. Security, minor facilities upgrades or furniture that specifically supports the CTE classes can be approved with prior approval if the site can demonstrate a clear need.</li> <li>• Facilities upgrades to support pathway-contiguous space (including decoration and moving costs) for multiple pathway schools.</li> <li>• Infrastructure required to support security of CTE equipment and technology or other expensive equipment purchased by Measure N</li> </ul>
Technology		<ul style="list-style-type: none"> <li>• Technology purchases can me made for materials that are directly used by students to build the pathway</li> <li>• Technology purchases cannot exceed \$25,000 per pathway per year without approval of the Measure N Commission unless the technology purchases directly support the CTE industry sector (ie Computers for Digital Animation, etc)</li> <li>• Infrastructure to support pathway-aligned technology</li> </ul>
Apparel		<ul style="list-style-type: none"> <li>• Clothing, uniforms and apparel that is required to meet CTE focus of pathway.             <ul style="list-style-type: none"> <li>◦ Example: Scrubs for Health Pathway, Chef’s hat for culinary arts, etc.</li> </ul> </li> <li>• Professional dress or pathway shirts that allow students to meet professional standards and access internship (Cannot be school uniform) and must be approved by Measure N team in advance by submitting design and purpose.</li> <li>• All Apparel purchased with Measure N Funds must have the logo “Supported by Measure N” on the sleeve of the garment or in a place that is visible.</li> <li>• Should pathways be able to purchase shirts that help establish the pathway identity?</li> </ul>



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## Examples of Non-Permissible Expenses

### Non-Permissible Expenses (some examples of expenses)

1. Standard classroom consumable supplies, except those required to provide additional services to special population students or are beyond the core program
2. Principal, Head of School and Director Positions that are not supplemental to the base allocation by the district or charter organization.
3. Contingency or “petty cash” funds
4. Contributions and donations
5. Dues/memberships to professional organizations or societies that are not related to Linked Learning or college and career pathways development.
6. Equipment and supplies for building maintenance except those spelled out in “Special Guidelines” related to facilities and technology above.
7. Fines and penalties
8. Standard classroom furniture, files, and equipment not specific and unique to the instructional program (tables, chairs, desks, general storage, whiteboards, etc.) or used by the teacher (Overhead, LCD projectors, laptops, iPads, Nooks etc.) General storage files or cabinets not designed to store specific tools or equipment
9. Gifts, door prizes, etc.
10. Instructional aids, uniforms, tools, laptops or other items to be used by a limited number of students or retained by students
11. Interest and other financial costs
12. Maintenance contracts or agreements
13. Excessive installation or security costs for equipment purchased with Measure N funds
14. Food costs other than those specifically allowed in “Special Guidelines” above.
15. Student tuition costs or university fees
16. Purchase or lease of passenger vehicles including vehicles such as automobiles, trucks, buses, utility vehicles, airplanes, boats, and golf carts
17. Purchasing, constructing, renovating or remodeling facilities other than for the purposes laid out in the “special guidelines” section.
18. Costs of advertising and public relations designed to solely promote the LEA or the school. Advertising cost can be linked directly to outreach for pathways.
19. Insurance/Self-Insurance except in the case of specific industry requirements to cover students while on work based learning above the basic level of coverage that the school district/charter organization provides students.
20. Audits, except single audit
21. Expenses that supplant as stated explicitly in the Measure
22. Alcohol
23. Fundraising fees, consultants, or specific staffing
24. Others, as evaluated on a case-by-case basis
25. Indirect costs
26. Meeting refreshments, stipends, and other associated costs for required meetings such as:
  - a. SSC meetings
  - b. Leadership meetings held within the regularly scheduled work day
  - c. School-wide professional development held within the regularly scheduled work day
  - d. Core meetings held within the regularly schedule work day
27. Graduation ceremonial services including but not limited to renting facilities, programs, cap and gowns, diplomas, and photography
28. Printers, Copiers, Copier Maintenance, Copier Service Agreements, Copier Supplies for non CTE related issues



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29. Internet, Telephone, Fax, or Cable Services including but not limited to technical consultants and/or support
30. Uniforms or other non-approved clothing except those listed in the “Special Guidelines” section.
31. Athletic equipment and associated athletic costs except for schools with an explicit and stated sports medicine, athletic training, or health pathway. Health pathways must have a clear unit of study and program of study that incorporates athletics.
32. DJ and/or other forms of entertainment that that are not directly related to the pathway theme and integrated into the course of study.
33. Costs associated with AP testing or SAT and ACT testing
34. Cost of teacher salaries for AP classes that are stand alone courses and not integrated into a 3 CTE course sequence
35. Others, as evaluated on a case-by-case basis. List is not complete or exhaustive – please contact Measure N Staff for additional information.



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## Information regarding the Conditions for Specific Permissible Expenses:

*\*Please note the following expenses must follow OUSD District policy requiring 30 day pre-approval, documents must be submitted to Nancy Gomez.*

### *School Site Visits*

Although school site visits are an allowable expense, schools that are interested in using Measure N funds for school site visits must ensure that school site visits are for teams to learn about best practices or potential planning activities for student supports, student engagement for specific target populations, specific pathway interest, or deeper learning of key pathway components. School site visits must support the deeper learning to better address quality pathway development. Measure N funds can be allocated for travel costs, stipends for staff to attend site visit, and lodging if necessary. School site visits should not have previously been funded from other sources.

### *Certificated Extended Contracts or Stipends*

Certificated extended contracts or stipends are an allowable expense and can be allocated for teachers who are tasked with responsibilities such as developing pathway curriculum, collaboration time, piloting programs and/or student support services that teachers have not been tasked with before. Although certificated extended contracts are an allowable expense, the *key criteria* is that these tasks and activities must be different than what has been offered before to students, must be different than what teachers have been tasked with before, and must provide deeper learning to better address the development of the pathway instructional core, pathway program of study, and overall pathway development. Services provided by teachers should not have previously been funded from other district funds.

### *Meetings/Professional Development on site*

Providing refreshments and compensation for staff to attend meetings is an allowable expense and can be allocated for meetings that support developing pathway curriculum, collaboration time, student and family engagement, and industry partner engagement. Although refreshments and stipends for meetings are an allowable expense, the *key criteria* is that these meetings must provide deeper learning and planning to better address the development of the pathway instructional core, development of pathway program of study, and overall pathway development. These meetings should be be agendized, have recorded minutes, and should not be meetings previously funded from other sources, meetings that have been required previously, or meetings that are scheduled within regular daily work schedule.

- Compensation will be paid as “Participation in Approved Professional Development Programs/Meetings” at the pay rate of \$18.34 as stated in OUSD Board policy
- Refreshment cost at a maximum not to exceed \$75 per meeting
- Refreshments and compensation are non-permissible expenses for the following meetings: standing leadership meetings, SSC meetings, standing professional development, department meetings, and other core meetings scheduled within daily work schedule

### *Conferences and Retreats*

Measure N funds can be used to support the travel, lodging, and fees for school leadership and staff to attend conferences and other opportunities for professional development. Although this is an allowable expense, the key criteria is that conferences and professional development opportunities attended must be different than what has been offered before and must provide deeper learning to better address the development of the pathway





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instructional core, pathway program of study, and overall pathway development. The professional development and/or conference should not have previously been funded from other sources or have been required previously.

- Conferences include travel, lodging, and meals at a maximum not to exceed \$40 per person per day as stipulated by OUSD Board policy
- Retreats include travel, lodging, and meals at a maximum not to exceed \$40 per person per day as stipulated by OUSD Board policy

### *Field Trips*

Field Trips are an allowable expense and can be allocated for field trips that support pathway curriculum and projects, project-based learning, pre-pathway exposure, work-based learning, CTE courses and coursework, and the Work-Based Learning continuum. Funds can be used to cover buses, entrance fees, and admission fees. Out of state field trips are an allowable expense with the key criteria that the field trip must be an integrated part of the pathway instructional core and pathway curriculum. Funds can be used to cover the travel and lodging for students and staff for out of state field trips. Although field trips are an allowable expense, the *key criteria* is that these field trips must be different than what has been offered to students before and must provide deeper learning to better support the development of the pathway instructional core, pathway program of study, and contextualized learning for students. The field trips should not have previously been funded from other sources.

### *Supplies and Materials*

Supplies and materials are an allowable expense and can be allocated for supplies and materials needed for project-based learning, pathway curriculum and projects, CTE courses and coursework, Dual Enrollment courses, and the Work-Based Learning continuum. Although supplies and materials are allowable expenses, the *key criteria* is that these supplies and materials must be for opportunities that are different than what has been offered to students before and must provide deeper learning to better support the development of the pathway instructional core, pathway program of study, and contextualized learning for students. Supplies should not have previously been funded from other sources and must be supplemental.





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## Documents Required for Submission - OUSD District Schools

Please submit to Nancy Gomez for pre-approval. Please keep a copy at your site for your records for auditing purposes:

Permissible Expenses	Document Required	Notes / Instructions
<b>School Site Visits</b> (that require travel)	<ul style="list-style-type: none"> <li>● Travel Request Pre-Approval Form               <ul style="list-style-type: none"> <li>● Agenda / Itinerary</li> <li>● Transportation Confirmation &amp; Invoice</li> <li>● Hotel Confirmation &amp; Invoice</li> <li>● Other Anticipated Expenses (Meals/Taxi/Bridge Tolls): Original Itemized Receipts Required*1</li> </ul> </li> <li>● Justification Form</li> <li>● Travel Expense Report*2</li> </ul>	<p>1*Credit card transaction receipts are not allowed in place of an itemized receipt.</p> <p>Bank statements can be included to support the purchase, but cannot replace the receipt.</p> <p>2* Only required when an employee is submitting receipts for reimbursement.</p> <p>2*All employee reimbursement requests must be submitted no later than 60 days after the original receipt date and within the current fiscal year.</p> <p>After 60 days = automatic rejection from A.P.</p>
<b>Conferences</b> (that require travel)	<ul style="list-style-type: none"> <li>● Travel Request Pre-Approval Form               <ul style="list-style-type: none"> <li>● Conference Registration Form &amp; Itinerary</li> <li>● Transportation Confirmation &amp; Invoice</li> <li>● Hotel Confirmation &amp; Invoice</li> <li>● Other Anticipated Expenses (Meals/Taxi/Bridge Tolls): Original Itemized Receipts Required*1</li> </ul> </li> <li>● Justification Form</li> <li>● Travel Conference Request Payment Form*2</li> <li>● Travel Expense Report*3</li> </ul>	<p>1*Credit card transaction receipts are not allowed in place of an itemized receipt.</p> <p>Bank statements can be included to support the purchase, but cannot replace the receipt.</p> <p>2*Required in order for AP to pay the Vendor's invoice.</p> <p>3* Only required when an employee is submitting receipts for reimbursement.</p> <p>3*All employee reimbursement requests must be submitted no later than 60 days after the original receipt date and within the current fiscal year.</p> <p>After 60 days = automatic rejection from A.P.</p>
<b>Staff Retreats</b> (off-site that require travel/lodging)	<ul style="list-style-type: none"> <li>● Travel Request Pre-Approval Form               <ul style="list-style-type: none"> <li>● Venue Registration Form</li> <li>● Agenda &amp; Sign-in Sheet</li> </ul> </li> </ul>	<p>1*Credit card transaction receipts are not allowed in place of an itemized receipt.</p>



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	<ul style="list-style-type: none"> <li>Transportation - Mileage: attach a MapQuest print-out to confirm the total number of miles</li> <li>Hotel Lodging Confirmation &amp; Invoice</li> <li>Other Anticipated Expenses (Meals/Taxi/Bridge Toll): Original Itemized Receipts Required*1</li> <li>Justification Form</li> <li>Travel Conference Request Payment Form*2</li> <li>Travel Expense Report*3</li> </ul>	<p>Bank statements can be included to support the purchase, but cannot replace the receipt.</p> <p>2*Required in order for AP to pay the Vendor's invoice.</p> <p>3* Only required when an employee is submitting receipts for reimbursement.</p> <p>3*All employee reimbursement requests must be submitted no later than 60 days after the original receipt date and within the current fiscal year.</p> <p>After 60 days = automatic rejection from A.P.</p>
<p><b>Meetings:</b> Professional Development or school events on Site</p>	<ul style="list-style-type: none"> <li>Pre-Approval Form for Special Event &amp; Activities               <ul style="list-style-type: none"> <li>Facility Rental Agreement</li> <li>Venue or Vendor Invoice*1</li> <li>Original Itemized Receipts Required*2</li> </ul> </li> <li>Justification Form</li> <li>Agenda &amp; Sign-in Sheet</li> </ul>	<p>1*No hand-written order forms or receipts Must be in an invoice template.</p> <p>2*Credit card transaction receipts are not allowed in place of an itemized receipt.</p> <p>Bank statements can be included to support the purchase, but cannot replace the receipt.</p>
<p><b>Extra Pay for Certificated Employees</b></p>	<ul style="list-style-type: none"> <li>Extended Contract*1</li> <li>Paid Inservice Program &amp; Projects and Curriculum Development Activities Form*2</li> <li>Stipend Request Form*3</li> </ul>	<p>1-3*Thoroughly filled out - please answer all fields and confirm the hourly rate with your administrator.</p> <p>*Provide details depending on the form used; Services to be provided, Accomplishment Standards, Justification and/or Purpose of Program or Stipend.</p>
<p><b>Field Trips</b> (using Measure N funds only)</p>	<ul style="list-style-type: none"> <li>Field trip packet</li> <li>Justification form</li> </ul>	<p>*Thoroughly filled out - especially the budget information.</p>
<p><b>Supplies and Materials</b></p>	<ul style="list-style-type: none"> <li>Justification entered into ESCAPE for supplies that might be considered supplanting.</li> </ul>	



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### Documents Required for Submission - Charter Schools

Please submit to Nancy Gomez as supporting documentation with quarterly expenditure reports and please keep a copy for your records for auditing purposes:

Permissible Expenses	Document Required
School Site Visits	<ul style="list-style-type: none"><li>● Itinerary, lodging confirmation, and flight confirmation</li><li>● Receipts that accumulate to amount spent</li><li>● Justification Form</li></ul>
Certificated Extended Contracts	<ul style="list-style-type: none"><li>● Document that captures the agreement of extra service being provided by staff member</li><li>● Justification Form</li></ul>
Meetings, Professional Development or school events on Site	<ul style="list-style-type: none"><li>● Agenda and sign-in sheets</li><li>● Receipts that accumulate to amount spent</li><li>● Justification Form</li></ul>
Conferences and Retreats	<ul style="list-style-type: none"><li>● Itinerary or Agenda</li><li>● Lodging confirmation and flight confirmation</li><li>● Receipts that accumulate to amount spent</li><li>● Justification Form</li></ul>
Field Trips	<ul style="list-style-type: none"><li>● Receipts that accumulate to amount spent</li><li>● Justification Form</li></ul>
Supplies and Materials	<ul style="list-style-type: none"><li>● Receipts that accumulate to amount spent</li><li>● Justification Form</li></ul>