



# BALLOT MEASURE SUBMITTAL FORM

Official Use Only Date Stamp

Jurisdiction Name:

Election Date:

## BALLOT TITLE & QUESTION TO BE PRINTED

**Note:** The information as it appears within the text boxes will be printed on the ballot. The 75 word count limit begins in the ballot title (if a title is provided); otherwise, the count begins in the ballot question.

Insert Ballot Title here (if applicable):

Insert Ballot Question here:

"To provide a districtwide educator salary increase designed to attract/retain teachers; provide enhanced middle school art, music, languages/other programs in addition to core educational programs; improve academic achievement; provide safe, positive schools, and prepare students for college/careers; shall Oakland Unified School District levy a tax of \$120 per parcel, providing \$12.4 million annually, for 12 years, with exemptions for senior and low income residents, no money for Sacramento, and all money benefitting Oakland students?"

[74 Words]

### TYPE OF MEASURE

### PERCENTAGE NEEDED TO PASS

Regular Measure     Parcel Tax  
 Bond Measure     Charter Amendment

50% + 1     66.6667%     2/3  
 Other:

### FULL TEXT OPTION

Full Text to be printed in the Voter Information Pamphlet:

**YES** (note: must submit separate copy of Full Text along with this form)

**NO** – A Full Text was not submitted

**NO** – Do not print, but it's available to the public at: \_\_\_\_\_

### AUTHORIZED REPRESENTATIVE

The authorized representative/contact person should be the person who will be receiving the typeset proofs

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### CONTACT INFORMATION (for office use)

Phone #: \_\_\_\_\_

### CONTACT INFORMATION (for public)

Phone #: 510/879-8199

E-Mail: \_\_\_\_\_

E-Mail: boe@ousd.org

Website: <http://www.ousd.org>

## COUNTY COUNSEL'S IMPARTIAL ANALYSIS OF MEASURE G1

### ANALYSIS BY THE ALAMEDA COUNTY COUNSEL OF AN OAKLAND UNIFIED SCHOOL DISTRICT SPECIAL PARCEL TAX MEASURE

Measure G1, an Oakland Unified School District ("District") special parcel tax measure, seeks voter approval to authorize the District to levy a twelve-year special parcel tax in the amount of \$120 per year on each parcel of taxable real property within the District beginning July 1, 2017, to fund the programs set forth in the measure.

A school district has the authority to levy special taxes upon approval by two-thirds of the votes cast on the special tax proposal. (See Cal. Const. Art. XIII A, § 4; Art. XIII C, §2; Cal. Gov't Code §§ 50075-50077, 50079, & 53722, et seq.)

If two-thirds of the qualified electors voting on this measure vote for approval, the funding revenue is to be used for the specific purposes set forth in the full text of the measure printed in this sample ballot. The measure allocates 1% of total revenues from the special tax to administrative overhead costs for the administration of the measure. The measure allocates some of the revenues to the charter schools within the District under the formula outlined in the measure ("charter revenue"). The remaining amounts go to the district ("district revenue"). The charter revenue and district revenue amounts are allocated as follows: 65% of the tax proceeds to attract and retain school site educators by providing salary raises to said educators and 35% of the tax proceeds to support education programs at the middle schools. The measure further provides that the monies collected shall be accounted for separately and shall be expended only for those specified purposes.

An oversight commission will report to the District's Board and provide oversight of the proper allocation and use of the tax proceeds. An independent auditor will also report annually on the amounts collected, the amounts expended, the programs funded, and whether the tax proceeds were expended for allowable uses.

If the measure passes, the tax will be collected by the Alameda County Treasurer-Tax Collector at the same time and in the same manner as *ad valorem* property taxes are collected. Upon application to the District, an exemption may be granted to low-income owners of single family residential units. To qualify for the low-income exemption, such owners must reside in the single family residential units and demonstrate for each year that their combined family income from all sources for the previous calendar year is at or below the income level qualifying as "very low income" for a family of such size under federal law. A senior citizen exemption is also available for any parcel owned and occupied by a person 65 years of age or older upon application to the District.

If two-thirds of the qualified electors voting on this measure do not vote for approval, the measure will fail, and the District will not be authorized to levy the special tax.

This measure is placed on the ballot by the governing board of the District.

DONNA R. ZIEGLER  
County Counsel

The above statement is an impartial analysis of Measure G1, which measure is printed in full in this sample ballot pamphlet. If you desire an additional copy of the measure, please call the Elections Official's office at (510) 272-6933, and a copy will be mailed at no cost to you. You may also access the full text of the measure on the Alameda County website at the following address: [www.acgov.org/rov](http://www.acgov.org/rov).

## ARGUMENT IN FAVOR OF MEASURE \_\_

Vote **YES on G1** -- Keep Teachers and School Educational Staff in OAKLAND!

Oakland's teachers are among the lowest paid in the Bay Area. We're experiencing the worst teacher shortage in California. It's more important than ever to be able to recruit and retain quality teachers, school educational staff, and provide middle school enrichment in Oakland schools!

**YES on G1** pays Oakland teachers and school educational staff -- including classroom assistants, clerical and maintenance workers -- more money so they can choose to live in Oakland, where they work.

**YES on G1** expands learning opportunities for Oakland's middle school students by providing educational enrichment activities such as the music, art and world languages so important for a well-rounded education.

**YES on G1** is fiscally accountable. By law, **YES on G1** ensures all money benefits local Oakland teachers, staff and students -- not a dime can be taken by Sacramento politicians. A 5-member Independent Citizens' Oversight Commission reviews all spending. Seniors 65+ and low-income residents are exempt from Measure G1. Measure G1 expires in 12 years unless renewed by voters.

**YES on G1** keeps great teachers and school educational staff in the Oakland community they love and develops and trains our next generation to become future leaders.

Join teachers, school staff, students, families and supporters from every Oakland neighborhood: **Vote YES on G1**. Yes on G1 [SupportOaklandTeachers.com](http://SupportOaklandTeachers.com)

"Your vote is needed more than ever to keep experienced, qualified teachers in Oakland. Like you, we're invested in our City and champion a vision of supporting and mentoring our students and newer teachers." --*Maryann Wolfe, Oakland Tech High School Teacher*

"Dynamic, excellent school enrichment programs keep students focused on core academics and contribute to a well-rounded education. Join us in supporting YES on G1!" *Kevin Jennings, Montera Middle School Teacher*

Nina Senn, Oakland Unified School Board Vice President, District 4

Lacy Lefkowitz, Teacher, Claremont Middle School

Susan Walton, Teacher, 30+ Year Elementary/Middle School Teacher

Melisha Linzie, Para-Educator, Oakland Unified School District

Hezekiah Burton, Skyline High School Graduate and UC Berkeley Student

No Argument Against was submitted

## II. FULL TEXT OF THE MEASURE

### BEGINNING OF FULL TEXT OF MEASURE----->>>>>

#### OAKLAND UNIFIED SCHOOL DISTRICT Districtwide Teacher Retention and Middle School Improvement Act

This Proposition may be known and referred to as the “Districtwide Teacher Retention and Middle School Improvement Act” (the “Act”) or as “Measure \_\_\_\_”. [*designation to be assigned by County Registrar of Voters*]

#### KEY GOALS

- 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.

#### FINDINGS

The Oakland Unified School District (the “District”) is committed to teaching its middle school students in a safe environment and providing more time for activities such as music, art, and studying world languages.

Oakland teachers’ and educational school staff salaries are currently among the lowest in the Bay Area, and the District is committed to paying its teachers competitively so they can continue to work where they live.

Funding from the State of California (the “State”) has not been adequate to meet these goals, and the District has no assurance that State funding will permit the District to meet these goals in the future.

Funding from the Federal Government is insufficient to meet these goals, and the District has no assurance that Federal funding will permit the District to meet these goals in the future.

#### SPECIFIC PURPOSES

The Districtwide Teacher Retention and Middle School Improvement Act Fund is established to provide a salary increase to school-site educators district-wide, including charter schools in the District, and to provide Middle School grants which shall be allocated pursuant to the Education Improvement Plan submitted by each Middle School as further described below, and which shall be spent in furtherance of the goals set forth in the section entitled “GOALS” above.

## EDUCATION SPENDING PLAN

Middle School grants shall be distributed to Middle Schools pursuant to the Local Control Funding Formula methodology upon the submission, review, and approval by the Board of Education of each school's annual Education Improvement Plan. Middle School grants shall be used to further any one or more of the goals set forth in the section entitled "GOALS" above. Middle School grants shall only be spent at Middle Schools. An approved education improvement plan shall include, at minimum:

- Completion of a diagnostic self-evaluation of the school's curricular and safety needs, including an assessment of community demand for arts, music, and language education.
- Annual and Three-Year accountability indicators toward achieving one or more of the stated goals of this Measure.
- Evidence-based strategies designed to meet the accountability indicators.
- Annual benchmarks for improved retention of students transitioning from elementary to middle school.
- Description of how school staff, time schedules, and budgets are coherently structured to implement the school improvement plan's strategies and activities.

## ALLOCATION METHODOLOGY

At the end of each fiscal year, beginning with Fiscal Year 2017-18, the District shall determine the total revenue generated by the Act (such amount hereinafter referred to as "Total Revenues"). The District shall allocate:

- 1% of Total Revenues to reimbursing administrative overhead costs incurred by the District in connection with the administration of the Act.
- A percentage of Total Revenues to charter schools within the District equal to the number of students enrolled in charter Middle Schools within the District divided by the total number of students in the District attending District or Charter Middle Schools, multiplied by 100, as adjusted by the Local Control Funding Formula (such amount hereinafter referred to as "Total Charter Revenues").
- The remaining amounts left from Total Revenues after allocation of Total Charter Revenues to the District (such funds hereinafter be known as "Total District Revenues").

Total District Revenues and Total Charter Revenues shall each be further allocated according to the following percentages:

- 65% to provide raises to school site educators. The same percentage increase in salary shall apply to all school site educators; and
- 35% of Total Revenues to provide Middle School grants as further described in the section entitled "Education Spending Plan" above.

## DEFINITIONS

“School Site Educator” shall mean all site based educators and all represented employees.

“Middle School” shall mean any district school or charter school within the District serving grades 6, 7, or 8, regardless of whether the school serves grades in addition to those grades.

## SENIOR CITIZEN EXEMPTION

In order to provide tax relief to senior citizens in the community, any parcel owned and occupied by a person 65 years of age or older shall be exempt from the education parcel tax upon proper application to the District. The exemption shall be available pursuant to procedures to be prescribed by the Board of Education or otherwise as required by law or by the Alameda County Tax Collector.

## LOW INCOME EXEMPTION

An exemption from this tax shall be made for owners of single family residential units in which they reside whose combined family income from all sources for the previous calendar year is at or below the income level qualifying as “very low income” for a family of such size under Section 8 of the United States Housing Act of 1937, 42 U.S.C.A. Sections 1437 et seq. for each year. Owners must apply for this exemption annually by petition to the Office of the Chief Financial Officer of the District in the manner and at the time set forth in procedures established by the District. Such petitions shall be on forms available from the Chief Financial Officer’s office and must provide information sufficient to verify income including, but not limited to, federal income tax returns and W-2 forms of owner-occupants.

## TERMS AND SUNSET

Upon approval of two thirds of those voting on this Districtwide Teacher Retention and Middle School Improvement Act, the Board of Education of the District shall be authorized to levy a qualified special tax on each parcel of taxable real property in the District, in the annual amount of \$120 for twelve years, commencing July 1, 2017.

## ACCOUNTABILITY PROVISIONS

Oversight Commission. The Board of Education shall establish a Commission comprised of five (5) persons giving preference to persons who demonstrate extensive knowledge and expertise in middle school education, with a focus on arts, music, and world languages, school safety, and in compensation for K-12 educational professionals. 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. The Board of Education shall



provide by resolution for the composition, funding, staffing, and other necessary information regarding the Commission's formation and operation.

#### PUBLISHED INDEPENDENT ANNUAL AUDIT.

Upon the levy and collection of the education parcel tax, the Board of Education shall cause an account to be established for deposit of the proceeds, pursuant to Government Code Section 50075.1. For so long as any proceeds remain unexpended, the Superintendent or the Senior Business Officer of the District shall cause an independent financial auditor to prepare a report to be filed with the Board of Education and made publicly available no later than December 31 of each year, commencing December 31, 2017, stating (1) the amount collected and expended in such year; (2) the description of all programs funded, and a determination that the monies expended were for the allowable uses stated in this Measure; and (3) the determination that the revenues leftover after the raise provided to school-site educators generated by this Measure are being used to supplement, and not supplant, unrestricted general fund revenue so appropriated to schools to serve pupils in grades 6 through 8 based on fiscal year 2017-18 funding. The cost of said Independent Audit may be paid from the proceeds of the parcel tax. The report may relate to the calendar year, fiscal year, or other appropriate annual period, as said officer shall determine, and may be incorporated into or filed with the annual budget, audit, or other appropriate routine report to the Board of Education.

#### SECURITY FROM STATE SEIZURE OR USE

If, in any fiscal year during the term of the education parcel tax, the State Legislature or Governor shall approve any law or take any action the effect of which shall be to deprive the District of the benefit of any proceeds of the education parcel tax, whether by directly taking such proceeds for any State purpose or by taking such proceeds into account for purposes of calculating State support of the District under Section 8 of Article XVI of the State Constitution or under any program of categorical aid, special aid or other special programs, then the Board of Education shall reduce the rate of the education parcel tax commensurately.

#### LEVY AND COLLECTION

The education parcel tax shall be collected by the Alameda County Tax Collector at the same time and in the same manner and shall be subject to the same penalties as *ad valorem* property taxes collected by the Tax Collector. Unpaid taxes shall bear interest at the same rate as the rate for unpaid *ad valorem* property taxes until paid.

"Parcel of taxable real property" shall be defined as any unit of real property in the District which receives a separate tax bill for *ad valorem* property taxes from the Alameda County Tax Collector. "Parcel of taxable real property" shall exclude all parcels which are otherwise exempt from or on which are levied no *ad valorem* property taxes in any year, and all parcels which qualify for the senior citizen or low-income exemption provided by this Districtwide Teacher Retention and Middle School Improvement Act.

The District shall annually provide a list of parcels to the Alameda County tax collection officials which the District has approved for an exemption in accordance with this Act.

Eligibility for the senior citizen exemption and low income exemption shall be determined solely by the District, and any taxpayer wishing to challenge the District's determination, or claim a refund or reimbursement of taxes paid while eligible for the exemption, shall apply directly to the District.

The Alameda County Assessor's determination of exemption or relief for any reason of any parcel from taxation, other than through the senior citizen exemption and low-income exemption, shall be final and binding for the purposes of the education parcel tax. Taxpayers wishing to challenge the County Assessor's determination must do so under the procedures for correcting a misclassification of property pursuant to Part 9 of Division 1 of the California Revenue and Taxation Code or other applicable procedures. Taxpayers seeking a refund of any tax paid shall follow the procedures applicable to property tax refunds pursuant to the California Revenue and Taxation Code.

#### SEVERABILITY

The Board of Education hereby declares, and the voters, by approving this Districtwide Teacher Retention and Middle School Improvement Act, concur, that every section, paragraph, sentence and clause of this Act has independent value, and the Board of Education and the voters would have adopted each provision hereof regardless of every other provision hereof. Upon approval of this Act by the voters, should any part be found by a court of competent jurisdiction to be invalid for any reason, all remaining parts hereof shall remain in full force and effect to the fullest extent allowed by law.

<<<<<-----END OF FULL TEXT OF MEA