

Date: January 10, 2019

To: Measure N Commission

From: David Kakishiba

Re: Proposed Restatement of the “Guidelines for the Allowable Use of Measure N Funds”, adopted by the Board of Education on June 8, 2016 (Legislative File ID #16-1178).

This proposal to modify and restate the “Guidelines for the Allowable Use of Measure N Funds” is presented below for your review, deliberation, and action. This proposal has been developed to remove the time-bound nature of the Guidelines, and to address new conditions that have emerged from Oakland Unified School District’s implementation of Measure N since June 2015.

Below is the proposed restated “Guidelines for the Allowable Use of Measure N Funds”. Following this proposal is the original “Guidelines” as adopted by the Board of Education on June 8, 2016.

Proposed Modified Guidelines for the Allowable Use of Measure N Funds

1. Planning Grant

Every eligible high school seeking Measure N funds for the first time must submit a Planning Grant application to the Measure N Commission for review and action. The Planning Grant is designed to support school leaders to assess their school community’s readiness to organize and operate in accordance with the Linked Learning framework, and to develop their school’s three-year plan to build and implement high-quality career pathways that serve every student in the school.

Every eligible high school seeking Measure N funds for the first time shall receive a Measure N Planning Grant in the amount of \$200 per student to support their planning efforts for one fiscal year.

2. Implementation Funds

Every eligible high school that received a Planning Grant must submit an Education Improvement Plan in order to receive Measure N Implementation Funds.

The Education Improvement Plan must: 1) evaluate the readiness of the school community to organize and operate the school in accordance with the Linked Learning framework; 2) describe how the school will build-out and implement high-quality career pathways, in accordance with the Linked Learning framework, to serve every student

in their school; 3) include a line-item budget that clearly demonstrates how Measure N funds are to be used to build and implement career pathways in accordance with the Linked Learning framework; and in subsequent years 4) evaluate the quality of career pathway(s) implementation and the impact career pathways have had on student learning outcomes.

The Education Improvement Plan must be informed and developed by the ongoing participation of major school stakeholders, including school administrators, teachers, students, parents, service-provider partners, career industry partners, and classified employees. There must be clear evidence in the Education Improvement Plan of such participation of key stakeholders.

Every eligible high school must develop, submit, and present an Education Improvement Plan each year to the Measure N Commission for its review and recommendation.

Every eligible high school whose Education Improvement Plan is recommended for full funding by the Measure N Commission for approval and approved for full funding by the Board of Education shall receive Measure N Implementation Funds in the amount \$850 per student for the fiscal year so approved.

3. Implementation Funds – Less Than \$850 Per Student Allocation

An eligible high school may be recommended by the Measure N Commission and approved by the Board of Education to receive Measure N Implementation Funds in an amount less than \$850 per student due to specific challenges in the school's Education Improvement Plan and/or the school's readiness to organize and operate its school in accordance with the Linked Learning framework. A high school that receives Implementation Funds less than \$850 per student in any given fiscal year shall have receive the balance of unallocated Implementation Funds (\$850 per student minus the actual per student allocation) in the fiscal year following the school's satisfactory resolution of all corrective actions.

4. Carryover of Unexpended Funds

Every eligible high school receiving a Planning Grant or Implementation Funds may carryover and use all unexpended Measure N funds from one fiscal year to the next fiscal year upon the recommendation of the Measure N Commission and the approval of the Board of Education. A high school seeking a carryover and use of unexpended funds must submit and present a written Budget Carryover Request to the Measure N Commission. The Budget Carryover Request must: 1) explain the specific reasons why allocated Measure N funds were not expended; 2) describe how carryover funds will be used to specifically advance the implementation of the school's Education Improvement Plan; and 3) provide a line-item budget for the use of carryover funds.

Every eligible high school whose Budget Carryover Request is recommended for approval by the Measure N Commission for and approved by the Board of Education shall be authorized to carryover and use unexpended Measure N.

5. Contingency Fund

All Measure N revenue not allocated to schools and administration shall be held in reserve and maintained as a "Contingency Fund". Monies in the "Contingency Fund" shall be allocated on a per student basis to address any negative financial impact to high schools due to rising overall high school student enrollment, Measure N revenue shortfalls, or due to the expiration of Measure N's ten-year term.

Guidelines for the Allowable Use of Measure N Funds

as approved by the OUSD Board of Education on June 8, 2016

1. All 2015-2016 Measure N revenue not allocated to schools (a.k.a. 90%) and to administration (a.k.a. 10%) shall be held in reserve and maintained as a "Contingency Fund". The Measure N Commission will allocate money from this Contingency Fund to address any negative financial impact to high schools due to rising overall high school student enrollment, Measure N revenue shortfalls, or due to the expiration of Measure N's ten-year term. In addition, if approved by the Measure N Commission, these Contingency Fund resources can be used to provide schools with additional funds to support site visits or innovative programs and pilots that may contribute to better student outcomes as outlined by Measure N.
2. Enable every high school and Measure N administration to rollover all unexpended Measure N budget allocations from one fiscal year to the next fiscal year, for a period not to exceed three consecutive fiscal years. If funds are to be carried over from one year to the next, schools must complete a "Carryover Justification" that identifies why the funds were not expended and identifies a clear use of the funds in the next fiscal year. Any unexpended funds at the end of the 3-Year Education Improvement Plan cycle will be added into the Measure N "Contingency Fund."
3. All eligible high schools that received a "Planning Grant" for the 2015-16 school year, must submit a 2016-2019 Education Improvement Plan in order to receive continued funding. The Education Improvement Plan must be informed and designed by the ongoing participation of major stakeholders, including school administrators, teachers, students, parents, service-provider partners, career industry partners, and classified employees in order to be eligible for 2016-2019 funding. There must be clear evidence of these meetings that include key stakeholders.
4. Schools may choose not to expend the full allocation for a given year during the 2016-19 funding cycle. The school must justify why they are holding these funds in reserve in order to fund a larger future initiative that supports college, career and community readiness.
5. An eligible high school that receives Measure N Commission approval for an annual budget allocation in an amount less than the school's total per pupil Measure N allocation for that fiscal year shall have access to those unallocated funds (Eligible Allocation minus Approved Budget Request) in the following fiscal year. This policy applies to a school that submits a budget request that reflects a phased-in implementation plan, as well as to a school whose Single Plan for Student Achievement was conditionally approved by the Measure N Commission.
6. New eligible Oakland high schools that would like to begin the planning process for Measure N, will submit a "Planning Grant" for the 2016-2017 school year. A school receiving a Planning Grant will receive \$200 per student for the year with the remaining balance of Measure N funds being held for the school in a "School Reserve" fund that can be expended in the 11th year. The school will have a calendar year to plan for the

implementation of full funding from Measure N as outlined above. Education Improvement Plans must be submitted to the Measure N Commission in April of 2017.

7. Every high school shall submit to the Measure N Commission each year:
 - a. Quarterly Updates to Commission on Action Plan (3 per year)
 - b. Annual Report on Single Plan for Student Achievement Implementation (by March)
 - c. Annual Update to the Single Plan for Student Achievement (by May)
 - d. All schools must submit a detailed fiscal accounting of how all Measure N funds were expended for the previous fiscal year by November 1. Any unexpended funds must be accompanied by the "Carryover Justification" to be used in the next fiscal year.