

To: Chief Business Officer Lisa Grant-Dawson, Chief Academic Officer Sondra Aguilera
From: Amy Golden, Chairperson, Measure G Committee
Date: October 7, 2020
Re: Reporting 2020-2021

Each year the Measure G Committee prepares an Annual Report. Resolution No. 0809-0043 adopted on August 27, 2008 provides that the Committee shall:

Receive and review a report from the Superintendent no later than December 31st of each year that details: (1) the amount of Education Parcel Tax revenues received and expended in the prior year, including District reports and independent annual audit reports pertaining hereto; and (2) the status of any projects or descriptions of any program funded from proceeds of the tax.

At the Measure G Committee Meeting held on September 21st, 2020, Chief Business Officer Lisa Grant-Dawson, stated that she would like more clarity with respect to what information the committee is requesting for the remainder of 2020.

For reference, I am also attaching a letter (p.4-5), dated November 18, 2019, which is also included in our Annual Report, from Chairperson Baldo to Dr. Aguilera, setting forth our primary ask as a Committee, and a set of benchmarks (p.6) including in both the 2019 and 2018 Annual reports.

As such, the Committee proposes the following schedule:

Monday, October 19, 2020 -- Report on total funds received in 2019-2020 and how they were spent by program (see attached summary for 2018-19, 2017-18 on p. 3)

- Total amount of revenue received, programmatic breakdown of how those funds were spent.
- Explanation of any categories of spending such as "Other programs" that are not specifically contemplated by the language of Measure G.
- Confirm when the district will provide numbers to the independent auditor.

Monday, November 16, 2020 -- Report on the impact of Measure G spending on libraries. Specifically:

- Which schools received library funds?
- What does the district consider an appropriate use of library funds?
- How is site spending of library funds tracked now that the district does not have a head librarian?
- Which schools have librarians? Library techs? other?
- What percentage of funds are spent on staff?
- What percentage of funds are spent on books housed in libraries (not classrooms)?
- How is the \$100K previously allocated to the Head Librarian's position, which was

eliminated, being reallocated?

- It may be helpful to hear from Wes Jacques as it is the Committee's understanding he is now in charge of libraries within the district
- How were libraries utilized after the March 13, 2020 shut down of schools?

Wednesday, December 16, 2020 (rescheduled) --

- Report on impact of Measure G spending on class size. The Committee understands that the District draws money from several sources to reduce class size. The Measure G Committee is charged with understanding the impact of Measure G funds and therefore asks what impact the spending of Measure G funds on:
 - Reduction in class size overall (average across all grades)
 - Reduction in class size in K-5 (average across all grades)
 - Reduction in class size by grade level
 - Reduction in class size for general ed classes
 - Reduction in class size for special day classes
 - Reduction in class size by school site
- Report on status of getting necessary reports to auditor so that the Committee's Annual Report may be completed in a timely manner

January meeting -- date TBD due to conflict with Martin Luther King Day.

- Report on funds spent on "basic school support" which the Committee understands from past reporting to be for teacher salaries.
- The Committee notes that Measure G includes language that funds may be spent "to attract and retain highly qualified teachers", but it does not include language stating that the funds may go directly to teacher salaries.
- The Committee requests an analysis/evidence of how funds spent on salaries are "attracting" "highly qualified teachers"
- Auditor's report (draft)


February meeting - date TBP due to conflict with Presidents' Day

- Update on progress toward recommended benchmarks (p. 4)
- Auditor's report (final)

For Monday meetings, all documents must be sent to OuFin Saechao by the Thursday before so that they are included in the published Agenda or they may not be presented at the meeting. For the Wednesday meeting, I believe they must be submitted by Monday, but please confirm with staff as staff are most familiar with the internal deadlines.

| Spending By Program | 2018-19 | 2017-18 |
|--|---------------------|----------------|
| Basic School Support | \$7,794,007 | \$4,634,056 |
| Class Size Reduction | \$4,543,742 | \$6,399,636 |
| Elementary Education Intervention Program (EEIP) | \$4,053,143 | \$4,872,862 |
| School Libraries | \$1,637,804 | \$1,592,704 |
| Music | \$1,010,101 | \$1,049,806 |
| HR Operations | \$542,192 | 0 |
| Art | \$414,352 | \$475,229 |
| Other Programs / Local Goals | \$346,074 | \$337,762 |
| HR Recruitment | \$270,990 | \$936,634 |
| Oakland Fine Arts Summer School | \$61,121 | \$76,118 |
| Effective Educator Systems Initiative | 0 | \$48,258 |
| Grand Total | \$20,673,526 | |

| | Recommendations | Action ? |
|---|--|----------|
| | <i>Transparency Needed: Allocation Process Is Not Clear</i> | |
| 1 | Adopt a clear process for allocating Measure G funds. | ✗ |
| 2 | Publish that process so that the public is aware of it. | ✗ |
| 3 | Adjust the process over time with community input and program assessment to maximize transparency and impact. | ✗ |
| | <i>Impact Strategy Is Not Clear</i> | |
| 4 | During the budget development process, publish an allocating strategy for Measure G funds along with a rationale and a way to assess that strategy. Present the plan to the Measure G Committee. | ✗ |
| 5 | Adjust the strategy over time to maximize impact and take schools' needs into account. | ✗ |
| 6 | Consider Measure G in context with other Measures (G1, N) and consider pooling resources (within the scope of the law) to increase impact and process efficiency. | ✗ |
| | <i>Better Collaboration Is Needed Between Sites and Central</i> | |
| 7 | Develop a Measure G allocation and evaluation process which values the site leader's time and knowledge of their community's needs while also holding them accountable. | ✗ |
| 8 | Consider consolidating or reusing existing, well-functioning processes for accessing funds rather than creating new ones which require more time from school leaders. | ✗ |
| | <i>Allocations Are Not Consistent Or Predictable</i> | |
| 9 | When acting on the findings and recommendations in this report, make consistency and predictability a top priority. | ✗ |
| | <i>Measure G Is Not Considered A Restricted Resource</i> | |

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| 10 | Reclassify Measure G as a restricted resource as part of the transition to the new Escape financial management system. |  |
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11/18/2019

Dr. Aguilera,

Thank you for the presentation and discussion at our last two meetings. We really appreciate your time and your candor.

I want to clarify our #1 ask as a Committee. Most of our outstanding recommendations require flexibility in how Measure G funds can be allocated, and that flexibility doesn't exist today.

So we would like to work backwards from this goal:

- Measure G allocations can be strategically determined and set on a regular interval (currently: annually) and not just roll over from one cycle to the next.

We're requesting a plan, including a timeline with milestones, for reaching this goal flexible and strategic Measure G allocations.

Here is our suggestion for a 4 year gradual plan. "Flexible Allocation" means money not spent on base allocation obligations to school sites through programs like Class Size Reduction, Basic School School Support, or Elementary Intervention since these are contract obligations and not strategic, supplemental spending.

| Budget Year | Flexible Allocation |
|-------------|----------------------|
| 2020-21 | 25% (~\$5 million) |
| 2021-22 | 50% (~\$10 million) |
| 2022-23 | 75% (~\$15 million) |
| 2023-24 | 100% (~\$20 million) |

Please include any action items that your team, finance staff, or even the Committee may need to take in order to reach the first milestone.

These are hard for us to predict, but perhaps:

- Communicating the plan to cabinet leadership, the Board, and our finance department
- Asking the Board to adopt this plan a Board policy

- Instructional and financial leadership submitting a list of items which will no longer receive Measure G allocation in 2020-21 in order to reach the 25% milestone next year.
- Allocating at least 25% of Measure G to instructional programs outside of a base site allocations in the 2020-21 budget development process

Our #2 request: when we presented to the Board's budget and finance subcommittee, we suggested a new process for Measure G allocation. Can you respond with one of the following?

- Timeline for implementing this process
- Alternate process, reasons for choosing that process, and a timeline for implementing it

We will need a new, transparent process for allocating these flexible dollars since we will no longer be rolling over allocations from year to year. More details are in our original report, but this process should be transparent, strategic, and allow for consistent and predictable allocations.

Thank you, again.

John Baldo