

MEASURES N AND H – COLLEGE AND CAREER READINESS COMMISSION

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Oakland, CA 94607



**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

**Measures N and H –
College & Career Readiness Commission**

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Board Office Use: Legislative File Info.	
File ID Number	24-2092
Introduction Date	01/16/2024
Enactment Number	
Enactment Date	

Memo

To Measures N and H – College and Career Readiness Commission

From Vanessa Sifuentes, High School Network Superintendent

Board Meeting Date _____

Subject The 2024-25 Measures N and H Permissible Expenses Document
Services For: All High Schools

Action Requested and Recommendation Adoption by the Measures N and H Commission of the 2024-25 Measures N and H Permissible Expenses Document.

Background

(Why do we need these services? Why have you selected this vendor?)

Competitively Bid

Was this contract competitively bid? No
If no, exception: N/A

Fiscal Impact

Funding resource(s): Measure N
Measure H

Attachments

- 2024-25 Measures N and H Permissible Expenses Document

2024-25 Measures N and H Permissible Expenses

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[Full Text of Measure N, Oakland Unified School District College & Career Readiness For All Act](#)
[Full Text of Measure H, 2022 Oakland Unified School District College & Career Readiness For All Act](#)

Purpose, Background, and Rationale for This Document

This document is intended to provide guidance to sites regarding the permissible uses of Measure N and Measure H funding.

- The 2024-25 school year is a transition year in which school site funding will be provided by both sources (Measure N and Measure H.)
- Therefore, all expenditures must satisfy the conditions set forth in both Measure N and Measure H.
- Under Measure N, “[t]he goal of the education improvement plan must be to equitably place all students in career pathways or academies that deliver challenging academics, career technical education, work-based learning, and personalized academic, social, and emotional support services.” Measure N also states that “proceeds shall be spent on the following school programs:
 - To increase support for students in college preparatory courses in every high school to ensure students 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 drop-out 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 to prepare them for admission to and success in college.”
- Similarly, under Measure H, “[t]he goal of each school’s Plan must be to equitably place all students in that school in career pathways or academies that deliver challenging academics, career technical education, work-based learning, and personalized academic, social, and emotional support services.” Similarly, Measure H proceeds may be spent on “staffing and education activities and programs consistent with the Theory of Action of the Measure. Examples of such permissible uses include (but are not limited to):
 - College and career preparatory courses (which includes Career Technical Education courses).
 - Work-based learning opportunities such as opportunities for career awareness and exploration, job shadowing, internships, and job certifications.
 - School and guidance counseling, tutoring, mentoring, and other intensive support services to Students.
 - High school bridge programs that help students successfully transition from 8th to 9th grade. ○ Post-high school bridge programs to help students successfully transition from 12th grade to post-secondary education and the workforce.
 - Materials, supplies, or equipment to support the design and implementation of student projects and project-based learning aligned to the pathway instructional focus.
 - Programming, staffing, and activities such as community-building field trips, retreats, student incentives, and other events and activities that promote student belonging, student goal setting, and increased motivation in pathways.
 - Staffing that enables student cohorting and parity across pathways in multi-pathway schools.



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- State of the art or industry-specific equipment that aligns to industry and career-readiness standards.
- Programming and staffing that facilitate student enrollment and success in college courses while in high school.”
- As seen above, the question of permissible expenditures under Measure N focuses on the four bullets above whereas the question of permissible expenditures under Measure H focuses on whether expenditures are consistent with the Measure H Theory of Action, with the 10 bullets above serving as examples (which incorporate the substance of the the four bullets from Measure N).
- In other words, anything that is permissible under Measure N is, by definition, permissible under Measure H. Therefore, given that both Measure N and Measure H proceeds will be expended in 2024-25, the Commission will use the Measure N expenditure guidance to serve as the guidance for Measure H expenditures as well.
- Measure N is slated to end June 30, 2025 with the intention that Measure N funds will be expended at that point and the district and schools will transition to Measure H only. There will be transparency in the next year regarding the process for reallocating unspent Measure N funds, should there be unspent dollars as of June 30, 2025.
- While permissible/non-permissible content has not been changed from the previous 2023-24 version in this document, it has been reorganized to align with the [2023-26 College & Career for All and Linked Learning Quality Standards](#). This is an intentional step towards shifts in permissible guidance to anticipate in the transitioning to Measure H only.
- This permissible expenses guidance is a living document, having gone through multiple iterations in the past, and it will continue to evolve in the future especially with the transition to Measure H only.

**Permissible Expenses text from the
[2022-23 Measure N Permissible Expenses](#) dated 12-19-22 is below this line.**

In order to expend Measure N funds, the expenditures must meet the 5 criteria below:

1. Be incorporated in the Measure N Education Improvement Plan that was approved by the Measure N Commission and the OUSD Governing Board
2. Align to the purpose of the Measure N initiative outlined above
3. Incorporate one or more of the four pillars of Linked Learning and logically lead to the Measure N Outcome Goals
4. Be aligned to the permissible uses
5. Not supplant existing programs, positions, or expenditures at the school site that were previously supporting the Measure N Goals and Outcomes as outlined below

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For All Schools: Please reference the [Measures N and H Proper Budget Justification Examples](#) for examples of justifications required when submitting Measures N and H Education Improvement Plans.

For OUSD High Schools Only: Please provide the proper justification stated in the Measures N and H Education Improvement, Strategic Carryover, or Carryover Plans when creating Measures N and H Escape requests.

Important Information regarding All Permissible Expenses:

Supplanting vs. Supplanting

The District or Charter Management Organization shall **NOT** reduce the amount of State and Federal Funds appropriated to the school to support the basic program that was established as the baseline in the 2014-2015 academic year.

Funds from Measure N must be used to supplement (increase the level of services) and not supplant (replace) funds from any unrestricted general purpose funds. Any program activity required by state law, State Board of Education (SBOE) rules, or local board policy may not be paid with these funds. State or local funds may not be decreased or diverted for other uses merely because of the availability of these funds. **The District and school site personnel must maintain documentation that clearly demonstrates the supplementary nature of these funds.**

The supplement, not supplant provision is intended to ensure that the services provided under Measure N are in addition to, and not in place of, services that would otherwise be provided to participating students with state and local funds if Measure N funds were not available. In addition, funds can not be used to cover the expenses of programmatic elements, staff salary, and costs that were previously being funded by the school. For example, if a site was providing counseling services through a college access partner in the baseline year, you could not shift that expense over to Measure N in the following year. This would be considered supplanting and is not allowed under the Measure.

Sites are encouraged to apply for and identify additional funding sources that will complement, supplement and support the attainment of Measure N Outcomes and development of required elements of Linked Learning.

Information regarding the Conditions for All Permissible Expenses:

Planning Grant

- *Expenditures must have a clear connection to the planning process, must support design work that creates the conditions for whole school improvement through career-oriented pathway development and must support the development of a clear logical thru-line that will become evident in the Education Improvement Plan that is finalized at the end of the planning year.*
- *Expenditures must support and should focus on the understanding of what Linked Learning is and strategies to pilot key aspects of the Linked Learning framework*
- *Expenditures must follow all current OUSD Board policies, procedures, and purchasing deadlines.*
- *Expenditures must occur within the fiscal year they were approved for, i.e. between July 1st and June 30th of each fiscal year.*

Measure N Education Improvement Plan

- *Expenditures must clearly support and come from the logical thru-line that is evident in the Education Improvement Plan.*
- *Expenditures should support and align to specific parts of your Education Improvement Plan to support students and pathway development.*

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- Expenditures should support the Theory of Action, should address the Root Cause Analysis, and should ensure the implementation of the Strategies in order to integrate the four pillars of Linked Learning.
- Expenditures must follow all current OUSD Board policies, procedures, and purchasing deadlines.
- Expenditures must occur within the fiscal year they were approved for on the EIP, i.e. between July 1st and June 30th of each fiscal year.

Important information regarding the Measures N and H Plans:

Measure N Education Improvement Plan

- Also known as EIP and requires approval by the Measures N and H Commission on a yearly basis.
- Effective term for use of these funds is from July 1st through June 30th of each fiscal year.
- Funds are not to be used for expenditures not included in the approved plan or outside of the approved effective term.
- Funds are uploaded in object code 4391 - Surplus.
- Expenditures must follow all current OUSD Board policies, procedures, and purchasing deadlines.

Measure N Carryover Plan

- Also known as C/O Plan, it is used when funds are left unspent and carried over to the following year. It requires approval by the Measures N and H Commission.
- Effective term for use of these funds is post Board of Education approval through June 30th of each fiscal year.
*BOE approval generally occurs 1 month after the plans are approved by the Measures N and H Commission.
- Funds are not to be used for expenditures that occurred prior to BOE approval, not included in the approved plan or outside of the approved effective term.
- Funds are uploaded in object code 4391 - Carryover
- Expenditures must follow all current OUSD Board policies, procedures, and purchasing deadlines.

Strategic Carryover Plan

- Also known as SCO Plan, it is optional, and requires approval by the Measures N and H Commission.
- Effective term for use of these funds is from July 1st through June 30th of each fiscal year.
- Funds will be strategically carried over and used in the following fiscal year, via the budget development and Education Improvement Plan pre-approval process. Funds are to support expenditures identified as needs at the beginning of the new school year.
- Funds are not to be used for expenditures outside of the approved effective term.
- Funds are uploaded in object code 4390 - Carryover Future
- Expenditures must follow all current OUSD Board policies, procedures, and purchasing deadlines.

Permissible Expenses

When thinking through the Measures N and H budget and expenses, consider the following questions to determine if the expense is allowable:

- If Linked Learning pathways did not exist at your school site, would this expense still be necessary?
- Is this expense providing something for Linked Learning pathways that has not been provided before or different than what has been provided before?
- How will this expense address a pathway need that has been identified in your Measures N and H Education Improvement, Strategic Carryover, or Carryover Plans?



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Types of Expenses

Aligned to Quality Standard: Integrated Program of Study		
Type of Expense	Permissible if... <i>aligns with OUSD Board policy and</i>	Non-permissible if... <i>violates OUSD Board policy or</i>
Staff Salaries (full or partial)	<p>The following positions are pre-Approved Measure N Positions</p> <ul style="list-style-type: none"> ● Pathway Coach ● College & Career Readiness Specialist ● Work-Based Learning Liaison ● Career Transitions Specialist ● Administrative Assistant (not to exceed 0.4 FTE per site) <p>Other positions must be above Base such as:</p> <ul style="list-style-type: none"> ● To teach new CTE courses ● To develop work based learning opportunities for students and the pathway's work based learning continuum ● To provide accelerations that are supplemental and integrated in pathway program of study ● To teach dual enrollment courses ● To coordinate internship program and placement of students ● Benefits associated with staffing the positions outlined above ● Costs for substitute teachers to cover pathway teachers to attend permissible conferences or field trips 	<ul style="list-style-type: none"> ● Teacher salaries for AP classes ● Staff salaries accounted for in Base ● Cost of substitute teachers due to not being able to hire a teacher ● Cost of substitute teachers due to teacher being out sick, personal, or on leave ● Cost of substitute teachers due to teachers attending required district meetings or events
Staff Stipends/ Extended Contracts	<ul style="list-style-type: none"> ● Planning meetings to address new pathway designs or pathway inquiry outside of the daily work schedule ● Planning or implementation of pilot programs aligned to pathway development outside of the daily work schedule ● Development of new curriculum development, collaboration, planning, etc. specifically for pathway development outside of the daily work schedule ● Summer enrichment program expenses above base 	<ul style="list-style-type: none"> ● Instructional Leadership Team (ILT) stipends ● Recurring meetings for Staff PD, Buy Back Days, Teacher Work or Collaboration Days ● General school wide planning meetings or events ● Moving or reorganizing classrooms



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<p>Staff Retreat costs</p>	<ul style="list-style-type: none"> ● Leadership and stakeholder retreats to strategically plan pathway development and implementation outside of the daily work schedule ● Retreat to plan pathway curriculum and/or pathway projects outside of the daily work schedule ● Retreat to plan and complete the Measure N Education Improvement plan outside of the daily work schedule 	<ul style="list-style-type: none"> ● Retreat to plan Instructional Leadership Team (ILT) retreats ● Retreat to plan administrative retreats/functions ● Retreat to plan regular school functions ● All school Beginning or End of the year retreats ● Retreats during Buy Back Days, Teacher Work Days or Collaboration Dates
<p>Extra Time or Overtime Compensation</p>	<p>ET/OT should not exceed 12 hours per day, that includes the employee's regular work shift and required breaks.</p> <ul style="list-style-type: none"> ● All ET/OT duties must be Measure N or Pathway specific duties. ● Case Manager providing additional home visits outside of daily work schedule to pathway students 	<ul style="list-style-type: none"> ● Using ET/OT to perform regular work duties ● Using ET/OT to cover for other employees
<p>Travel and Conference costs</p>	<ul style="list-style-type: none"> ● School site visits to other Linked Learning schools ● Attending Linked Learning conferences ● Attending Career Technical Education (CTE) specific conferences aligned to site's pathway 	<ul style="list-style-type: none"> ● Not aligned to pathway development
<p>Professional Development costs</p>	<ul style="list-style-type: none"> ● Professional development specific to the development and implementation of CTE and pathway CTE sequence ● Professional development specific to the development and implementation of Work-Based Learning ● Teacher externships to increase real world experiences of the industry sector 	<ul style="list-style-type: none"> ● Recurring Staff PD, Buy Back Days, Teacher Work or Collaboration Days ● General school wide PD ● Regular school functions
<p>Field trip costs</p>	<ul style="list-style-type: none"> ● Field trips to visit colleges ● Career exploration visits ● Engineering pathway students to attend Physics Day at theme park as part of pathway project assessing roller coasters ● Law pathway students visiting Sacramento as part of a pathway project ● Other field trips that are essential to the pathway program of study, CTE courses, project-based learning, and Work-Based Learning continuum ● Student meals are allowed only for overnight field trips beginning on the <u>2nd day</u> of the field trip at an amount not to exceed \$20 per student per day - payable via an employee reimbursement only with required supporting documents. 	<ul style="list-style-type: none"> ● Senior field trips ● College field trips for middle school students ● Chaperone costs including meals, admission fees etc. (non-OUSD employees)



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Supplies, Materials, or Equipment	<p>Please note the approval for supplies & materials is conditional - pending the review & approval of your request. A Measure N Justification Form is required for all purchases. In some cases a Lesson Plan might be required to ensure the items being purchased are permissible & supplemental. Measure N staff will notify you when it's required.</p> <ul style="list-style-type: none"> • Dual & Concurrent Enrollment books (<i>must be in master schedule or CE list</i>) • Specialized equipment, supplies, and/or materials required for integrated projects that are aligned to pathway CTE sequence and integrated in pathway program of study; must be to increase real world experiences of the industry sector 	<ul style="list-style-type: none"> • Printers, Scanners, Copiers, Duplicating Machines for any use • Maintenance, Service Agreements, Supplies, Materials, Ink or Equipment for Printers, Scanners, Copiers, or Duplicating Machines • LCD projectors, Smart Boards, Document Cameras • Audio/Visual equipment • Furniture including outdoor • Basic school supplies • Promotional stationery supplies (swag) • Plates, cups, utensils, table covers, decorations etc. for events
Furniture	<ul style="list-style-type: none"> • Medical furniture for Health pathways to implement pathway specific projects or curriculum • Other industry specific furniture required for pathway projects or curriculum to increase real world experiences of the industry sector 	<ul style="list-style-type: none"> • Desks, bookcases, etc. • Tables to replenish old tables or to have additional set of tables • Chairs/Stools to replenish old chairs/stools or to have additional set of chairs/stools • Cabinets, shelves, or sheds to organize or store supplies • Outdoor or Cafeteria furniture
Computers and Computer Equipment	<p>Please note the approval for Technology & Equipment is conditional - pending the review & approval of your request. A Measure N Justification Form is required for all purchases. This is required to ensure the items being purchased are permissible & supplemental.</p> <ul style="list-style-type: none"> • Specialized computers (including laptops) required to support a unique software for pathway specific projects and curriculum to increase real world experiences of the industry sector and/or required to meet industry standards • Security lock devices purchased specifically for the specialized computers (must be purchased with the original computer order and quantities must match number of specialized computers) 	<ul style="list-style-type: none"> • District / Charter provided computer equipment including but not limited to chromebooks, chromebook carts, chargers, unless it's specialized and required by CTE industry standards • iPads, and Tablets • Replenishing old computers or computer equipment purchased through General Purpose or non-Measure N funds • Additional set of non-specialized / general use computers or computer equipment



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		<ul style="list-style-type: none"> Replenishing stolen computers or computer equipment (<i>stolen items are replaced through OUSD Risk Management</i>) Annual purchases of the same technology orders are not allowed; the typical lifespan of technology items is 3 years.
Building and Facility Upgrades	<ul style="list-style-type: none"> Measure N does not allow building or facility upgrades 	<ul style="list-style-type: none"> Building and facilities upgrades to CTE classrooms such as adding new or reinforced structures, electrical, gardening, plumbing, painting or facility maintenance. Security upgrades to buildings or classrooms such as window grates, door bars or surveillance security systems

Aligned to Quality Standard: Work-Based Learning

Type of Expense	Permissible if... <i>aligns with OUSD Board policy and</i>	Non-permissible if... <i>violates OUSD Board policy or</i>
Internship costs	<ul style="list-style-type: none"> Stipends for student internships Transportation costs to and from internships 	<ul style="list-style-type: none"> Incentives to get students to attend school Incentives to get students to participate in internships (sign-up bonus) Transportation costs to and from school
Testing, Licensing, or Certification costs	<ul style="list-style-type: none"> SafeServe certification for Hospitality, Tourism, and Recreation pathways CPR training and certifications for Health pathways that have CPR integrated in program of study 	<ul style="list-style-type: none"> Costs associated with AP testing Costs associated with SAT and ACT testing
Field trip costs	<ul style="list-style-type: none"> Field trips to visit colleges Career exploration visits Engineering pathway students to attend Physics Day at theme park as part of pathway project assessing roller coasters Law pathway students visiting Sacramento as part of a pathway project 	<ul style="list-style-type: none"> Senior field trips College field trips for middle school students Chaperone costs including meals, admission fees etc. (non-OUSD employees)



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	<ul style="list-style-type: none"> Other field trips that are essential to the pathway program of study, CTE courses, project-based learning, and Work-Based Learning continuum Student meals are allowed only for overnight field trips beginning on the <u>2nd day</u> of the field trip at an amount not to exceed \$20 per student per day - payable via an employee reimbursement only with required supporting documents. 	
Uniforms or Clothing	<ul style="list-style-type: none"> Chef uniform for Culinary pathways Medical lab coats for Health pathways Other specific career industry uniform required for pathway projects or curriculum to increase real world experiences of the industry sector Uniform must remain school property 	<ul style="list-style-type: none"> School uniform or school/pathway apparel for students, teachers, or staff Athletic or Sport Uniforms, Shoes, or Equipment Professional attire such as blazers, slacks, pants, blouses, shoes, etc.
Meeting Refreshments	<ul style="list-style-type: none"> Meetings with industry professionals regarding pathways 	<ul style="list-style-type: none"> SSC meetings Staff meetings Recurring meetings for Staff PD, Buy Back Days, Teacher Work or Collaboration Days Back to School Night, Honor Roll Events, Community Events, Dances/Prom and other school wide events

Aligned to Quality Standard: Integrated Student Supports

Type of Expense	Permissible if... <i>aligns with OUSD Board policy and</i>	Non-permissible if... <i>violates OUSD Board policy or</i>
Meeting Refreshments	<ul style="list-style-type: none"> Meetings or gatherings with the community or students and families regarding pathways, pathway-specific interventions or activities 	<ul style="list-style-type: none"> SSC meetings Staff meetings Recurring meetings for Staff PD, Buy Back Days, Teacher Work or Collaboration Days Back to School Night, Honor Roll Events, Community Events, Dances/Prom and other school wide events

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Non-Permissible Expenses

The following expenses have been determined to be non-permissible:

- Mental Health Services
- Restorative Justice Services
- Gift cards
- Incentives for students such as rewards / gift cards / Props
- DJ and/or other forms of entertainment
- Marquee/Display signs, TV monitors
- Promotional or advertising materials for schools and/or pathways including but not limited to banners, flags, table covers, lanyards, shirts, buttons, bags, pencils, water bottles, stationery supplies, etc. (swag)
- Graduation ceremonial services including but not limited to renting facilities, renting equipment or furniture, flowers/decorations, programs, caps and gowns, diplomas and covers, and photography
- Internet, Telephone, Fax, or Cable Services including but not limited to technical consultants and/or support
- Athletic equipment and associated athletic costs
- Food or snacks to replace school provided meals

Information regarding the Conditions for Specific Permissible Expenses:

**Please note the following expenses must follow OUSD District policy requiring a minimum of 30 days for 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.
- Support deeper learning to better address quality pathway development. Measure N funds can be allocated for travel costs, stipends for staff to attend site visits, and lodging if necessary.
- School site visits should not have previously been funded from other sources.

Certificated Extended Contracts

Certificated extended contracts 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
- Be different than what teachers have been tasked with before
- 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 sources.

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Meetings/Professional Development on site

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 compensation 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 agendaized, 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 a regular daily work schedule or part of contractual obligations
- Compensation will be paid at the Extra Duty hourly rate of \$38.50 as stated in the new OEA Contract
- Compensation are non-permissible expenses for the following meetings: standing leadership meetings, SSC meetings, standing professional development days (district calendar PD, Buy Back Days, Teacher Collaboration or Work Days), department meetings, and other core meetings scheduled within the daily work schedule

Food for meeting refreshments or events

Per OUSD policy and procedure, food is non-permissible for staff meetings. Food is permissible for:

- Meetings with industry partners, students, and/or families to discuss pathway development work specifically.
- Pathway specific events such as pathway exhibitions in which industry professionals, students, families, and the community are welcomed to attend.
- These meetings should be agendaized, have recorded minutes, and should not be meetings previously funded from other sources, or meetings that have been required previously.

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 instructional core, pathway program of study, and overall pathway development.
- Professional development and/or conference should not have previously been funded from other sources or have been required previously by OUSD as standing professional development days (district calendar PD, Buy Back Days, Teacher Collaboration or Work Days)
- 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 funds 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. The **key criteria** is that these field trips must be different from what has been offered

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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. Funds can be used to:

- Cover charter bus rentals, admission fees, and/or lodging fees for all pre-approved field trips.
- 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. The field trips should not have previously been funded from other sources.
- Student meals are allowed only for overnight field trips beginning on the 2nd day. Meals are not to exceed \$20 per student, per day. Paid for via an employee reimbursement only. Itemized receipts required and not to exceed the number of students attending the trip.

Student Transportation

Student Transportation (such as Bus/BART tickets and Charter bus rentals) is an allowable expense for students to be able to participate in pathway curriculum and projects, project-based learning, pre-pathway exposure, work-based learning, CTE courses and coursework, dual enrollment classes, the Work-Based Learning continuum, and field trips (as identified above.) Key limitations to this permissible expense are that funds cannot be used to provide students with transportation to and from school. Please note:

- Bulk orders of Bus and Bart tickets are not allowed. The quantity of tickets allowed must match the number of students participating in the trip/event/internship, etc. If you have questions, contact Nancy.Gomez@ousd.org.
- Charter Buses are to be used for one-time events for students, not as an ongoing source of transportation to classes or other ongoing activities.

Staff Mileage Reimbursement

Staff Mileage Reimbursement is an allowable expense for staff to be able to participate in opportunities that further their professional growth in Linked Learning and/or allow staff to implement all four pillars of Linked Learning. Funds can be used to:

- Reimburse staff for visiting internship sites or other aspects of the work-based learning continuum
- Visit other high schools to observe Linked Learning best practices

Supplies and Materials

Supplies and materials are an allowable expense and funds 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.
- Approval is conditional pending review of the Measure N Justification form

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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	OUSD & Measures N and H Documents Required
<p>School Site Visits (local, same-day travel & reimbursements are required)</p>	<ul style="list-style-type: none"> ● Travel Request Pre-Approval Form ● Measures N and H Justification Form ● Agenda / Itinerary ● Other Anticipated Expense - Post Travel (paid via reimbursement) <p>Original Itemized Receipt(s) Required:</p> <ul style="list-style-type: none"> ○ Mileage print-out from MapQuest ○ Uber/Bridge Toll receipts ○ Meals are not applicable for same day visits, only reimbursed for overnight travel ○ Travel Expense Report ○ All forms must be attached to the request in Escape
<p>School Site Visits (that require travel, overnight)</p>	<ul style="list-style-type: none"> ● Travel Request Pre-Approval Form ● Measures N and H Justification Form ● Agenda / Itinerary ● Transportation Confirmation & Invoice ● Hotel Confirmation & Invoice ● Travel/Conference Request Payment Form ● Other Anticipated Expenses - Post Travel (paid via reimbursement) <p>Original Itemized Receipt(s) Required:</p> <ul style="list-style-type: none"> ○ Mileage print-out from MapQuest ○ Uber/Bridge Toll receipts ○ Meals (not to exceed \$40 per day) ○ Travel Expense Report ○ All forms must be attached to the request in Escape
<p>Conferences (that require travel, overnight)</p>	<ul style="list-style-type: none"> ● Travel Request Pre-Approval Form ● Measures N and H Justification Form ● Conference full Itinerary ● Transportation Confirmation & Invoice ● Hotel Confirmation & Invoice ● Travel/Conference Request Payment Form ● Other Anticipated Expenses - Post Travel (paid via reimbursement) <p>Original Itemized Receipt(s) Required:</p> <ul style="list-style-type: none"> ○ Mileage print-out from MapQuest ○ Uber/Bridge Toll receipts ○ Meals (not to exceed \$40 per day, when not provided at the conference) ○ Travel Expense Report ○ All forms must be attached to the request in Escape



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Permissible Expenses	OUSD & Measures N and H Documents Required
<p>Staff Retreats (off-site that require travel & lodging)</p>	<ul style="list-style-type: none"> ● Travel Request Pre-Approval Form ● Measures N and H Justification Form ● Agenda ● Participants List / Sign-in Sheet ● Hotel Lodging Confirmation & Itemized Invoice (*Please note that Meals are not to exceed \$40 per day, per employee) ● Other Anticipated Expenses via reimbursement - Post Travel (paid via reimbursement), Original Itemized Receipt(s) Required: <ul style="list-style-type: none"> ○ Mileage print-out from MapQuest ○ Uber/Bridge Toll receipts ○ Travel Expense Report ○ All forms must be attached to the request in Escape
<p>Meetings (held at school site)</p>	<ul style="list-style-type: none"> ● Pre-Approval Form for Special Event & Activities ● Measures N and H Justification Form ● Agenda ● Sign-in Sheet ● Meeting Refreshments: <ul style="list-style-type: none"> ○ Not to exceed \$75, per meeting. ○ Invoice or Original Itemized Receipts required ○ All forms must be attached to the request in Escape
<p>School Site Events (involve industry partners, students and/or families)</p>	<ul style="list-style-type: none"> ● Pre-Approval Form for Special Event & Activities ● Measures N and H Justification Form ● Event Refreshments: <ul style="list-style-type: none"> ○ Invoice or Original Itemized Receipts required ○ All forms must be attached to the request in Escape
<p>Extra Pay for Certificated Employees</p>	<ul style="list-style-type: none"> ● Extended Contract Form OR Paid Inservice Program & Projects and Curriculum Development Activities Form <ul style="list-style-type: none"> ○ The new hourly rate for all Extra Duty is \$38.50, per the new OEA Contract ○ EITHER attach the contract form to the HRA OR provide a response to all of the questions on the contract form in the body of the HRA. ○ Please make sure your justification aligns with pathway development.
Permissible Expenses	OUSD & Measures N and H Documents Required



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<p>Consultant Contracts</p>	<ul style="list-style-type: none"> ● Agreement between school and the vendor <ul style="list-style-type: none"> ○ Agreement must be on vendor’s letterhead and provide all of the vendor’s contact information ○ Agreement must be signed by vendor and school administrator ○ All of the expenses must be itemized including administrative costs ● Measures N and H Justification Form
<p>Field Trips (using Measure N funds only)</p>	<ul style="list-style-type: none"> ● Field trip packet ● Measures N and H Justification Form ● Invoice from the vendor
<p>Supplies, Materials or Equipment</p>	<ul style="list-style-type: none"> ● Measures N and H Justification Form <ul style="list-style-type: none"> ○ In some cases, depending on the type of supplies, additional information may be required for approval. MN staff will let you know when that is your case.

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Documents Required for Submission - Charter Schools

As part of your quarterly expenditure reports, please upload the supporting documentation indicated below to your site's google folder and keep a copy for your records for auditing purposes. Please contact Stacey.Blankenbaker@ousd.org with any questions.

Permissible Expenses	Documents Required
Staff Positions	<ul style="list-style-type: none"> ● Job Description ● Measures N and H Duty Statement for positions that aren't specific to Measure N AND for positions partially funded by Measure N ● Contract signed by employee and authorized school representative
School Site Visits	<ul style="list-style-type: none"> ● Itinerary, lodging confirmation, and flight confirmation ● Itemized receipts that accumulate to amount spent ● Measures N and H Justification Form
Certificated Extended Contracts and/or Staff Stipends	<ul style="list-style-type: none"> ● Charter Stipend / Extended Contract Form
Consultants	<ul style="list-style-type: none"> ● Consultant Contract, Scope of Work, Invoices and Proof of Payment ● Measures N and H Justification Form
Student Stipends (for Internships)	<ul style="list-style-type: none"> ● Job Description of Internship ● Invoices for Stipends that accumulate to the amount Spent ● Proof of Payment (copies of checks) ● Measures N and H Justification Form
Meetings, Professional Development or school events on Site	<ul style="list-style-type: none"> ● Agenda and sign-in sheets ● Itemized receipts that accumulate to amount spent ● Measures N and H Justification Form
Conferences, Retreats and other Off-Site Professional Development	<ul style="list-style-type: none"> ● Itinerary or Agenda documenting content of professional development ● Lodging confirmation and flight confirmation ● Itemized receipts that accumulate to amount spent ● Measures N and H Justification Form
Field Trips	<ul style="list-style-type: none"> ● Field Trip Packet ● Itemized receipts that accumulate to amount spent ● Measures N and H Justification Form
Supplies and Materials	<ul style="list-style-type: none"> ● Itemized receipts that accumulate to amount spent ● Measures N and H Justification Form



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Links to Forms & Resources for FY 2024-2025:

[Measures N and H Proper Budget Justification Examples - A Resource for EIP, SCO, C/O and Budget Modification Development](#) [for OUSD and Charter Schools]

Measures N and H Justification Form [for OUSD and Charter Schools]

Measures N and H Duty Statement Template [for OUSD and Charter Schools]

Measures N and H Budget Modification Forms:

- OUSD Single Modification Form
- OUSD Multiple Modifications Form
- Charter Single Modification Form
- Charter Multiple Modifications Form

Charter Stipend / Extended Contract Form [for Charter Schools]