



**CITY OF OAKLAND
CHILDREN'S INITIATIVE OVERSIGHT COMMISSION
REGULAR MEETING AGENDA
Thursday, September 26, 2024
4:00 PM
1 Frank H. Ogawa Plaza, Oakland, CA
Hearing Room #2**

Oversight Commission Members:

Bernadette Zermeno (D-7), Edgar Rodriguez-Ramirez, Jessica Jung (D-2), Kareem Weaver, Kym Johnson (D-4), Lange Luntao, Melanie Moore (D-2), Priya Jagannathan, Rickey Jackson (D-3)

PUBLIC PARTICIPATION

The Children's Initiative Oversight Commission encourages public participation. The public may observe the meeting in-person or via Zoom. For details on public comment, see below.

OBSERVE:

Please click the link below to join the meeting:

<https://us06web.zoom.us/j/83411971011>

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Dial(for higher quality, dial a number based on your current location):

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+1 386 347 5053 US

+1 507 473 4847 US

+1 564 217 2000 US

+1 646 558 8656 US (New York)

+1 646 931 3860 US

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Webinar ID: 834 1197 1011

International numbers available: <https://us06web.zoom.us/j/83411971011>

PROVIDE PUBLIC COMMENT: Below are the ways in which to make public comment within the time allotted for public comment on an eligible Agenda item.

Comment in advance:

To send your comment directly to the Oakland Children's Initiative Oversight Commission and staff BEFORE the meeting starts, please send your comment, along with your full name and agenda item number you are commenting on, to Jennifer Cabán at JCaban@oakland.ca.gov. Please note that eComment submissions close one (1) hour before posted meeting time. All submitted public comment will be provided to the Oakland Children's Initiative Oversight Commission prior to the meeting.

In-Person:

Each person wishing to speak on items must fill out and submit a speaker's card to staff prior to the meeting. Members of the public can address the Oakland Children's Initiative Oversight Commission in-person only and shall state their name and the organization they are representing, if any.

If you have any questions about these protocols,
please e-mail Jennifer Cabán at JCaban@oakland.ca.gov.

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Persons addressing the Children’s Initiative Commission shall state their names and the organization they are representing, if any.

	AGENDA ITEM	SCHEDULE	ACTION	ATTACHMENTS
1	Welcome	04:00 PM	AD	
2	Roll Call	5 Minutes	AD	
3	Review of Agenda	2 Minutes	AD	
4	Open Forum (Non-Agendized Items)	5 Minutes	AD	
5	Commission Minutes (July & August)	5 Minutes	A	Attachment 1-2
6	Accountability Officer Memo	5 Minutes	I	Attachment 3
7	FY23/24 Results Based Accountability Measures – Implementation Partner Presentations	85 Minutes	AD	Attachment 4-8
10	Wrap-Up & Next Steps Call for agenda topics for next meeting	5 Minutes	AD	

**A = Action Item I = Informational Item AD = Administrative Item
A* = Action, if Needed**

Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email JCaban@oaklandca.gov or call (510) 238-6840 or (510) 238-2007 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, o otra ayuda para participar? Por favor envíe un correo electrónico a JCaban@oaklandca.gov o llame al (510) 238-6840 o al (510) 238-2007 para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 JCaban@oaklandca.gov 或 致電 (510) 238-6840 或 (510) 238-2007 TDD/TTY.

Children's Initiative Oversight Commission

Community Agreements

- **Respect, Integrity, and Trust:** Speak your truth with curiosity and respect and be honest and constructive in disagreements. Ensure your communication reflects integrity in how you speak and receive information.
- **Accountability and Engagement:** Show up both physically and emotionally. Be accountable for your participation and commitment to the group's goals. Be intentional about how time is spent, ensuring we cover everything on the agenda and remain transparent about what is scheduled.
- **Curiosity and Accessibility:** Lean into curiosity, ask questions, and make information and processes accessible to all.
- **Community Voice and Inclusivity:** Center and channel the community's voice, ensuring that diverse perspectives are heard and valued.
- **Levity and Fun:** Embrace a positive and enjoyable atmosphere, incorporating levity and fun into the process.



**Children's Initiative Oversight Commission (CIOC) Meeting Notes
Special Meeting: Annual Retreat**



Date: July 27, 2024

Time: 9am – 3pm

Location: Joaquin Miller Community Center, 3594 Sanborn Dr, Oakland, CA 94602

Attendees:

- **Commissioners:**
 - Edgar Rodriguez-Ramirez
 - Jessica Jung (D-2)
 - Kareem Weaver
 - Kym Johnson (D-4)
 - Lange Luntao
 - Melanie Moore (D-2)
 - Priya Jagannathan
- **Staff:**
 - Jennifer Cabán
 - Nayeli Bernal
- **Other Participants:**
 - First 5 Alameda County:
 - Ayano Ogawa
 - Kristin Spanos
 - Laura Schroeder
 - Vanessa Cedeño
 - Oakland Promise:
 - Lauren Reed
 - Pete Haviland-Eduah
 - Sandra Ernst
 - Veena Pawloski
 - American Institutes of Research:
 - Gabriele Fain
 - Sembrando Lab:
 - Leah Graniela-Loving

Agenda items:

- 1. Breakfast and Welcome**
- 2. Call to Order:**
 - The meeting officially began at 9:30am.
 - No public comments.
- 3. Review of Agenda / Agreements / Icebreaker**
 - The agenda was reviewed and approved as presented.
 - Accountability Officer noted there were minor revisions required to the Early Education Fund presentation to align with Oakland Unified School District's policy on data reporting.
 - The Commission reviewed group agreements for the day to ensure a productive and respectful meeting. The group also engaged in a brief icebreaker activity called

‘memory exchange’, sharing memories from early childhood and college years to inspire passion and commitment among the group that connects to the Oakland Children’s Initiative.

4. RBA Implementation Partner Presentation

- Results Based Accountability (RBA) presentations provided by Oakland Children’s Initiative Implementation Partners. This was an initial presentation data since the Initiative’s implementation on: How much? How Well? And is anyone better off?
 - **First 5 Alameda County** presented a data summary and key findings on the Early Education Fund, representing initial January – June 2023 data provided by Priority Partners City of Oakland Head Start and Oakland Unified School District. The report summarized data on the number of children enrolled in partner sites, location of free and subsidized slots, percentage of free and subsidized slots enrolled (uptake), and infrastructure improvements.
 - **Oakland Promise** presented on the College Access supports funding, which included a summary of RBA baseline data from January – June 2023 and preliminary results from fiscal year 2024, combining data from direct services provided and funded partners’ data. The summary included number of children served by college savings accounts, number of caregivers receiving financial coaching, number of children enrolled in early college scholarships, number of students awarded post-secondary scholarships, number of students and caregivers participating in college- and career-bound programming and reporting college-bound identities, and post-secondary enrollment, persistence, and completion rates.

5. **Evaluation Partner – American Institutes for Research**, the selected evaluation partner for the Oakland Children’s Initiative initial 2-year Evaluation, provided an overview of the goals for the evaluation; overall approach to the evaluation; research questions related to implementation, economic impact, and big picture; and specific approaches for evaluation. The Commission discussed priorities for the evaluation, including uplifting the narrative about the Initiative within the context of the Oakland early education and college access ecosystem, changes in policies and structure, collaboration and partnership, and successes and challenges.

6. Build Values Activity

- Sembrando Lab facilitated the group in a ‘building values’ activity to identify and leverage shared values and continue strategic planning work for the Commission.

7. Commission Business

- The Commission voted to meet on a monthly meeting cadence beginning August 22nd.
- Commissioners who have termed out are placed on holdover status to meet legislation requirements on minimum number of Commissioners. These Commissioners are Kareem Weaver, Lange Luntao, and Melanie Moore. Each are interested in continuing to serve in their respective roles and were asked to formally re-apply for the Commission.

- Request for Oversight Commission recruitment assistance. Commissioners agreed to help promote Commission vacancies within their respective communities and networks, targeting the roles that need to be represented.

8. Wrap-Up and Next Steps

- Potential Community Events for the Oakland Children’s Initiative that would require Commissioner representation. These include:
 - College Day - Potential partnership with OUSD and California State University (CSU) fair November 2024.
 - Week of the Young Child in Spring 2025 (April 5-11).
- The Commission will continue discussing the types and calendaring of Communications content to share.
- Commissioners provided reflections of the day.
- Meeting adjourned at 3pm.

**Children’s Initiative Oversight Commission (CIOC) Meeting Notes
Special Meeting: Annual Retreat**



Date: August 22, 2024

Time: 4pm – 6pm

Location: City Hall – Hearing Room 2

Attendees:

- **Commissioners:**
 - Bernadette Zermeño
 - Edgar Rodriguez-Ramirez
 - Jessica Jung (D-2)
 - Kym Johnson (D-4)
 - Priya Jagannathan
 - Rickey Jackson (D-3)
- **Staff:**
 - Jennifer Cabán
 - Nayeli Bernal
- **Other Participants:**
 - American Institutes of Research
 - Gabriele Fain

Agenda items:

- 1. Welcome**
- 2. Roll Call**
 - Meeting called to order at 4:15pm.
- 3. Review of Agenda**
 - Agenda amended and affirmed to move up the following items from the original agenda: Other Commission Business, Kith Connections Community Event Planning and Discussion, and American Institutes for Research Next Steps, followed by the Retreat Debrief item. Commissioner Zermeño motioned; Commissioner Johnson seconded. Motion unanimously approved.
- 4. Open Forum (Non-Agendized Items)**
 - No public comments.
- 5. Other Commission Business – Review Upcoming Topics; Reschedule of Nov/Dec Meetings; Co-Chair Required**
 - November and December Commission meetings need to be rescheduled to accommodate holiday closures. The Commission agreed to adjust schedule to host a combined November/December Commission meeting on Thursday

December 5th at 4-6pm. Commissioner Zermeño motioned; Commissioner Rodriguez-Ramirez seconded. Motion unanimously approved.

- Commission discussed a draft outline of upcoming monthly meeting topics as follows:
 - September 26th: RBA presentations (confirmed).
 - October 24th: Fiscal Year 24-25 investments; Implementation Partners’ updated data elements; evaluation update.
 - December 5th: Presenting program plans; Kith connections updates.

6. Kith Connections Community Event Planning and Discussion

- Kith Connections will be the first Oakland Children’s Initiative event. The goals of the event are to (1) help attendees connect to the overall vision of the Initiative and see themselves reflected in the work, and (2) build relationships and connections with subcontractors and community partners.
- Commission discussed hopes for the event. Recommendations include: learn about subcontractors’ aspirations for the next couple of years; help subcontractors connect to the vision, mission, and language of the initiative; keep the event low-stress and interactive via activities like a gallery walk, tri-folds, or sticky notes that show appreciation and are celebratory; promote connections amongst subcontractors; include children’s performances or awards.
- Commission confirmed November 14th at 4-6pm as the best date and time for the event. The event is anticipated to have an attendance of about 75-80 attendees. This allows for at least 2 members from each community partner/subcontractor. Staff will follow-up on planning for the event.

7. Evaluation Partner – American Institutes for Research Next Steps

- Gabriele Fain shared evaluation updates with the Commission regarding contracting being nearly executed; categories of overarching research questions that evaluation will cover, including implementation, cost/use of funds, and big picture impact; sub-studies that will be conducted as part of the evaluation, including a collective impact study design, a process study on implementation, and an economic impact study; and the approach of leverage RBA measures and ongoing community engagement.
- Commissioners discussed the connection between RBA measures (annual, day-to-day) and evaluation (longer-term); the importance of grounding the study in the local context through informal conversations in the next few weeks; aspirations for the evaluation to uplift the key strengths of the Initiative, such as collaboration and coordination of services; and areas to be mindful about including avoiding being extractive and grounding community members as experts.

- Next steps include outreach to key stakeholders to setup interviews. Commission will be outreached to in the next few days.

8. Retreat Debrief

- Commissioners debriefed on the July 27th Commission retreat as being well-organized and having the right balance between presentations and community-building activities.
- The Commission also reviewed the draft Community Agreements developed during the retreat and provided feedback to refine, present, and vote on them at the October Commission meeting. Recommendations about integration of these agreements included opening and ending meetings with the agreements, adding them to agendas, creating a checklist for reflection after meetings, and integrating them as part of icebreakers.
- Commissioners also reviewed a list of values and documented their top five them using an online tool called Mentimeter. Once all Commissioners have done so, the group will review a list of emerging shared values, prioritize/rank order, and narrow down a list of Commission shared values to guide future work. Outreach will be done to any Commissioners who were not in attendance.

9. Wrap-Up and Next Steps – call for agenda topics for next meeting

- Commissioners discussed the need, per the bylaws, for a second Co-Chair in addition to Commissioner Jackson. Other updates included the upcoming financial audit for Initiative and the development of glossary document with shared language. Commissioners also suggested sharing a list of partner organizations for the fiscal year. Other topics to cover at future meetings, as suggested by Commissioners, included updates and presentations of different segments of the Initiative (ECE, College Access, etc.); different modalities of ECE; impact of literacy on children of different ages; impacts of Transitional Kindergarten expansion in Oakland Unified School District; opportunities to highlight services such as the Oakland Promise college savings account; uplifting a child's journey in Oakland from cradle to career; education around issues or needs that need to be met (example: McKinney Vento); vision for the five year guidelines and scaffolding; process of Implementation Partner selection in subcontracting.
- Meeting adjourned at 6:10pm



MEMORANDUM

TO: Children's Initiative Oversight Commission **FROM:** Jennifer Cabán
Accountability Officer

SUBJECT: Accountability Officer Report **DATE:** September 26, 2024

CIOC September 2024 Meeting

This informational memo for September 2024 is used to share pertinent, real-time information with the Oakland Children's Initiative Oversight Commission (CIOC).

OAKLAND CHILDREN'S INITIATIVE – ADMINISTRATIVE OVERVIEW

The Initiative continues to strengthen its internal infrastructure and capacity to ensure accountability in its work. Last year, we focused on equipping our Implementation Partners with the tools and supports to develop program plans, budgets, results-based accountability measures, and evaluation frameworks. Now, in our second full year of implementation, we are building upon that foundation by expanding the Office's engagement with the community and partners, who not only reflect the work but are a reflection of the Initiative itself. Below is an update on key accomplishments and upcoming priorities since our last formal report in May 2024.

Program Analyst II Onboarding – After an extensive hiring process, we welcomed Nayeli Bernal to the team on June 10, 2024. We extend our gratitude to the two hiring panels, which included Commissioner Priya Jagannathan, Noni Galloway (Parent Voices Oakland), LaTonya Bannister (City of Oakland), Page Tomblin (ECE Advocate and Consultant), Michael Munson (KTOP), and Jody Talkington (formerly of First 5 Alameda County).

Commissioner Retreat – On July 27th, we held the Commissioner Retreat at the Joaquin Miller Community Center. The minutes from this retreat are included in the agenda packet for reference.



Implementation Partner Retreat – Held on August 8th at Chapter 510, the retreat focused on the following core elements:

- **Objectives:**
 - Reflect on and assess progress with a focus on long-term goals.
 - Develop actionable items to strengthen communications, storytelling, and program and budget planning.
 - Foster professional networks and deepen relationships.

- **Agenda Highlights:** [INCLUDE RECAP ELEMENTS]
 - **Program Plan & Budget** | Story Arc Development
 - **Communications** | Alignment, Story mapping, and Timelines
 - **Stride Together** | Building a Collective Vision



EVENTS

- **August:**
 - **Oakland Education Fund – Castlemont Back-to-School Campus Beautification:** OCI Program staff volunteered at Castlemont High School to help prepare the facilities for the first day of school.
 - **East Oakland Youth Development Center – Black Futures Ball**
 - **Board & Commission Liaison Annual Training**
 - **F5 Sponsored OCI Joint Public Systems Partners Visioning Retreat:** Part 1 held in July, Part 2 in August.

- **September:**
 - **K-16 Collaborative - East Bay Pathways:** A regional Bay Area collaborative convening diverse partners and leaders to foster collaboration and shared solutions. The focus was

on developing education and computer science pathways, including details on degree programs, cross-enrollment, and dual enrollment course offerings.

2-YEAR EVALUATION RFP

- The contract is currently under final review.
- **Core Areas of Evaluation** (Reminder):
 - Economic Impact Analysis – Assessing \$ value added.
 - Evaluation of Implementation – Reviewing Implementation Partners (IP) and the overall OCI structure.
 - Informing the next iteration of the 5-Year Guidelines.
 - Enhancing existing practices and Results-Based Accountability metrics.

COMMUNICATIONS

- Videos 2 and 3, focused on each fund and Implementation Partner, were released in early August. Video 4 will be posted on the website during the week of 9/23.
- Year 2 planning is underway in collaboration with Implementation Partners.

COMMUNITY BUILDING, WORKGROUPS, & COLLABORATIVES

- **Kith Connections:** A gathering of the Commission, Implementation Partners, and community partners to strengthen solidarity and connection to the Oakland Children’s Initiative.
 - **Logistics:**
 - **Date:** Thursday, November 14, 2024
 - **Time:** 4 – 6 PM
 - **Location:** Oakland, to be confirmed in early October
 - "Kith" refers to familiar friends, neighbors, or relatives.
- **College Day:** A partnership between Oakland Unified School District, California State University, Oakland Children’s Initiative, and Oakland Promise. This inaugural event will feature a college fair with all 23 CSU campuses. Open to OUSD students, with some SFUSD students included. The organizing team meets bi-weekly to plan. Communication Directors and relevant personnel are coordinating broad outreach, including press releases and invitations to elected officials. Volunteer opportunities will be shared with Commissioners as available.
 - **Logistics:**
 - **Date:** Saturday, November 2, 2024
 - **Time:** 9 AM – 12 PM
 - **Location:** Fremont High School
- **Implementation Partner (IP) Collaborative:** Monthly meetings to focus on OCI elements such as program planning and communication.
 - **IP Communication Workgroup:** Monthly meetings are being scheduled.

- **IP Program-Specific Workgroup:** Meetings as needed for program planning, budgeting, evaluation, and reporting. A subset of IP staff will provide support, troubleshooting, and real-time iteration.

Please feel free to reach out with any questions or concerns. Thank you for your continued leadership and dedication to this important work.

In Community,



Jennifer Cabán

Accountability Officer, Oakland Children's Initiative
City Administrator's Office
City of Oakland



OAKLAND  PROMISE[®]

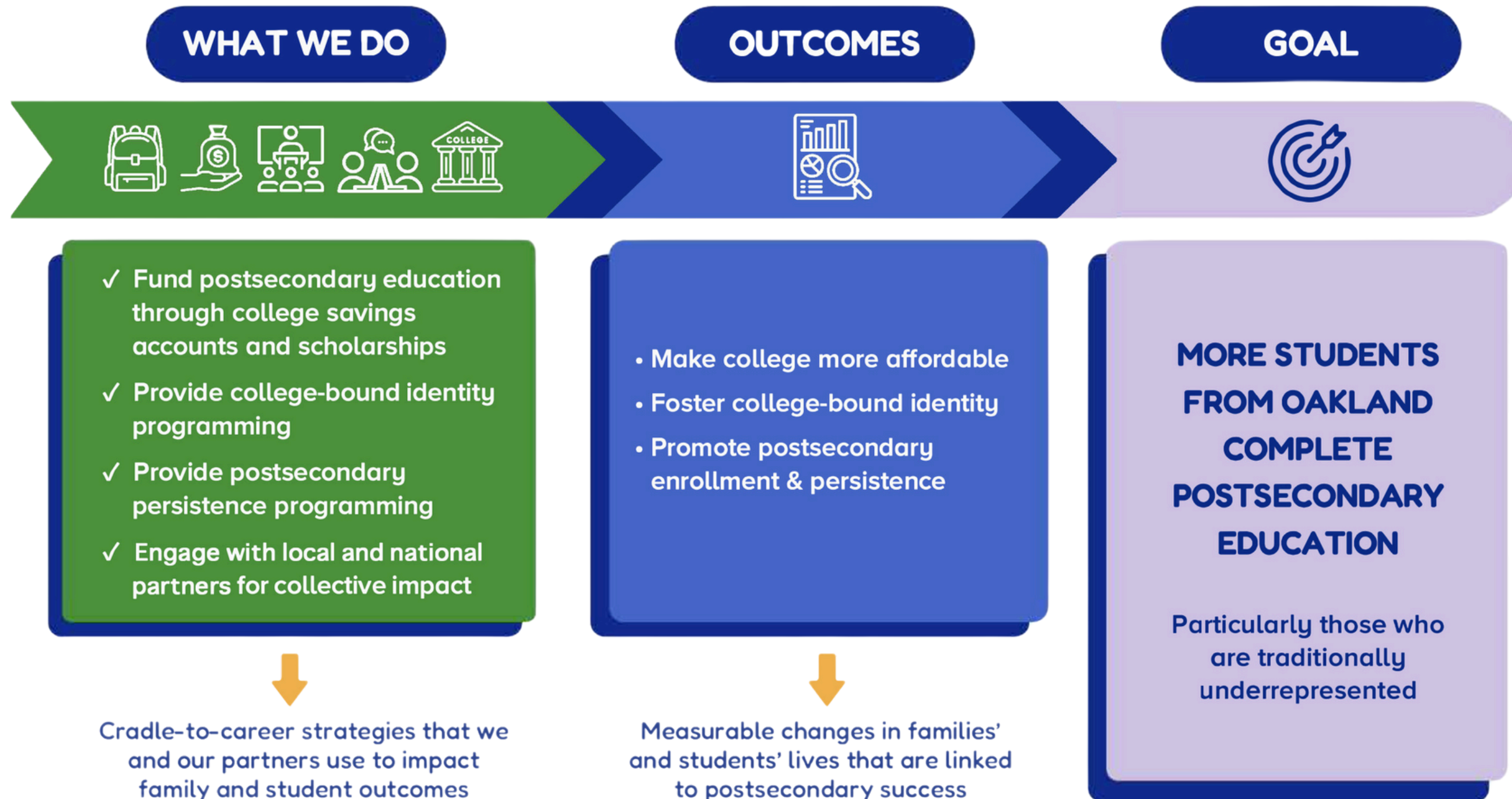
FY24 RBA METRIC RESULTS & PARTNERSHIP DEVELOPMENT

September 26, 2024



ORGANIZATIONAL STRATEGY

Oakland Promise is a cradle-to-career organization dedicated to equity and economic mobility through postsecondary education completion.



OUR ROLE IN COMMUNITY

Oakland Promise is the connector, convener, and coordinator of the key support systems for the Oakland community.



FY24 RBA METRIC RESULTS



1

More Oakland children, students, and families served now than ever before.

2

Our children, students and families are positively impacted by our services.

3

We are serving those who are most impacted by structural barriers to education.



Oakland Promise has been able to serve more children, students, and families than ever, with the goal of putting Oakland's children on the path to postsecondary success and economic mobility.

HOW TO USE THE SUPPLEMENTAL MATERIALS

Utilizing all of these supplemental materials will enable a holistic evaluation and representation of the services and impact from Oakland Promise and partners during FY24, the first full year of OCI implementation.



1

RBA Report

2

Data Tables

3

Narrative





Oakland Promise Results-Based Accountability Metrics Report FY 2024

COLLEGE ACCESS IMPLEMENTATION PARTNER
FOR THE OAKLAND CHILDREN'S INITIATIVE



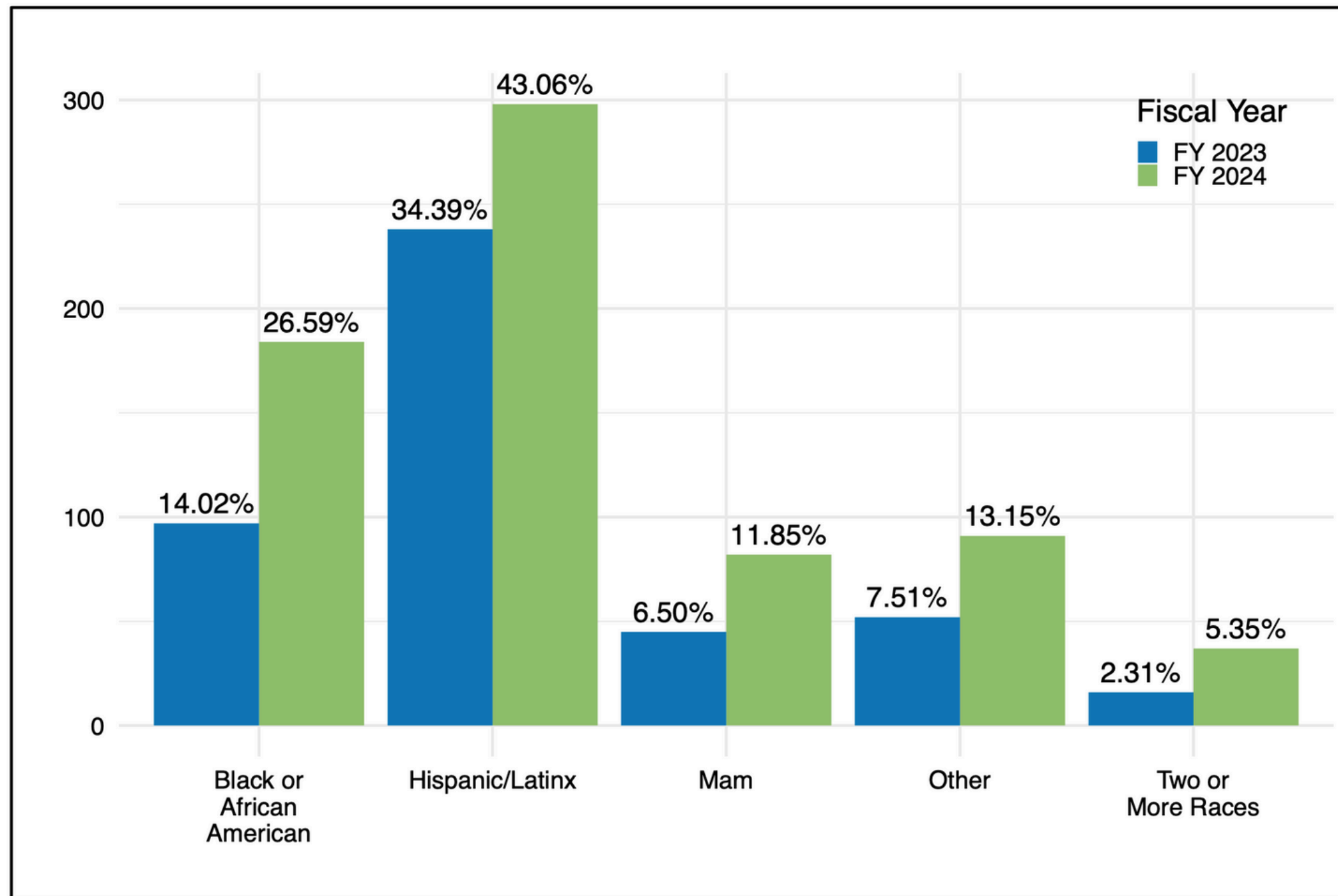
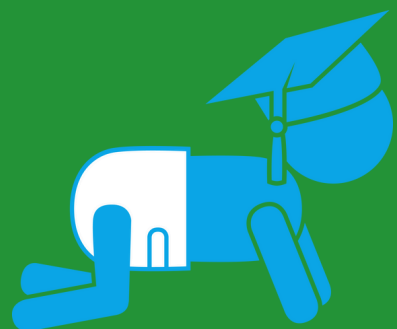
RBAs-At-A-Glance

Metric	FY2023 (Baseline)	FY2024 (New Data)
How Much?		
1. Number of College Savings Account sign-ups (% of eligible population)	445 (27.8% of eligible population)	692 (43.25% of the eligible population)
2. Number and annual percentage change of children (up to 8th grade) enrolled in up to \$500 early college scholarships	638	1627 (155% increase)
3. Number of Oakland 12th graders awarded scholarships and total amount of scholarship funds awarded	909 scholarships (\$3,648,300)	1170 scholarships (\$4,582,000)
4. Number of Medi-Cal eligible caregivers (0-23 months) receiving financial coaching (% of eligible families)	387 (86.9% of eligible families)	387 (67.3% of eligible families)
5. Number of Oakland caregivers and students in college and career identity-building programs	5505	16,858
6. Number of Oakland Promise scholars receiving postsecondary persistence support	1458	1981
How Well?		
1. Percentage of Medi-Cal eligible caregivers (0-23 months) demonstrating a college-bound identity for their children	This is a new metric. Baseline data is unavailable.	83.69%
2. Percentage of Oakland students in Oakland Promise programs demonstrating a college-bound identity	This is a new metric. Baseline data is unavailable.	69.55%
3. Total annual scholarship funds distributed to Oakland Promise scholars in postsecondary education	\$2,193,883	\$2,523,352
4. Impact of Oakland Promise funds on postsecondary education affordability for scholars	This is a new metric. Baseline data is unavailable.	Refer to metric for qualitative data
5. Postsecondary enrollment rate for Oakland Promise scholars vs. Oakland Unified graduates and national rate for students coming from low-income schools	86.6% (OP) 49.5% (OUSD) 52.4% (National rate)	83.3% (2023 OP scholars) 54.9% (OUSD)
6. Year 1 to Year 2 persistence rate for Oakland Promise scholars	83.4%	87.14%
Who is Better Off?		
1. Postsecondary completion rate for Oakland Promise scholars vs. Oakland Unified graduates and the national rate for students coming from low income schools	54% (OP) 34% (OUSD) 29.2% (National Rate)	51.2% (OP) 28.45% (OUSD)
2. Postsecondary education completion rate for all Oakland public school graduates	Data Not Available	Data Not Available



COLLEGE SAVINGS ACCOUNT ENROLLMENT

We enrolled 692 babies in FY24, 247 more babies this year than our baseline year - a 56% increase!

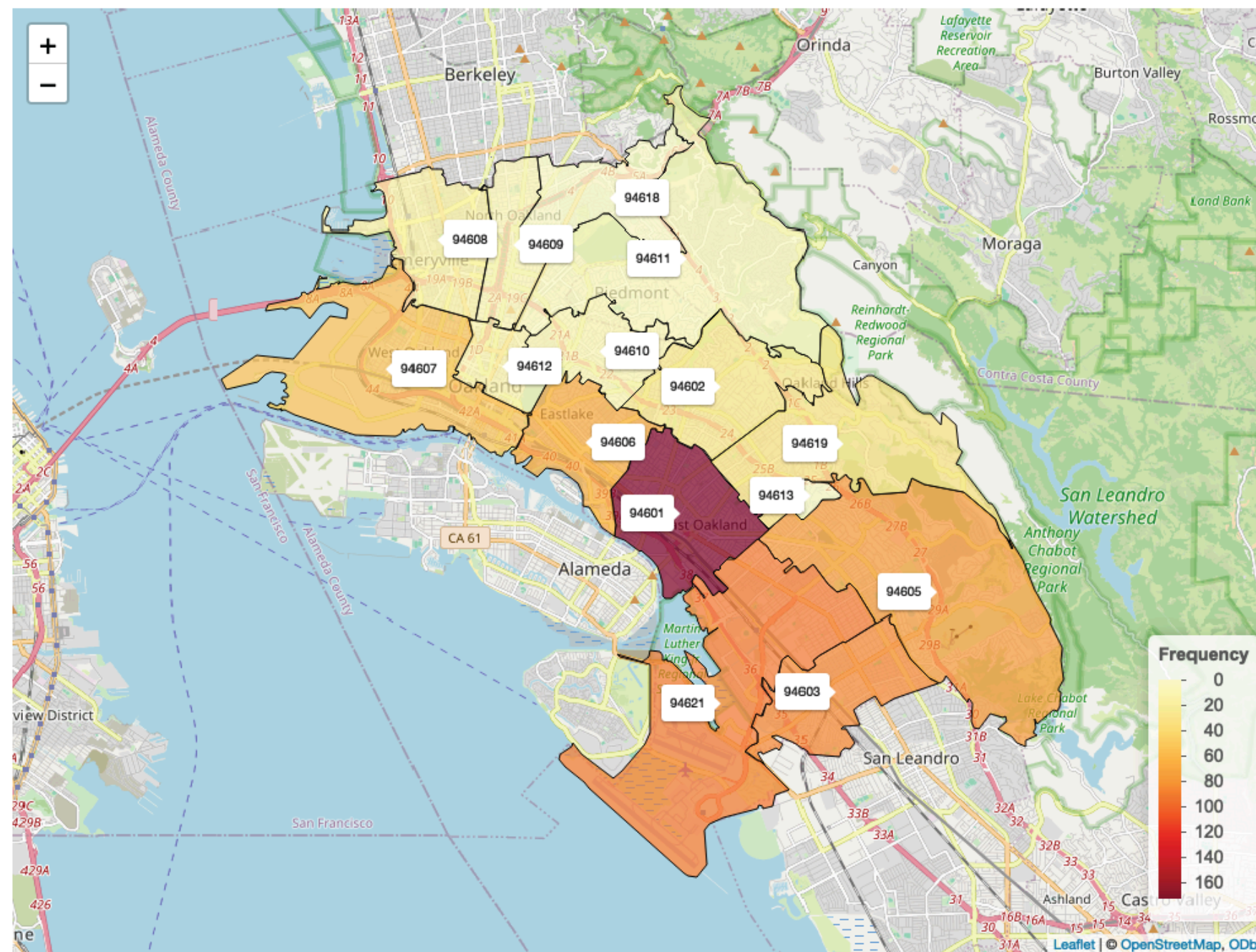


Baby Enrollments by Race/Ethnicity for FY23 Baseline and FY24 New Data



COLLEGE SAVINGS ACCOUNT ENROLLMENT

Our data disaggregations show that we are reaching our target populations (Medi-Cal eligible families and families of color) and focusing on East Oakland residents.

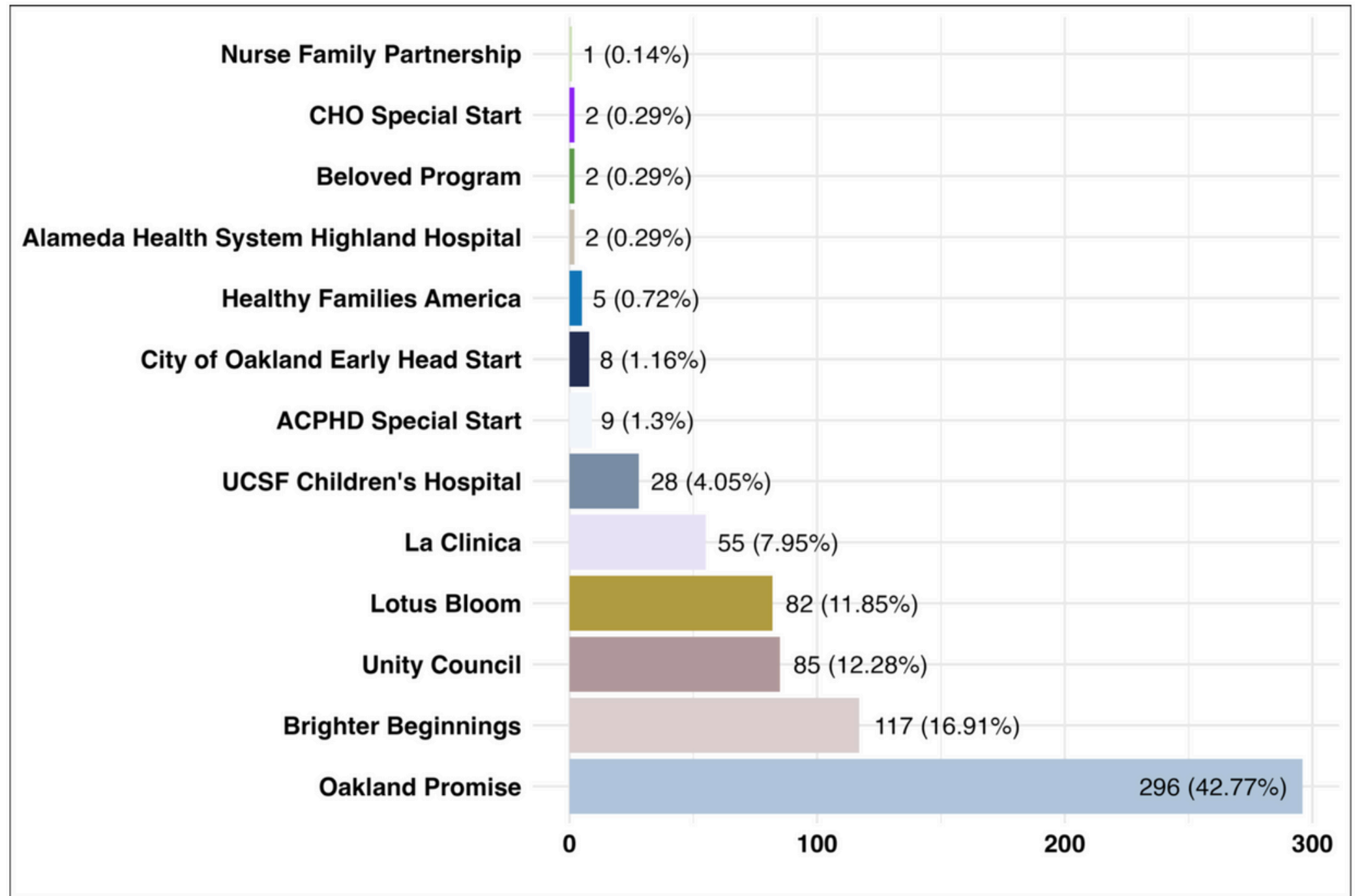
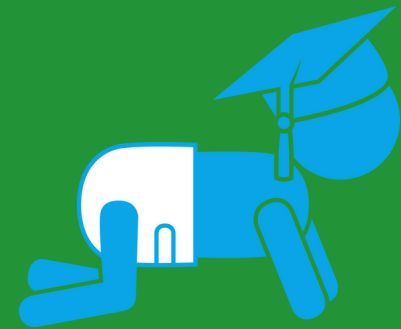


Baby Enrollments by Zip Code



ENROLLMENT PARTNERS

Over 50% of families were enrolled by partner organizations. Lotus Bloom, Brighter Beginnings, and Unity Council were the partners who enrolled the largest share of families this year.



Number of Baby Enrollments by Enrolling Partner



K2C ENROLLMENT

More children than ever signed up for K-7th scholarships! We signed up 1,627 students - a 155% increase from baseline.

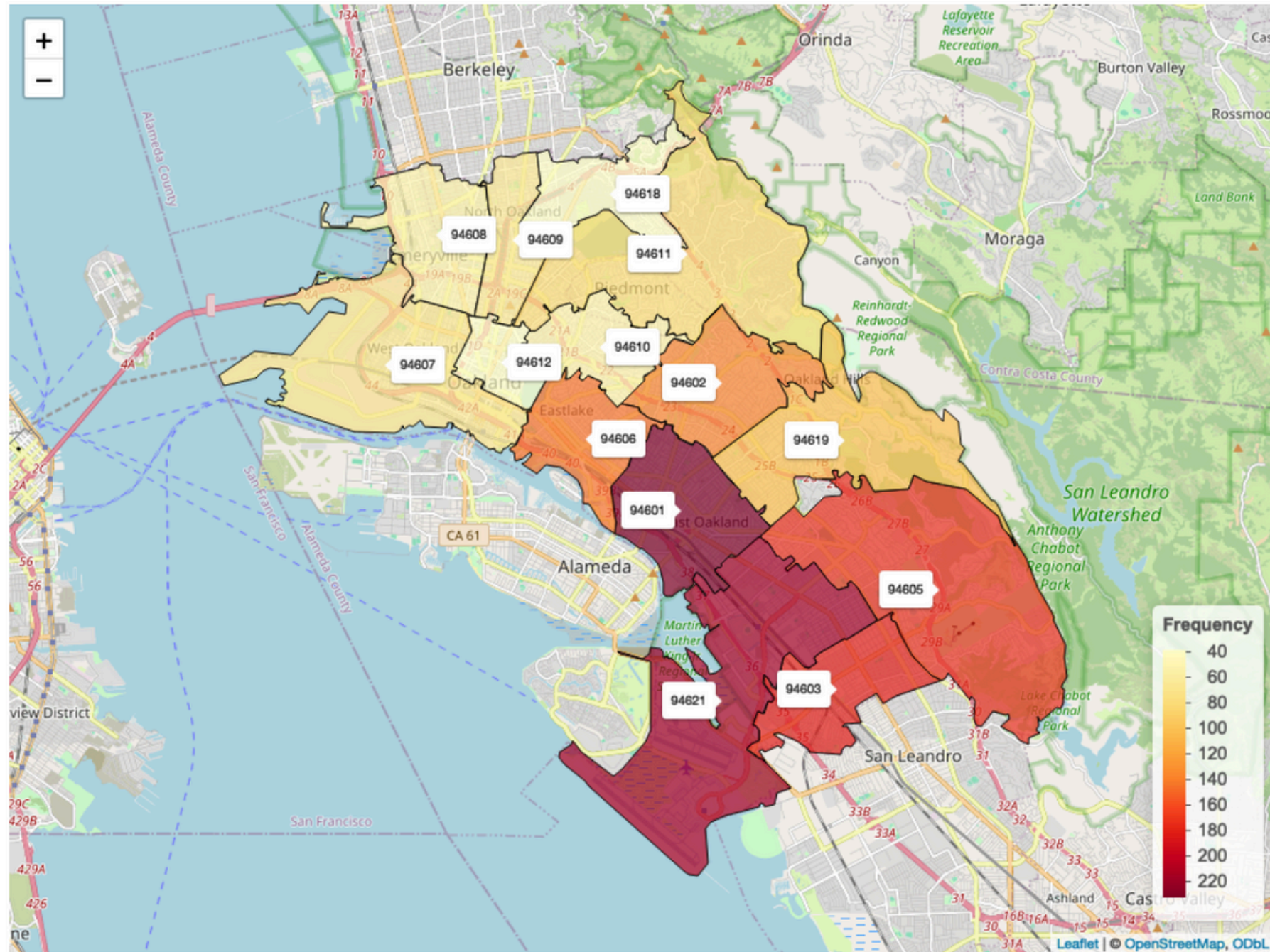
Our collaboration with OUSD furthered our reach by using digital communication strategies and onsite sign ups.



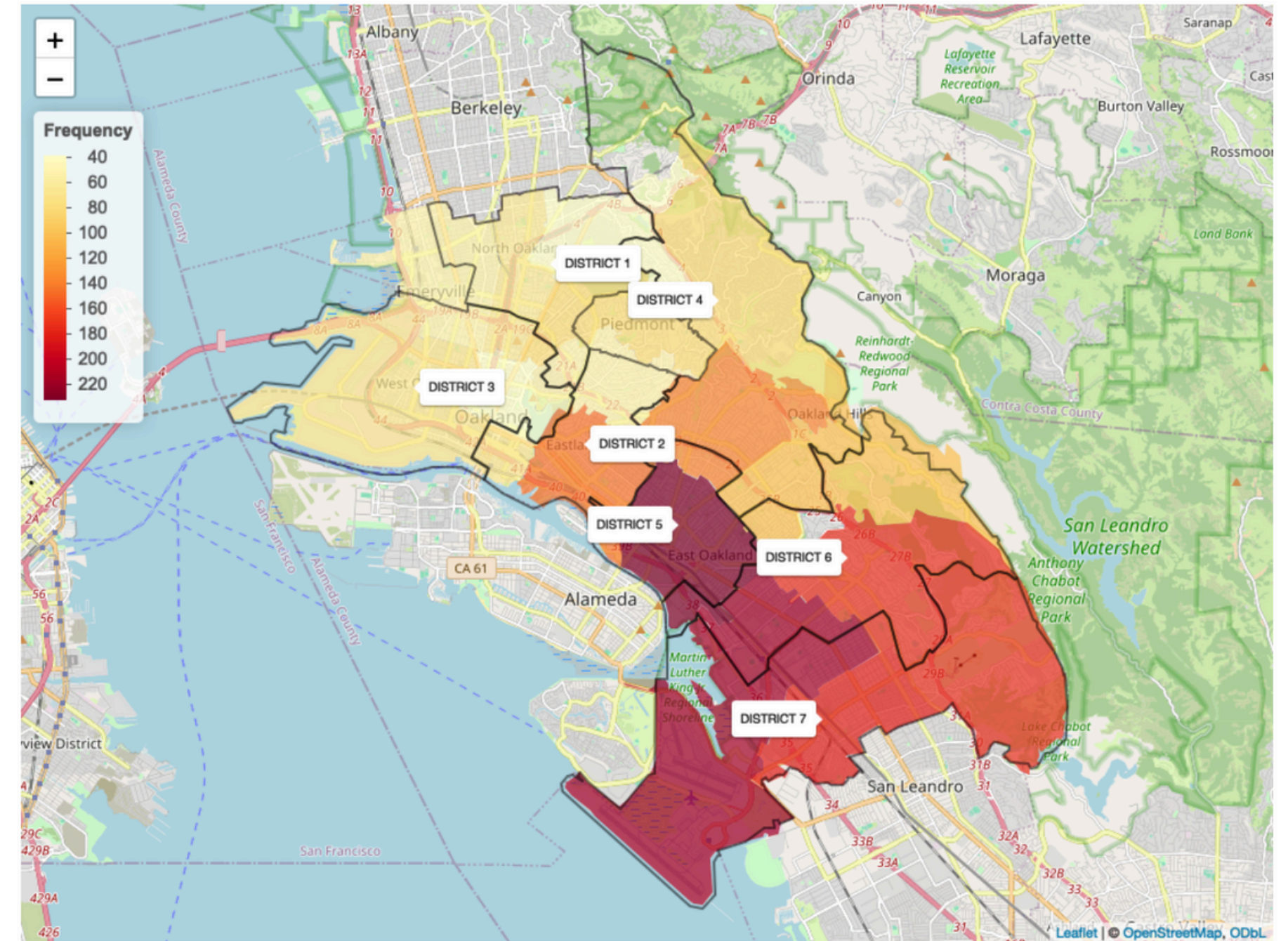
Total FY 24 K-7th Grade Scholarship Sign Ups



Total FY 24 K-7th Grade Scholarship Sign Ups



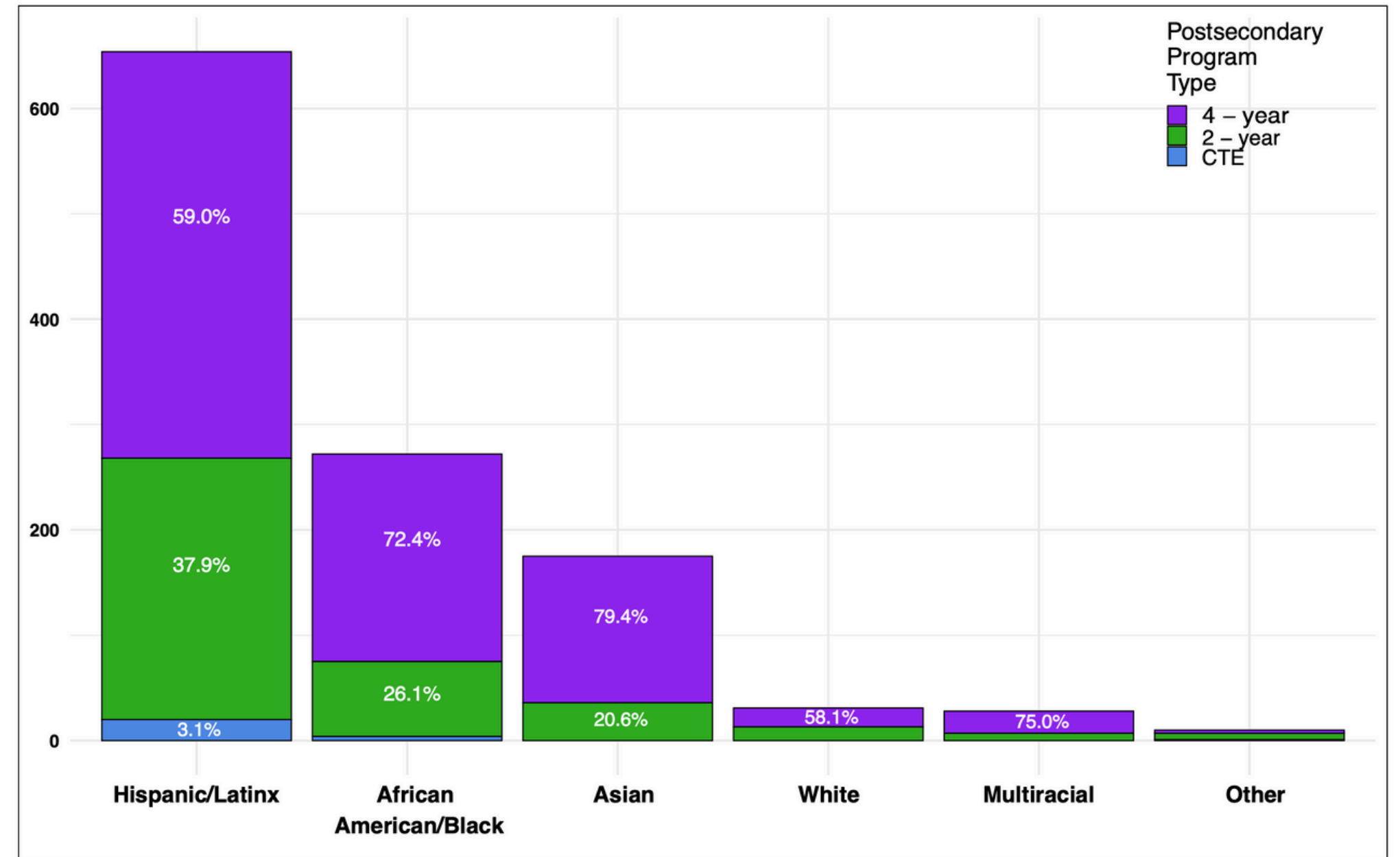
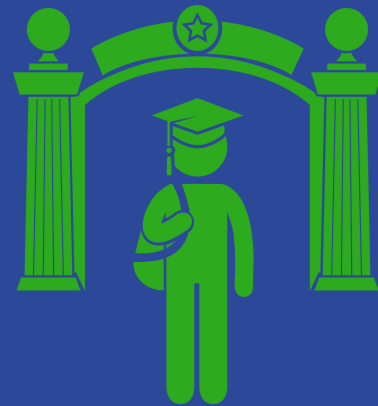
Scholarship Enrollments by Zip Code



Scholarship Enrollments by City Districts

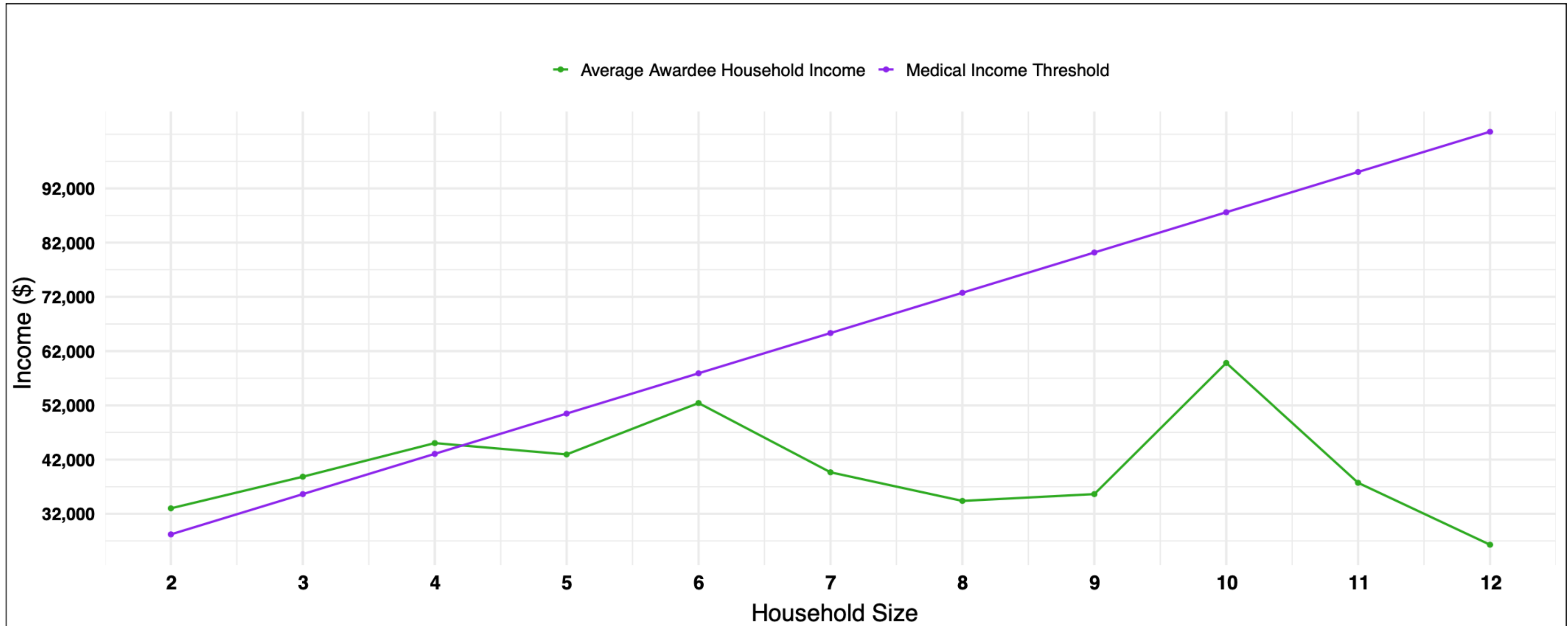
COLLEGE ACCESS

We awarded 1,170 12th grade scholarships for a total of \$4.58M to income-eligible graduating Oakland public school students for their postsecondary education - a 29% increase from baseline.



Awarded Scholars by Race/Ethnicity and Postsecondary Program Type



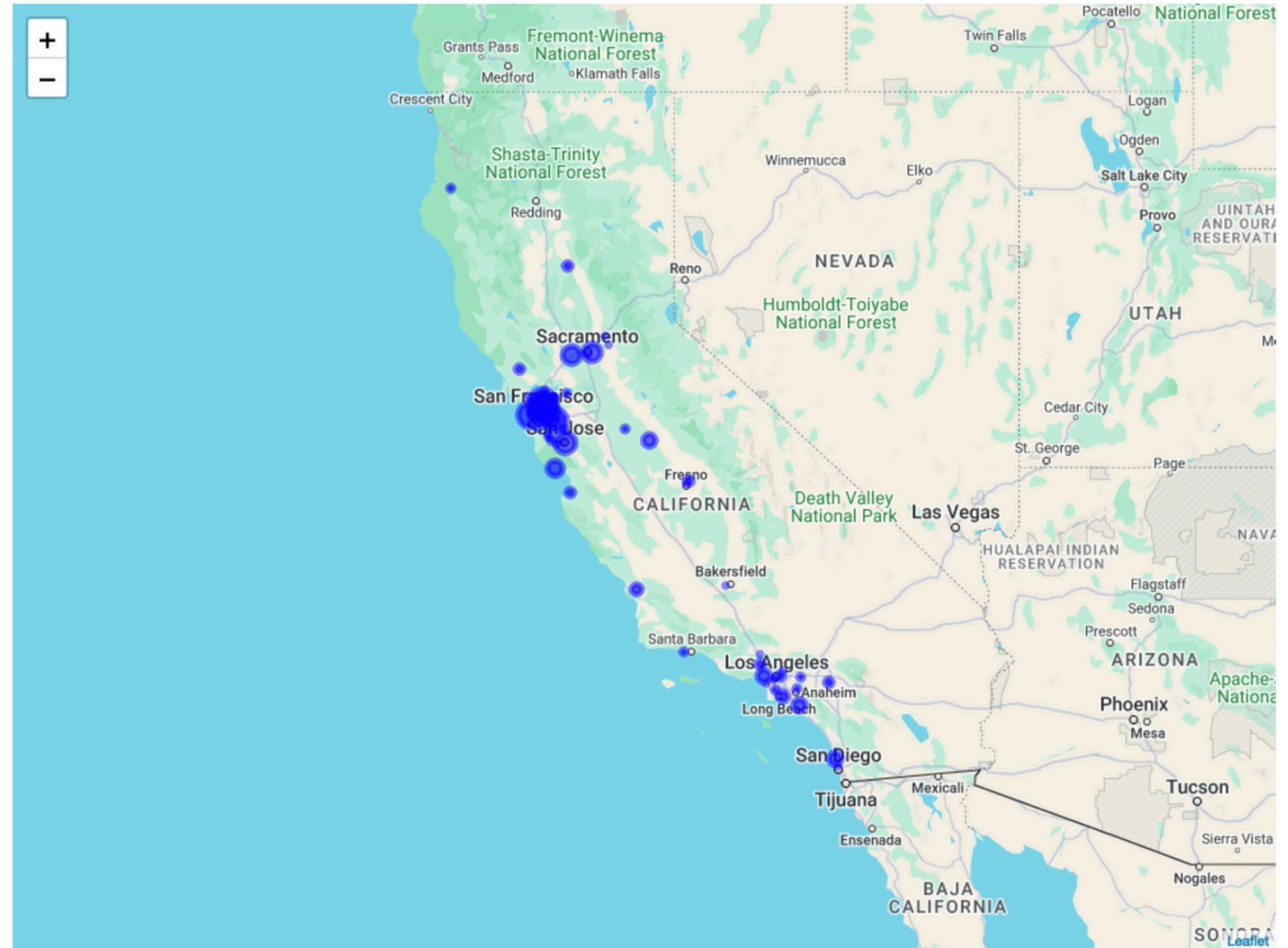
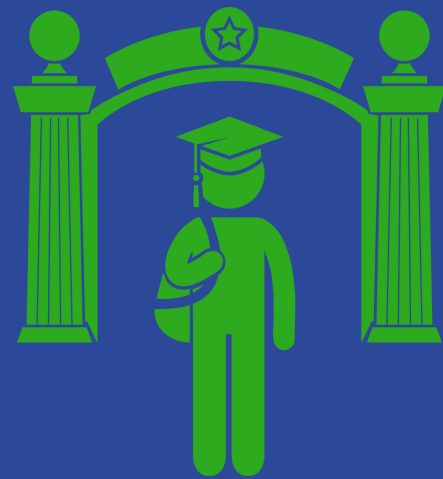


Awarded Scholars' Household Income Relative to Medi-Cal Eligibility



COLLEGE ACCESS

92% of OP scholars plan to attend colleges in California; the other 8% plan to attend colleges in North America.

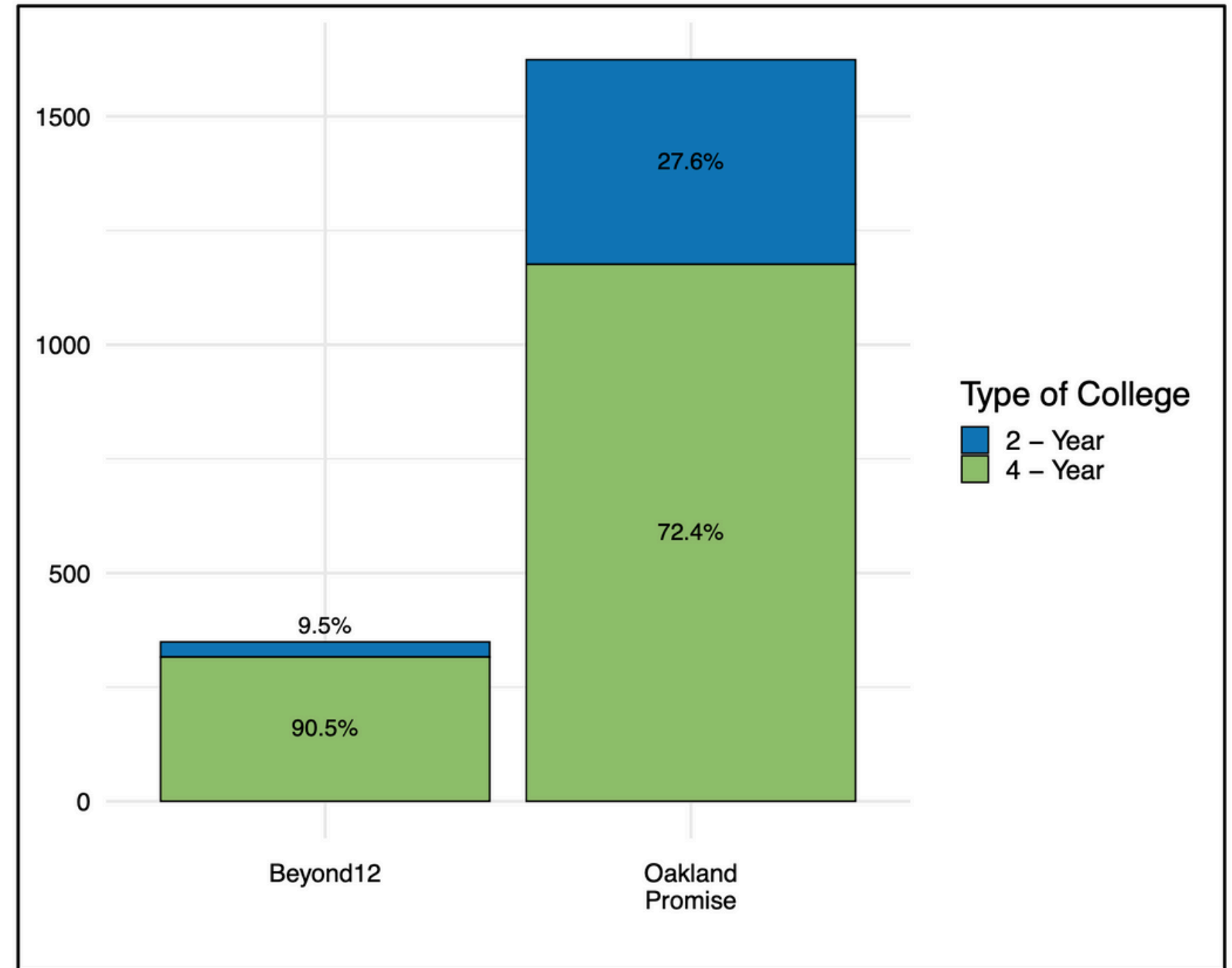


92 % of scholars plan to attend college in California



PERSISTENCE SUPPORT

Support for these students includes an OP or Beyond12 staff member assigned as their adviser for personalized support.

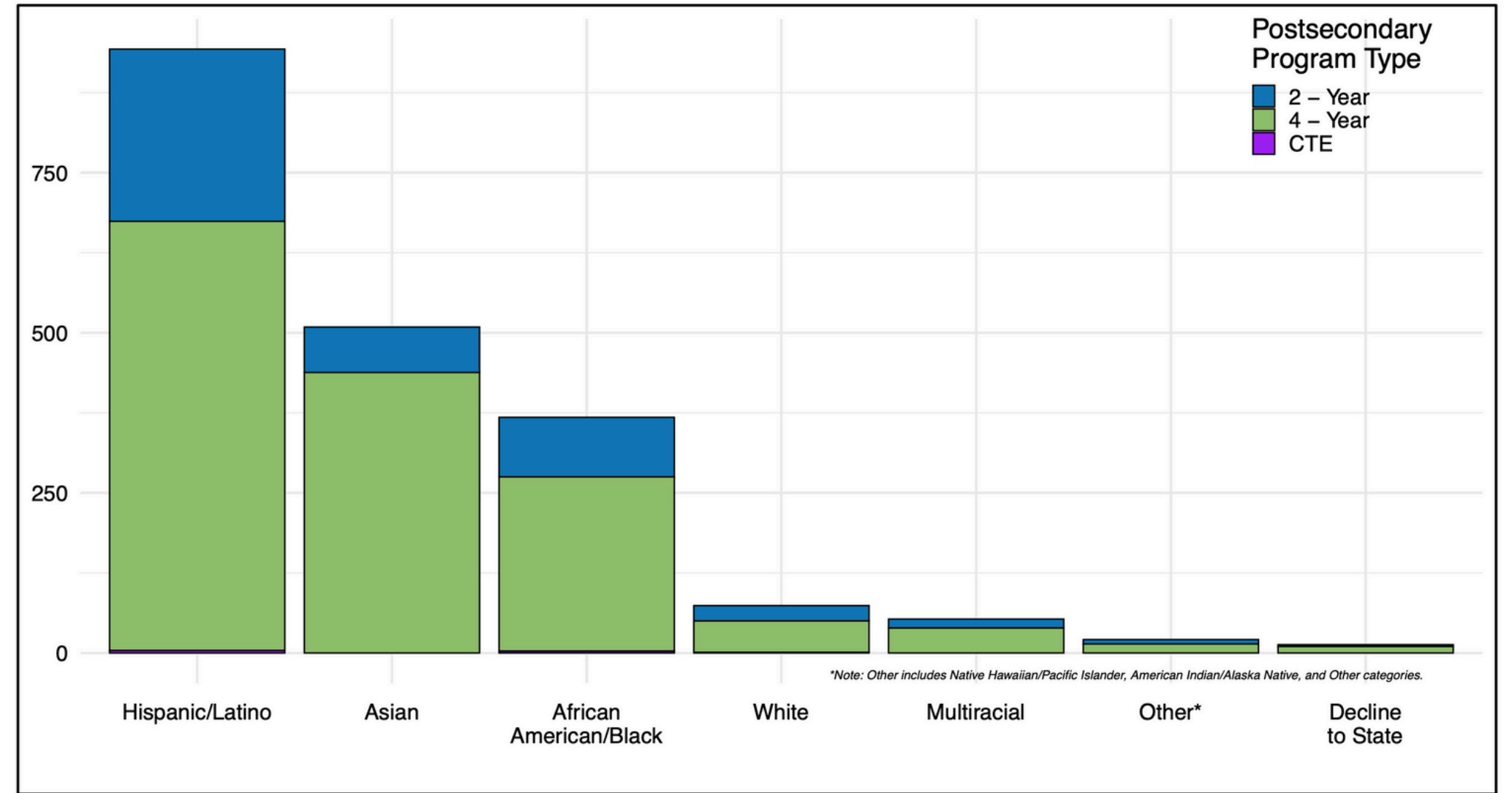
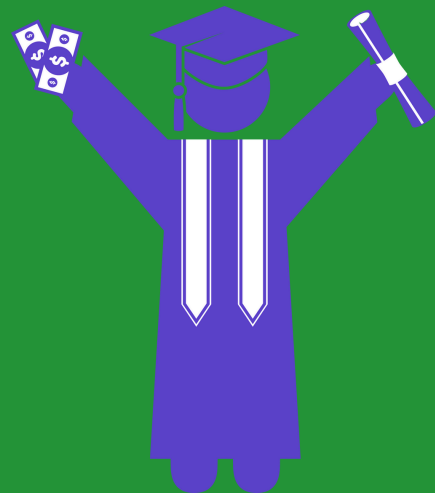


Scholars Receiving Persistence Support by Advising Organization and Type of College



PERSISTENCE SUPPORT

We supported 1,981 scholars during their postsecondary journey - a 523 student increase since baseline!



Scholars Receiving Persistence Support by Race/Ethnicity and Type of College



PERISISTENCE RATES

Our persistence rate this year is 87.14%. Comparatively, nationally, students from low income high schools persisted at a rate of 75.5%, showing that OP scholars are persisting at higher rates than a national comparison.

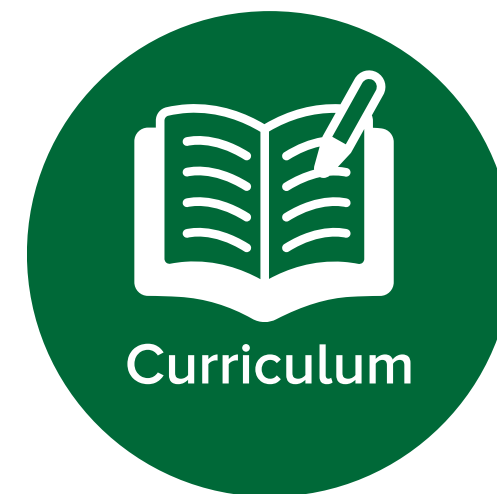


Persistence by Degree Type

College Type	Did Not Persist	Persisted	Percent
2 - Year	46	143	75.7%
4 - Year	38	424	91.8%
CTE	0	2	100.0%

OCI Partner Support

Peralta Community College District, FutureMap, 5 Buckets Foundation, and Youth Beat support our targeted advising approach to support students' goals.



Curriculum



Referrals



Data Sharing

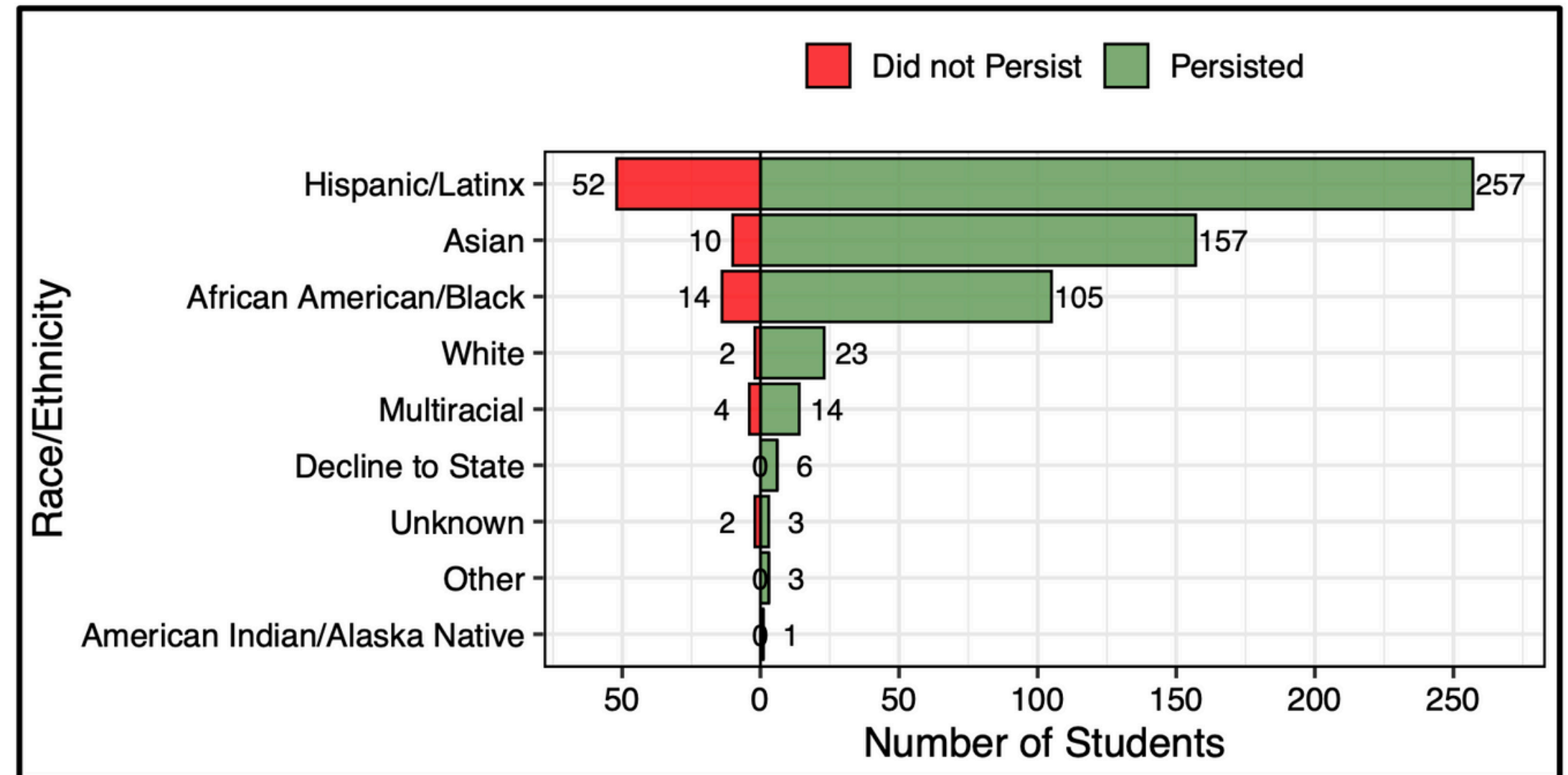


PERSISTENCE RATES

Additional disaggregations for persistence rates include persistence by race/ethnicity.



Number of students who persisted by Race/Ethnicity



SCHOLARSHIP IMPACT

Our scholars share in their own words that the 12th grade Oakland Promise scholarship funds have a significant impact on the ability of scholars from Oakland to afford and thrive in postsecondary education.



"This generous scholarship has significantly impacted my college journey, not only by easing the financial strain of tuition but also by making housing and groceries more affordable."



"This scholarship gave me the security that I would have some financial support in the school year. It allowed me to be confident going into the year."

Scholarship Impact Categories



Work/Life Balance
12 mentions



Housing Expenses
11 mentions



Food & Groceries
11 mentions



Financial Stress Relief
8 mentions



School Supplies
8 mentions



Overall Impact
6 mentions



Tuition & Fees
6 mentions



Transportation
5 mentions



Emergency Support
3 mentions



Academic Focus
3 mentions



COLLEGE COMPLETION

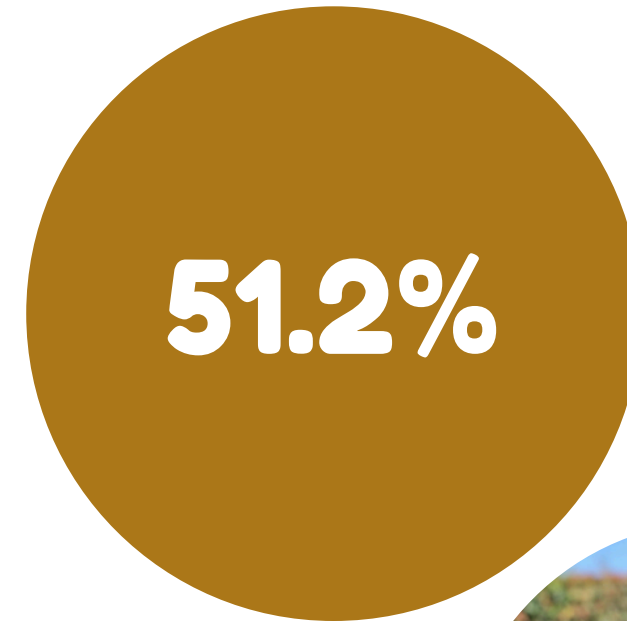
Over 50% of Oakland Promise-supported postsecondary scholars completed a degree program within six years of college graduation!



FY 24 Postsecondary Completion Rate

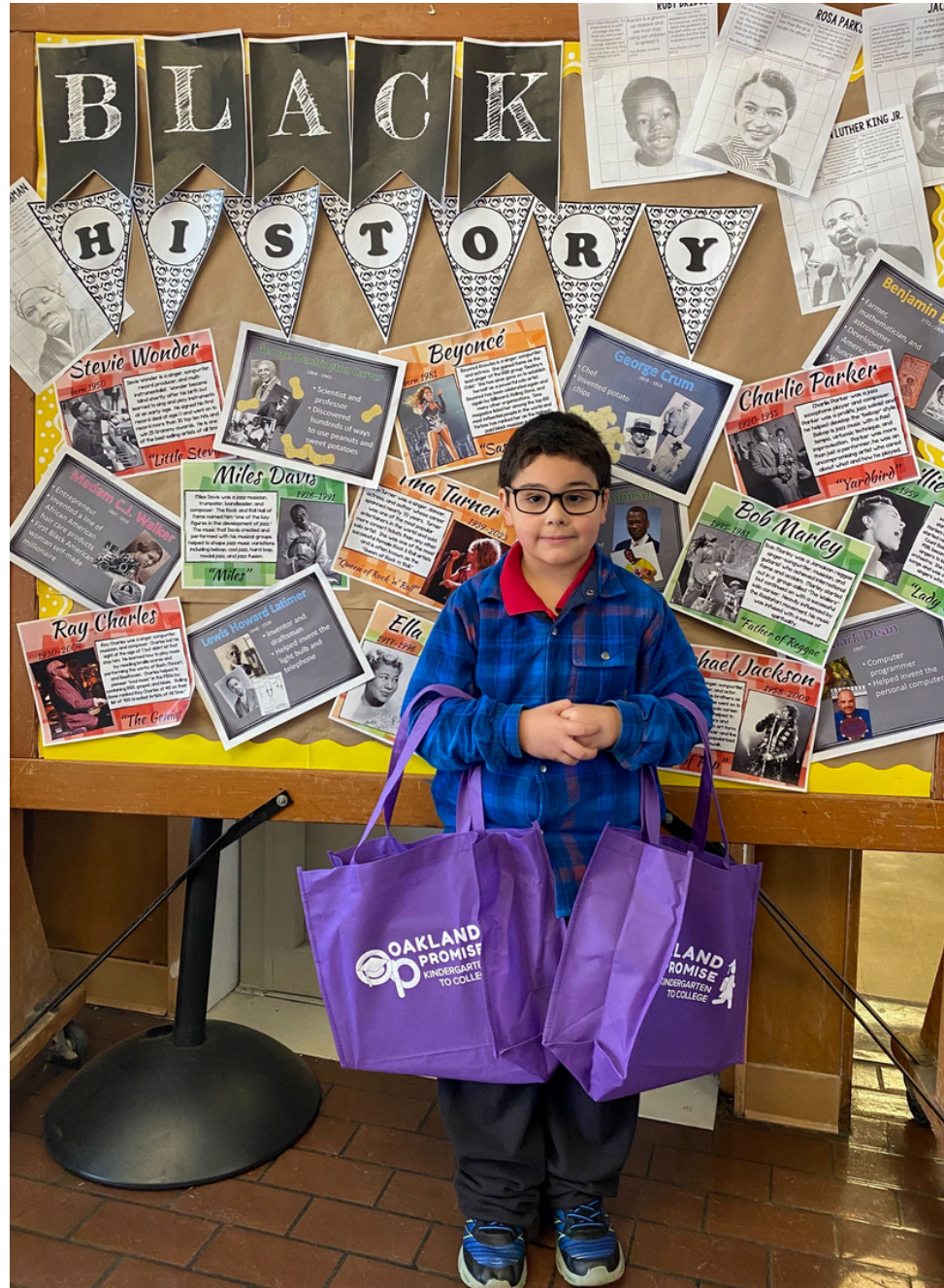
Oakland Promise

OUSD



Source: RBA Report
page 29





LOOKING FORWARD

Scaling Programs with Proven Strategies

Oakland Promise is cultivating partnerships with 30+ organizations to carry out our 5-year goals, while simultaneously maximizing efforts to subcontract with small and local businesses and nonprofits.

Strengthening Accessibility & Reach

Oakland Promise is expanding our targeted outreach strategies to reach more of the community and increase accessibility to services, scholarships, and support.

Infrastructure & Partner Development

Oakland Promise is adapting its structure and processes to better serve as a central coordinator and facilitator of collective impact as a backbone and direct service organization.



FY 25 GOALS

1,000

babies and families start saving early for college



2,000

sign ups of K-8th scholarships



1,300

12th grade scholarships awarded





OP IN THE COMMUNITY

Oakland Promise prioritizes being out in the community to cultivate a movement to support Oakland students and families.

Join us in community!



ANNUAL REPORT

Oakland Promise will be publishing our FY 24 Annual Report to share our collective impact and highlights from this past year.



COMMUNITY BRIEFING

Oakland Promise will host an in-person event that will showcase our programs and partners' work with the community.



COMMUNITY EVENTS

Oakland Promise will be attending the Kith Connections Event, OUSD Back to School events, CSU Event @ Fremont HS, and doing ongoing tabling throughout the city at schools, health clinics, and partner organizations.

FY25 Reporting Narrative

Introduction

Oakland Promise (OP) is placing a strong emphasis on its role as a **fund manager and backbone organization by leveraging public investment**. This shift reflects a more strategic positioning of the organization within the broader educational ecosystem of Oakland. By acknowledging the increased staff effort and shifting roles resulting from the Oakland Children's Initiative (the Initiative) fund management, OP is adapting its structure and processes to better serve as a central coordinator and facilitator of collective impact. This includes investing in tools and strategies to build key relationships with public sector stakeholders and community-based organizations. The organization is also committed to creating clear and concise annual reports to demonstrate its impact, further solidifying its position as a trusted steward of community resources and a catalyst for educational advancement in Oakland.

These strategic investments and shifts demonstrate OP's commitment to evolving its approach to meet the changing needs of Oakland's students and families while maximizing the impact of the Initiative. By focusing on scaling proven strategies, strengthening community relationships, investing in organizational capacity, and embracing its role as a backbone organization, OP is positioning itself to drive significant progress towards its cradle-to-career vision for Oakland's youth. In the 2024-2025 year, we will be implementing the following changes in alignment with our four main strategies:

Strategy 1 - Fund postsecondary education through college savings accounts and scholarships: Our Brilliant Baby (BB) program is expanding its reach and services, broadening its enrollment eligibility criteria from 0-23 months to 0-47 months and increasing the number of financial coaches. A notable change is the introduction of financial coaching groups and classes to meet increased demand. BB will also offer two extra hours of one-on-one coaching for highly motivated parents. We will group clients for financial literacy classes, allowing us to meet increased demand and eliminate client wait times while maximizing the reach of funding for this resource. BB is strengthening its referral incentive for current clients and has re-established UCSF Children's Hospital as an enrolling partner.

Kindergarten to College (K2C) is intensifying its efforts to scale the sign up process for families for the K-8th grade scholarships (\$100-500). To do so, we are in the process of working alongside OUSD leadership to integrate this sign up process into the registration process beginning next school year. Additionally, we're piloting a new teacher stipend program, an incentive we expect will significantly increase engagement with this program and lead to more students accessing the scholarship. At the high school level, **College Access (CA)** is introducing a new workshop series for 9-11th graders that will complement and build on the workshops that K2C delivers in elementary schools, and streamline scholarship application processes to meet increased scale. New partnerships with organizations such as The Hidden Genius Project, OneGoal, PeerForward, Unity Council, MOCHA, Trybe, and uAspire will support scholarship application completion efforts as we increase the number of awards by ~200 students / a 20% or more increase year over year until fully scaled– or 1,300 awardees the 2025 fiscal year.

Strategy 2 - Provide college-bound identity programming: K2C will be expanding its college visits from four to six and piloting a career visit. A new college/career conference for 3rd and 4th graders is also in the works. K2C is also forging new partnerships with organizations like Families in Action, Junior Achievement, Oakland Leaf, and The Unity Council to meet scholarship sign up and college-bound identity goals. In its middle school program, CA will leverage partners to assist with K-8th scholarship account sign-ups and increase college visits from four to eight, including innovative virtual reality college tours. The program aims to increase touchpoints with school sites through events like "supper & savings" and "coffee with principal" in service of our college-bound identity strategy. Additionally, a new Director of K-12 position will be created to align the K2C and CA programs, providing a unified experience for students and families and consolidating a workstream that had been previously held by two director roles. The Director of K-12 will serve as the main liaison with OUSD and principals, ensuring smooth transitions from 5th to 6th and 8th to 9th grades.

Strategy 3 - Provide postsecondary persistence programming: College Completion (CC) is preparing to serve approximately 20% more Scholars than last year (or 200 more Scholars for a total of about 1,300). CC is also enhancing its onboarding process for the Class of 2024, including high school visits and summer orientations. Partnerships with organizations like FutureMap and 5 Buckets will help CC to develop curriculum and workshops focused on postsecondary persistence, completion, and career development. Also, an increased contract award amount for the Beyond12 partnership will enable CC to meet demand from Scholars for advising. OP Advisors will increase their focus on direct service and quality touchpoints. The program is also introducing comprehensive Career Development services and addressing mental health needs through a partnership with California's Social Welfare program.

Strategy 4 - Engage in local and national leadership: OP as a whole is bolstering its staffing structure and systems to enhance its impact and effectiveness. A new Director of Partnerships has been hired to provide vision and leadership for community partnerships, strengthening OP's position as a backbone organization. This role will focus on convening partners more effectively, improving accountability around data, and further refining our RFP process. OP is also implementing an annual RFP process for all partners, including existing ones, and fine tuning this process with our learnings along the way. This process is also assessing along the way which partnerships have promise of continued success and which others might need to be piloted. We will continue to support partners in getting their S/LBE certification, building their data capacity and programming effectiveness, and holding them accountable for meeting performance goals. Across all programs, OP is promoting CalKIDS (California Kids Investment and Development Savings) activation, increasing alignment of metrics and program strategies, and enhancing its focus on data collection and evaluation.

Also, as part of the **East Oakland Promise Neighborhood (EOPN)** initiative to increase students' postsecondary success, OP successfully built on the Initiative's initial investment by securing federal funding and led ten CBOs, which collectively wield over 290 years of experience, in supporting three East Oakland schools (Castlemont High School, East Oakland PRIDE Elementary School, Elmhurst Middle School).

Reflecting on 2023-24¹

2023-24 Successes

OP is pleased to have met or exceeded its service delivery targets across all programs in fiscal year 2023-2024. Within BB, 692 babies and their families joined the program, a success we attribute in part to the broad reach and strong relationships that our enrolling partners have within the Oakland community. K2C saw a dramatic uptick in the number of families (1,627) enrolling in the \$100 early college scholarships; we believe that new use of email outreach and an online portal system in addition to in-person recruitment made this possible. CA awarded 1,170 scholarships for a total of ~\$4.59M to low income graduating Oakland public school students to go towards their postsecondary education, following along our goal of increasing scholarship awards by ~20% year over year until fully scaled. Finally, CC successfully supported last year's cohort of 1,980 Oakland Promise Scholars to persist through their postsecondary education and graduate—our partnership with Beyond12 and improvements to the CREWS peer advising program worked well to ensure we were able to offer multifaceted support to this larger cohort of students.

In 2023-24, EOPN collectively served over 1,900 students and families by providing schools with programs and case management services spanning health and school safety, basic needs assistance, socioemotional counseling, academic readiness, community-based internships, extracurricular activities, and more.

In a collaborative effort with the Initiative and First 5, OP also successfully developed our Results Based Accountability (RBA) metrics. Additionally, the rollout of our first RFP process saw \$17M requested through 62 unique applications from organizations across Oakland. Internally, the creation of our Impact & Evaluation team has increased our ability to make more data-informed decisions and better articulate our impact to the community. Complementing this work, our

¹ Represents the fiscal year spanning from July 1, 2023 to June 30, 2024.

Communications & External Affairs department took strides in integrating awareness-raising of the Initiative into our communications strategy.

2023-24 Challenges

BB saw a waitlist of over 50 clients for coaching services by the end of FY24. In **K2C**, delivering the Keep On Moving kits proved difficult logistically and absorbed an inordinate amount of staff time considering the service actually provided minimal interaction with students and educators. The program also encountered challenges in coordinating with teachers for college and career workshops with staff turnover being a factor. While K2C received positive feedback on the college field trips, it was difficult to communicate that we did not have the bandwidth to take all the students who wanted to participate. Challenges in **CA** included meeting the scholarship application and sign-up goals for 6th-12th graders; we struggled with a sign-up process that wasn't very user friendly, changes to the FAFSA application that were difficult to navigate, and simply the reach of our limited staff. **CC** identified challenges with student engagement, noting low participation in many workshops and events despite various outreach methods, pointing to the difficulty of building strong relationships with a growing number of students and meeting such an increasingly diverse cohort with tailored services.

In terms of our backbone function responsibilities, challenges came along with implementing new initiatives and taking on new responsibilities. While we are thrilled with the response from the RFP process, it was a challenge to develop the end-to-end systems it necessitated from legal considerations (e.g. contract development, etc), understanding the approval processes and requirements of the Initiative, and ultimately putting in place an accountability mechanism to ensure that we are able to assess our impact through these partnerships (reporting, etc) while managing the administrative work they entail (invoicing, contractual negotiations, etc.). The latter presented new challenges in data-sharing agreements and a need for additional leadership over this scope of work from our staff. The challenges informed our decision to create the Director of Partnerships role and a Contracts Manager position.

Major Learnings: Continue, Start, and Stop

In response to the waiting list challenge described above, **BB** has increased its budget for coaches and is innovating its service model. The program will transition from offering six hours of private coaching for each client to a combination of group financial literacy classes and two hours of private coaching. This change aims to serve more families efficiently while still providing personalized support. **BB** also learned the continued importance of key Oakland partners in outreach efforts, with organizations like Brighter Beginnings, UCSF, Unity Council, Lotus Bloom, and La Clinica playing crucial roles. Building on this, the program has increased staffing and budget for Unity Council, enabling them to expand their outreach to families living in Unity Council housing and add a Mam-speaking enroller. While Lotus Bloom chose not to continue as a contractor, Brilliant Baby has brought on new partners like BANANAS and Jasper Smith (an SLBE applicant) to support outreach, enrollment, and coaching efforts.

K2C will be partnering with an SLBE organization to handle kit deliveries to schools, freeing up staff time for more impactful activities. K2C has also created teacher stipend programs, empowering educators to teach college and career materials in their classrooms at convenient times and assist with parent scholarship sign-ups. Further, this program will increase the number of field trips, start them earlier in the fall, and aim to include all 5th grade classes at participating schools. This change not only expands access but also aligns better with school schedules, avoiding conflicts with late-spring testing periods.

CA is contracting with additional SLBE partners to help meet scholarship sign-up goals and is refining the user experience of the sign-up process. The program is also piloting scalable programming initiatives, such as a stipend program for teachers to deliver college and career programming in their schools and exploring VR college visits. **CA** is building on successful elements by increasing the number of college visits for middle schoolers from 4 to 8 and expanding scholarship offerings for 12th graders from 1,170 to 1,300.

CC found success in outsourcing advising support to Beyond12, leveraging their national presence and expertise. The program will continue and potentially expand this partnership. To address unsatisfactory attendance rates, the program is focusing on improving the scholar onboarding experience and strengthening advisor-scholar relationships through targeted outreach and increased touch points throughout the year. CC also recognized an increased interest from scholars in career development opportunities and internship support. In response, the program is expanding its career-focused offerings, including additional career conferences and developing curriculum in partnership with the FutureMap and 5 Buckets organizations.

Looking forward to 2024-25²

Major Themes: 2024-25 Program Plan and Budget

OP aims to achieve the eight goals of the Initiative using the RBA metric framework to track towards their fulfillment.

1. OP tracks socioeconomic and demographic data across our cradle-to-career continuum and integrates these into how we assess our RBAs; for example, in Brilliant Baby, activities are being adjusted to steer toward the enrolled population being reflective of the eligible population to serve our equity mission, namely with specialized efforts to increase enrollment of African American / Black families.
2. Our RBA metrics for Brilliant Baby and K2C track CSA and scholarship enrollments in addition to how these assets are accruing for families through their own savings/CSA contributions; we intentionally refined our financial literacy curriculum and communications in order to build awareness of opportunities for asset building.
3. In FY24 we created RBA metrics to specifically monitor college-bound identity in students and the educational attainment expectations of families for their children; our Impact & Evaluation conducted an extensive survey measurement process to better assess college-bound identity. This process included a clearer definition of what we mean by college-bound identity: 1) students feeling they belong in college; 2) students feeling that college is important and relevant for their career goals; and 3) that they are sufficiently prepared to succeed in college. The new metric has been developed with the feedback and input of our program participants; including focus groups in three languages with Brilliant Baby caregivers, and focus groups with 11th and 12th grade students in English and Spanish. The Impact & Evaluation team plans to implement this improved measurement in FY25, and to train our subcontractors in using this measurement as well to track our collective impact on college-bound identity across our continuum. College-bound identity is a key strategy for increasing college completion for our Oakland students.
4. The number of new Oakland Promise Scholars each year is a key measurement; disaggregating the data about these Scholars enables us to make programmatic adjustments to increase our effectiveness and reach—for example, targeting K-12 schools with higher needs and concentrations of eligible students.
5. Metrics tracking the number of scholarship dollars distributed *and* their impact on affordability is another new RBA metric created in the last year. The Impact & Evaluation team is collaborating with data science students at University of California Berkeley in FY25 to develop a conceptual framework of how our scholarships make college more affordable for students, and measurement to assess whether we are reaching this outcome.

RBAs 6 through 8: These goals include enrollment, persistence, and graduation rates; we continue to adjust activities in “summer melt” programing, quantity and quality of touchpoints with Scholars, and improve Mentor-Scholar matching, among other initiatives to drive these percentages upward. In FY24, our increased data capacity on the Impact & Evaluation team allowed for us to clean up our data infrastructure around these metrics, better utilize the National Student Clearinghouse data, and collaborate with College Completion staff to ensure these numbers are accurate and meaningful.

After one full fiscal year of the Initiative implementation, we have solid FY23 baseline data for many of the RBA metrics,

² Represents the fiscal year spanning from July 1, 2024 to June 30, 2025.

and now have reliable FY24 information to see what has been accomplished with the Initiative's support. As expected with an influx of resources, we saw quick changes and significant increase in the number and reach of our services and community partnerships. Changes that are slower to respond to resources include outcomes in students' and families' lives, and our overarching goal of increasing postsecondary completion. The Initiative is a long-term investment in Oakland students, and we worked hard to improve systems and build infrastructure to support the improvement of our outcomes and goals over the course of the 5-year initiative. We look forward to sharing how a long term investment, community organization collaboration, and more efficient and reliable systems will lead to meaningful change in college access and college completion for Oakland students in the long term.

Closing

As OP moves into the 2024-25 program year, several high-level takeaways from the program plan and budget highlight important investments and strategic shifts for the organization. These changes reflect a commitment to scaling impact, strengthening community relationships, and enhancing organizational capacity to meet the goals of the Initiative.

1. OP is intensifying its focus on **scaling programs and investing in proven strategies to meet the Initiative's goals**. This approach aims to ensure the longevity and quality of services for students and families in the years ahead. The organization is revisiting and updating its cradle-to-career scholarships and programming to align more closely with the Initiative's objectives. This includes continued direct engagement with students and families, maintaining high-quality one-on-one support through program technology such as text messaging services and on-demand appointment tools, and improving the organization's website to enhance accessibility of services. OP is cultivating partnerships with 30 organizations to carry out program goals, while simultaneously maximizing efforts to subcontract with small and local businesses and nonprofits. This balanced approach allows for expanded reach and impact while supporting the local economy.
2. **Strengthening relationships with the Oakland community** is a key priority. This investment is driven by the need to increase the number of students and families served, share the impact of the Initiative, and ensure that scholarships and programs remain responsive to the community's changing needs. To achieve this, OP is expanding its presence at major community events, increasing traditional and online marketing efforts, and continuing to invest in multilingual staff with cultural competency. The organization is also focusing on building stronger relationships with teachers, counselors, and school leaders to reach more students. Additionally, OP plans to host an annual community briefing to share its impact and invite community stakeholders to utilize its facilities, fostering a sense of shared ownership and engagement.
3. Oakland Promise recognizes the need to invest in **organizational processes and staff development**. This investment is particularly crucial given the increased staff effort and shifting roles resulting from fund management. The organization is committed to supporting staff in developing not only their program and data skills but also their ability to effectively leverage the Initiative's grantee partners in reaching organizational goals. Oakland Promise is also investing in administrative technology, data and evaluation tools, and legal services to review the Initiative-related contracts. These investments aim to enhance the organization's overall effectiveness and ability to adapt to its expanded role as a fund manager and backbone organization.

APPENDIX

TO

OAKLAND PROMISE NARRATIVE REPORT TO THE OAKLAND CHILDREN'S INITIATIVE

Oakland Promise - Oakland Promise is a cradle-to-career organization that supports Oakland youth to attain postsecondary education and enter into the careers of their choosing. Our vision is a thriving Oakland community without educational barriers to opportunity. We operate four core programs: Brilliant Baby (ages 0-5), Kindergarten to College (K-5th grades), College Access (middle and high school) and College Completion (postsecondary schools) and are the current college access implementing partner of the Oakland Children's Initiative.

Brilliant Baby - 0-5 years old - Brilliant Baby provides information and resources to families with children under the age of five with the intent to advance children's early learning and healthy development, improve families' financial well-being, and reinforce an early expectation of college and career success for all children. A core part of the program helps Medi-Cal eligible families open a child savings account (CSA) seeded with \$500 for their babies.

Kindergarten to College (K2) - K - 5th grades - K2C is focused on building a college-going identity in young children and provides college and career resources to schools, scholarships for all public school students, as well as support and incentives for their families to open CSAs.

College Access - 6th-12th grades - College Access is available to all Oakland public middle and high school students so that students understand, identify with, and apply to postsecondary options following high school graduation. Support for students includes assistance with filing the FAFSA/DREAM Act, finding good-match postsecondary schools and pathways, and completing admissions applications.

College Completion - 18 years old and above - College Completion works to ensure that students enroll in and graduate from postsecondary institutions or programs through a combination of persistence supports such as mentoring, advising, and scholarship distribution.



EARLY EDUCATION FUND: ONE YEAR OF IMPACT

FISCAL YEAR 2023-2024



FIRST 5 ALAMEDA COUNTY'S ROLE AS THE EARLY EDUCATION FUND IMPLEMENTATION PARTNER

Implementation Partner Legal Requirements specific to Section 1605(d):

1. Performance metrics and benchmarks;
2. Plans for consultation or engagement with experts, community members, and program beneficiaries;
3. Annual independent financial audits;
4. Data sharing agreements including disaggregation by race and income of program beneficiaries; and
5. Accounting practices that securely segregate Fund revenues and expenditures in order to ensure appropriate accounting of receipts and expenditures.



SYSTEM BUILDING HIGHLIGHTS

EARLY EDUCATION FUND FY 2023-24



Built system capacity and infrastructure to meet reporting and evaluation mandates (e.g., finance, data and evaluation, compliance, planning, and project management)



Initiated a Joint Public Systems Partners Leadership table for strategic implementation planning and decision-making



Set up multi-year contracts through 3 governing bodies and reached agreement on a definition of capacity as the ability to spend to promote administrative ease, flexibility, and avoid disruption of services



Established data sharing agreements and built data system capabilities that allow for the collection of individual level data that can be analyzed and used for reporting and evaluation



EARLY EDUCATION FUND PARTNER FEEDBACK FY 2023-24

INITIAL KEY SUCCESSES

Systems Collaboration
Data Collection + Analysis
Family Navigation
Professional Development
Capacity Investments
Facility Improvements

IMPLEMENTATION PARTNER VALUE ADD

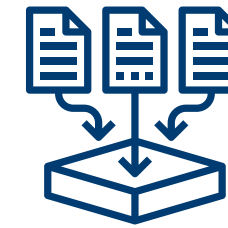
Finance + Budgeting Expertise
Project Management + Planning Capacity
Collaboration and Partnership Approach
Stakeholder Relationship (local, state, federal, political, philanthropic, etc.)
Administrative Flexibility
Multiyear Planning



EARLY EDUCATION FUND CONTINUED LEARNINGS FY 2023-24



Clarifying roles for decision-making and **accountability**



Establishing administrative agreements (e.g. data sharing, finance, permitting)



Investing in **capacity building, infrastructure** and administration



Telling the story of the Initiative



Refining the programmatic vision and identifying the **community partnership opportunities**



OAKLAND UNIFIED
SCHOOL DISTRICT
Community Schools, Thriving Students



CITY OF
OAKLAND
HEAD START



Oakland Family Demographics: Our Work in Context

Families in Oakland Face Financial Challenges



16% of Oakland children under 5 live in poverty (4,300 of 26,100)



80% of OUSD TK-12 students were socioeconomically disadvantaged in school year 2023-2024



12,800 of Oakland's 0-6 population, about 41%, are receiving Medi-Cal



5,900 of Oakland's 0-6 population, about 19%, are receiving CalFresh



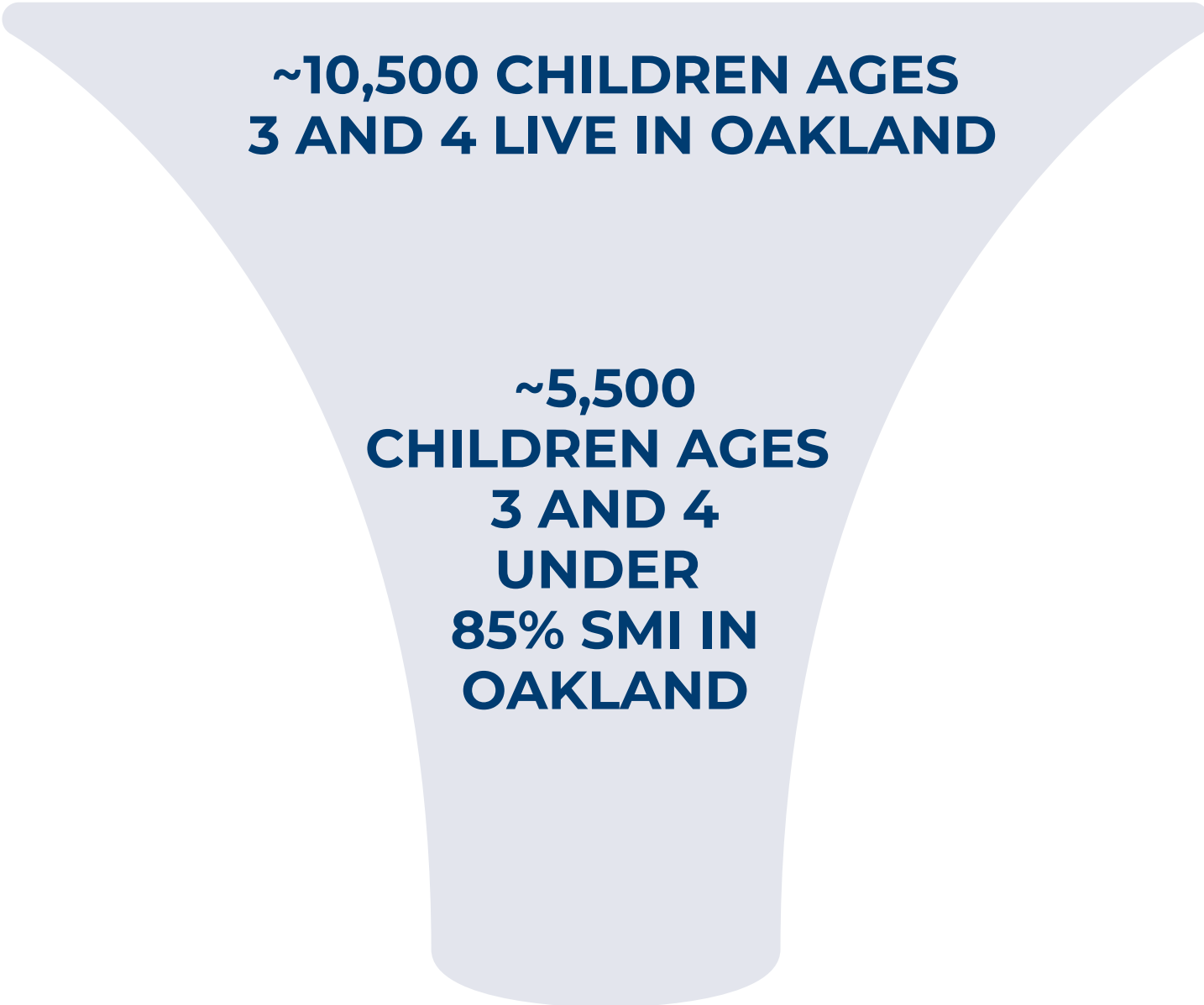
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Oakland Children's Initiative: Reaching Young Children



1 in 5 children (ages 3-4) in Oakland are enrolled in a site funded by the Initiative's Early Education Fund



1 in 3 children (ages 3-4) under 85% SMI in Oakland are enrolled in a program funded by the Initiative's Early Education Fund





OAKLAND UNIFIED SCHOOL DISTRICT

FISCAL YEAR 2023-2024



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Early Education Fund: OUSD

Top Investments by Type, FY 2023-2024


\$8.1M INVESTED IN OAKLAND UNIFIED SCHOOL DISTRICT (OUSD)

 \$1.8M invested in **direct staff** (27 FTE) in OUSD (e.g., Early Learning Coaches, Family Navigators)

 \$4.2M invested in **capital projects** (infrastructure)

 \$498K invested in **infrastructure** (7 FTE) in OUSD (e.g., Directors, Program Manager Kindergarten Readiness, Project Manager)

 \$339K invested in **professional development and coaching** for OUSD educators

 \$664K invested in **capital improvements** (painting and murals, fencing, and classroom improvements)

 \$233K invested in **classroom materials**





CITY OF OAKLAND HEAD START

FISCAL YEAR 2023-2024



OAKLAND UNIFIED
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Community Schools, Thriving Students



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OAKLAND
HEAD START



Early Education Fund: COOHS

Top Investments by Type, FY 2023-2024

\$2.7M INVESTED IN CITY OF OAKLAND HEAD START (COOHS)



\$2M invested in **direct staff** (36 FTE) in COOHS (e.g., Center directors, educators, cooks, mechanics, couriers, and Family Services Specialist, School Readiness Coordinator)



\$401K invested in **infrastructure** (6.4 FTE) in COOHS (e.g., Admins, Supervisors, Facility Coordinators, Project Manager, Data Analyst, Compliance Supervisor)



\$61K invested in **capital maintenance**



\$59K invested in **classroom materials**



\$55K invested in **professional development and coaching** for COOHS educators



OAKLAND UNIFIED
SCHOOL DISTRICT
Community Schools, Thriving Students



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OAKLAND
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RESULTS BASED ACCOUNTABILITY OVERVIEW

FISCAL YEAR 2023-2024



OAKLAND CHILDREN'S INITIATIVE EARLY EDUCATION FUND: RBA METRICS

HOW MUCH?

RBA MEASURE	JANUARY - JUNE 2023	RBA MEASURES FY2023-2024		
		GRAND TOTAL	COOHS	OUSD
Number of free and subsidized slots by program type	2,660	2,815 ↑	52	2,763
Number of children enrolled in priority partner sites (OUSD & OHS)	1,943	2,062 ↑	19	2,043
Number of ECE educators	244	261 ↑	7	254
Additional capacity from OCI funded capital infrastructure improvements	66	0 ↓	0	0
Number and percentage of sites receiving OCI funded capital infrastructure improvements	2%	10% ↑	0	6 (11%)
Average number of hours ECE educators and staff participated in training/coaching/ and Professional Learning Communities (PLC)	n/a	31.7	35.2	31.6

OAKLAND CHILDREN'S INITIATIVE EARLY EDUCATION FUND: RBA METRICS

	RBA MEASURE	JANUARY- JUNE 2023	RBA MEASURE FY2023-2024		
			GRAND TOTAL	COOHS	OUSD
HOW WELL?	Percent of free and subsidized slots enrolled (uptake)	73%	73%	37%	74%
	Retention rate for ECE educators	n/a	89%	67%	90%
	Number and percentage of ECE educators and staff who report the quality of trainings were good or very good	n/a	n/a	n/a	356 (94%)
	Number and percentage of children enrolled in an improved ECE facility due to OCI funded capital infrastructure improvements	81 (4%)	374 (18%) ↑	0	374 (18%)
IS ANYONE BETTER OFF?	Percentage of OCI sites with a quality rating above standard	100%	100%	100%	100%

OAKLAND CHILDREN'S INITIATIVE

NUMBER OF FREE AND SUBSIDIZED SLOTS AND ENROLLMENT

PERCENT OF FREE AND SUBSIDIZED SLOTS ENROLLED (UPTAKE) FY23-24

SYSTEM PARTNER	ENROLLMENT	FREE & SUBSIDIZED SLOTS	PERCENT ENROLLED
COOHS	19	52	37%
OUSD	2,043	2,763	74%



OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

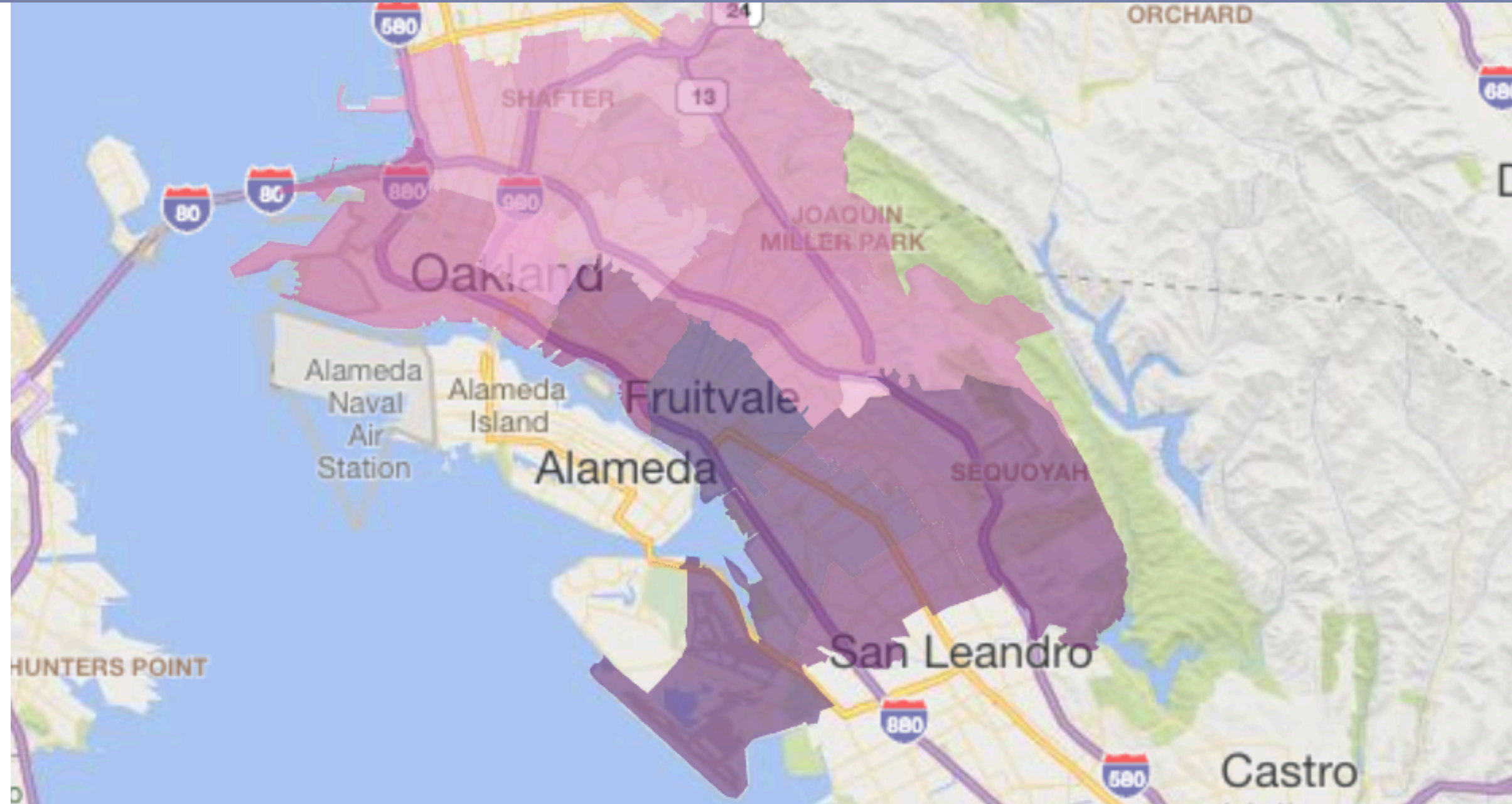


CITY OF OAKLAND
HEAD START



OAKLAND CHILDREN'S INITIATIVE

ENROLLMENT BY HOME ZIP CODE



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Community Schools, Thriving Students



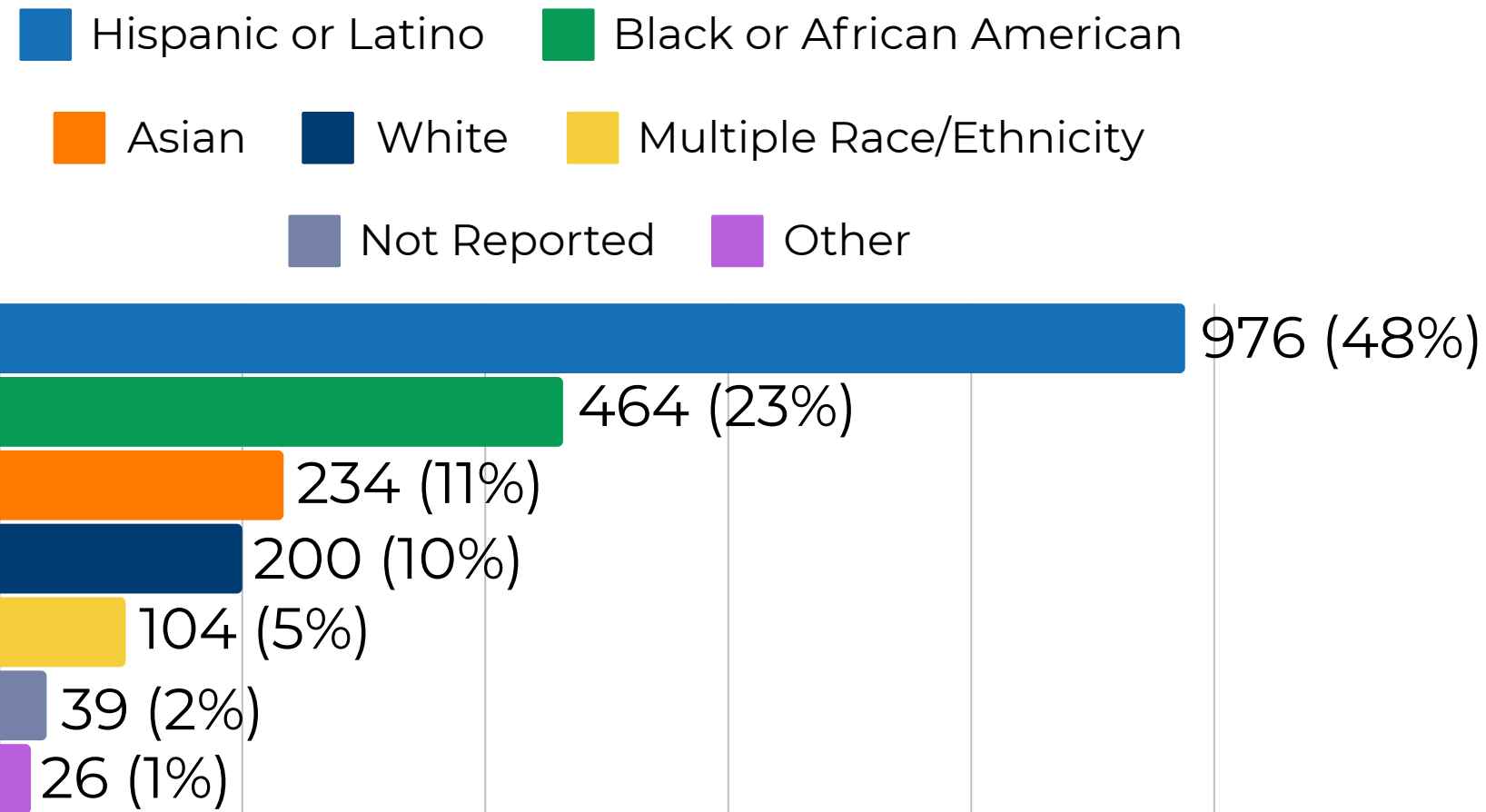
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OAKLAND
HEAD START



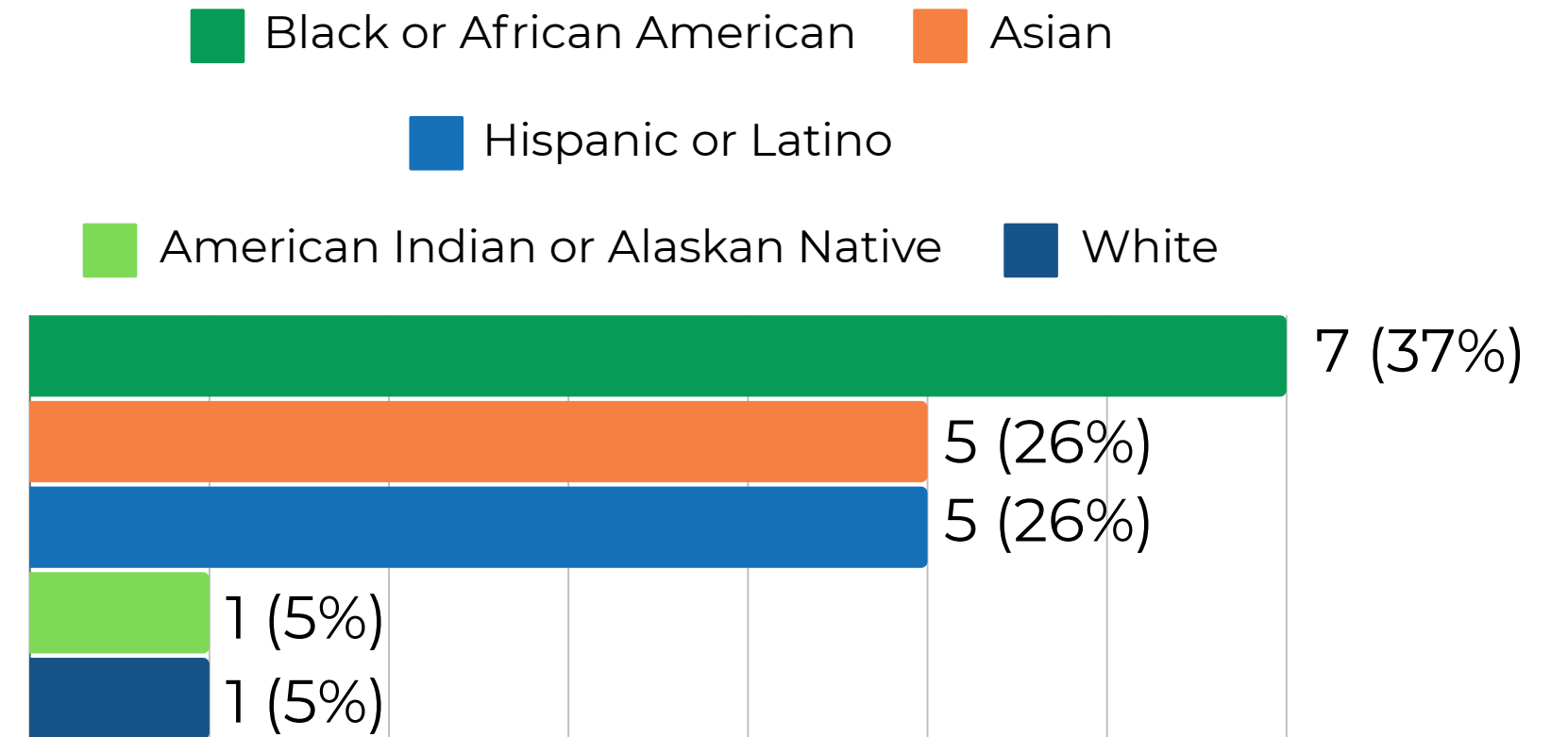
OAKLAND CHILDREN'S INITIATIVE

ENROLLMENT BY RACE/ETHNICITY IN PRIORITY PARTNER SITES

Enrollment by Race/Ethnicity OUSD - FY23-24



Enrollment by Race/Ethnicity COOHS - FY23-24



OAKLAND CHILDREN'S INITIATIVE

ENROLLMENT BY AGE IN PRIORITY PARTNER SITES



Enrollment by Age

Age	GRAND TOTAL	COOHS	OUSD
Age 5	20 (1%)	0	20
Age 4	1,410 (68%)	6	1,404
Age 3	567 (27%)	7	560
Age 2	62 (3%)	3	59
Age 1	3 (0%)	3	0



OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students



CITY OF OAKLAND
HEAD START

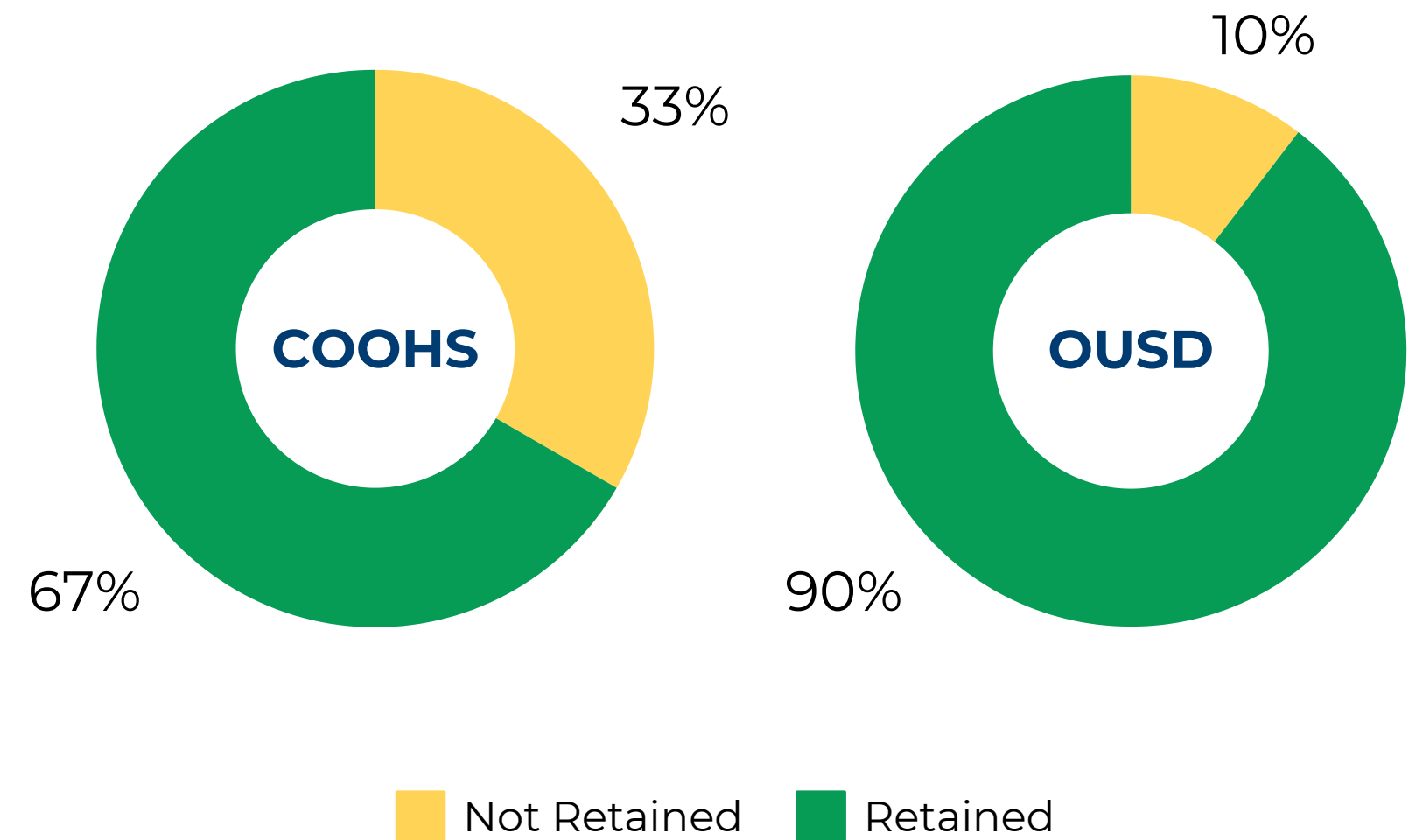


OAKLAND CHILDREN'S INITIATIVE

RETENTION RATE FOR ECE EDUCATORS



EDUCATOR RETENTION - FY23-24 (OAKLAND CHILDREN INITIATIVE SITES)



OAKLAND CHILDREN'S INITIATIVE

NUMBER AND PERCENTAGE OF CHILDREN ENROLLED IN AN IMPROVED ECE FACILITY
DUE TO OCI FUNDED CAPITAL INFRASTRUCTURE IMPROVEMENTS

374 (18%) children ages 0-5 enrolled in an improved early care and education facility funded by the Initiative's Early Education Fund

10% of OUSD sites received capital infrastructure investments

- Oakland Academy of Knowledge Preschool & Elementary
- Highland Child Development Center (CDC) & Community School
- Horace Mann Elementary
- Jefferson CDC
- Kaiser CDC & Early Childhood Center
- United Nation CDC



OAKLAND UNIFIED
SCHOOL DISTRICT
Community Schools, Thriving Students



CITY OF
OAKLAND
HEAD START



OAKLAND CHILDREN'S INITIATIVE

PERCENTAGE OF OCI SITES WITH A QUALITY RATING ABOVE STANDARD

100% sites funded by Early Education Fund with quality ratings above standard*

\$401K invested in infrastructure (6.4 FTE) in COOHS (e.g., Admins, Supervisors, Facility Coordinators, Project Manager, Data Analyst, Compliance Supervisor)

\$498K invested in infrastructure (7 FTE) in OUSD (e.g., Directors, Program Manager Kindergarten Readiness, Project Manager)

**A high quality early childhood program provides a safe and nurturing environment while promoting the physical, social, emotional, and intellectual development of young children.*



OAKLAND UNIFIED
SCHOOL DISTRICT
Community Schools, Thriving Students



CITY OF
OAKLAND
HEAD START





LOOKING AHEAD



OAKLAND UNIFIED
SCHOOL DISTRICT
Community Schools, Thriving Students

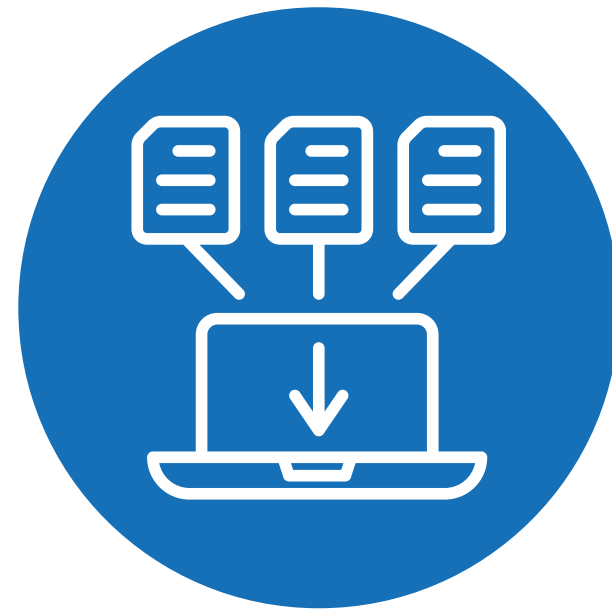


CITY OF
OAKLAND
HEAD START





Establish system wide data-sharing agreements



Continue to build more robust data collection, tracking, and systems



Continue to support infrastructure needs

FY25 Reporting Narrative

Implementation Partner (3–5-page limit)

High-Level Overview

Introduction

Instructions: Answer the following prompts using narrative. **What will be different in the upcoming year for IPs? What will be different for subcontractors / partners? What changes should be anticipated?** Sparingly, feel free to use graphics and/or charts to support the narrative.

Oakland is in a privileged position to have Oakland Children's Initiative (OCI) funding dedicated to young children and their families, and First 5 Alameda County (First 5) is honored to be serving as Implementation Partner for the early education fund to support the success of OCI, system building and coordination. Setting up the administrative infrastructure over the past year and a half – data sharing, multi-year contracts, timelines with multiple governing bodies – to administer the funding has taken intentionality and focus. We are administering with public agencies that are emerging from the COVID crisis, on top of years of underfunding, in a complex and fragmented early care and education system, with no planning time built into the legislation.

This year, First 5 continued to evolve the work with priority partners named in the OCI legislation, Oakland Unified School District (OUSD) and City of Oakland Head Start (COOHS), transitioning from building infrastructure to supporting ongoing implementation, monitoring of capacity and performance, and long-term systems visioning. Per the charter mandate, in 2023 First 5 negotiated "capacity" with the public systems partners, who agreed to define it as ability to spend. This agreement supports First 5's programmatic oversight and administrative responsibility to monitor funding towards the goals of the ordinance.

As a result of focusing on capacity and implementation:

- First 5 initiated conversations with COOHS, partnered with the Accountability Officer, and approached the City Administrator requesting direction from the City regarding the COOHS allocation, alignment on the proposed program model, and data reporting. On September 19, 2024, the City Administrator approved a \$6.6M budget allocation for COOHS for Fiscal Year (FY) 2024-25. First 5 requested that COOHS revise their FY 2024-25 program plan and budget following this direction.
- First 5 engaged OUSD and COOHS leadership in systems visioning and planning based on capacity and RBA data.
 - OUSD intends to focus more deeply on enrollment and uptake (closing the gap), and the quality of experiences for families.
 - COOHS is continuing to hire to achieve the goals in their program plan, refine data reporting, develop finance capacity and structure, and plan for new federal rules and anticipated reductions.

In addition to serving as the OCI Early Education Fund Implementation Partner (IP), First 5 is the named administrator of the Child Care, Preschool, and Early Education Program (CCPEE Program) in Measure C: Children's Health and Child Care Initiative for Alameda County. It is estimated Measure C will generate \$150 million annually for the CCPEE Program, and First 5 is actively planning how to best coordinate the two measures, along with existing funding, to maximize impact across the early childhood system and leverage existing funding streams and community engagement opportunities.

Reflecting on 2023-24¹

2023-24 OCI Implementation: Successes

Instructions: Answer the following prompts using narrative. **Reflecting on last year, what worked well and why?** Sparingly, feel free to use graphics and/or charts to support the narrative.

The success of the OCI Early Education Fund implementation—in a complex, historically under resourced, and fragmented system—has required an intentional public infrastructure approach that benefitted from the administrative backbone and nimbleness of First 5 working in partnership with the participating public agencies.

Capacity Building & Infrastructure

- *Capacity definition:* The legislation mandates the Early Education Implementation Partner (First 5), COOHS, and OUSD reach agreement on capacity before the Early Education Fund can be allocated to the mixed delivery system. In FY 2023-24, First 5 brokered an agreement with OUSD and COOHS, the two priority public agencies identified in the legislation, to define capacity, as the “capacity to spend in current years and future years.”
 - This definition provides a metric for First 5 to do our administrative and programmatic due diligence and understand the public agency partners’ ability to make investments that are aligned with the goals and requirements outlined in the legislation, including the prioritization of low-income 4- and 3-year-olds and the funding prioritization to expanding public programs.
 - In our role as Implementation Partner, we will continue to conduct analyses to ensure intended investments are made in alignment with the legislation and are responsive to the highest local need.
 - As mandated in the legislation, once OUSD and COOHS have “reached agreement with the Implementation Partner ensuring funding to reach capacity,”² any remaining funding may potentially support the broader child care system (e.g., family child care providers and centers). Measuring capacity to spend ensures resources are going to children and families and that investments are supporting service expansion and closing the enrollment gap in the broader early care and education system.
 - The attached memo entitled “Oakland Children’s Initiative Program & Budget Overview, FY 2024-2025 TO FY 2026-27” submitted to the Accountability Officer and Oakland Children’s Initiative Oversight Commission (Attachment A) on April 3, 2024, provides further documentation on the process and agreement for defining capacity.
- *Contracts:* In FY 2023-24, First 5 used our administrative flexibility to enter into negotiations for multi-year contracts with the two public system partners.³ The City of Oakland’s financial contract with First 5 is limited to a one-year allocation according to the City’s appropriation of available Initiative revenue. We opted to use the multi-year structure for our contracts with OUSD and COOHS to create a level of stability that affords system building and multi-year planning. This contractual architecture establishes the financial commitment for COOHS and OUSD for the remaining three years yet mitigates financial risk to First 5 and the City of Oakland through mandated annual renewals. This ensures the alignment of budgets with historic spending, availability of revenue, and programmatic plans. In addition to the multi-year contracts, the established fiscal policies and procedures resulted in zero audit findings in the first year (FY 2022-2023) of implementation.
- *Data sharing:* In FY 2022-23, First 5 developed initial operable data sharing agreements and actively worked with partners to find opportunities to streamline the reporting and administrative burden where possible. In FY 2023-24, First 5 continued to refine the data

¹ Represents the fiscal year spanning from July 1, 2023, to June 30, 2024.

² [Article XVI – The Children’s Initiative of 2018](#) – Section 1606(b)(2)

³ The COOHS Multi-Year contract is pending program plan and budget revisions per guidance from the City Administrator (as of September 20, 2024).

sharing agreements with OUSD and COOHS in an attempt to ensure we receive timely, accurate, and disaggregated data to track progress. As part of our role as Implementation Partner, First 5 actively and continuously works with our partners towards streamlining the collection, analysis, and reporting of data across the ECE system. A comprehensive data sharing agreement with COOHS is still in progress pending additional guidance from the City Administrator.

Systems Building

- *Convened systems leaders:* In the past year and a half, First 5 established and continues to hold regular Joint Public Systems Leader meetings with OUSD, COOHS, and the Accountability Officer to align on a shared vision and system coordination. In addition, First 5 regularly convenes collaborative working groups with data, finance, and program teams at OUSD and COOHS to support successful OCI implementation. These meetings have contributed to other successes, including the agreement on the definition of capacity, as they provide frequent touchpoints for leadership and staff to strategize and problem-solve. (See Attachment B process timeline)
- *Common K-readiness tool:* In FY 2023-24, First 5 led a process with Alameda County Superintendent Alysse Castro to reach agreement on a single countywide, policy-oriented tool to measure kindergarten readiness. The participatory process with school districts led to First 5 adopting the Early Development Instrument (EDI) to measure kindergarten readiness, which OUSD has used since 2017, enabling county-wide comparisons, and supporting cross-sector investments to improve conditions for young learners and their families at the neighborhood level. As a result, measuring kindergarten readiness, a key goal of the OCI legislation, will be uniform across Alameda County and provide partners in Oakland with valuable data to inform investments and measure impact.

Program Implementation

- *Service expansion and capacity building:*
 - OCI investments have supported funding 11 new classroom support staff and 38.5 positions preserved that otherwise would be eliminated. Both preserving and increasing the volume of direct services staff allows our partners to expand programs and access to early care and education, the highest priority goal of the legislation's Early Education Guidelines for the First Five-Years.
 - OCI funds were also used to expand professional development opportunities and supports in equity, curriculum, parent engagement, and nutrition, in support of the Early Education Guideline to ensure professional development is available for educators and the use of developmentally appropriate curriculum.
- *Family supports:*
 - Hired family navigators and staff to improve community engagement, family access to care, and provision of basic needs (three new family support staff; two positions preserved that otherwise would be eliminated, seven ongoing). Expanding community engagement programs is crucial to meeting the ordinance goals of increasing the number of children enrolled in free or affordable, high-quality early education.
- *Built environment:* Built quality, age-appropriate spaces for children and child-centered environments, major renovations at OUSD's Kaiser Early Childhood Center including a beautiful, safe, and developmentally appropriate new playground; other built environment investments include fences, painting, soil testing, lead paint testing, murals and surveying.

2023-24 OCI Implementation: Challenges

Instructions: Answer the following prompts using narrative. **What challenges did the IP and its subcontractors experience and why?** Sparingly, feel free to use graphics and/or charts to support the narrative.

First 5 acknowledges that planning and system coordination for OCI is a multi-year system building process that includes efforts to support quality, cost-effectiveness, and expanded access for children. Implementation challenges highlight opportunities for program enhancements and strengthening system coordination. First 5 is committed to working with partners to understand challenges and apply lessons learned to strategize around persistent barriers, improve upon current operations, and expand on achievements.

Systems Building: To address the challenges below, we elevated concerns and recommendations to the City Administrator and the Mayor, including recommendations related to data collection, financial partnership, and capacity building. We also continue to work with our partners to streamline administration, identify challenges and work collectively toward solutions. As mentioned above, we host regular Joint Public Systems Leader meetings, and ongoing Bi-Weekly Working Group meetings (one with each public partner) with program and administrative staff.

- *Public policy conditions:*
 - OCI implementation is operating in challenging public policy conditions, including the sunset of COVID support, public agency budget deficits, leadership changes (including a mayoral transition in FY 2022), and a teachers union strike, significant differences in systems' financial and cost structures, program and budget design, and limited administrative infrastructure following decades of underfunding of the priority partners. Additionally, the OCI legislation did not include planning time to stand up contracts, structures, and infrastructure needed for implementation of an initiative of this scale.
 - In 2021, COOHS had a \$5.5 million reduction in federal funding, which would have led to the closure of the Tassafaronga, Arroyo Viejo, and Franklin Center Head Start/Early Head Start sites. The Oakland City Council saved these sites from closure with a \$1.836 million allocation from the General-Purpose Fund (Resolution No. 8801 C.M.S.). These sites are now funded 100% with OCI monies. Since the inception of OCI, the sites appear to be under enrolled, serving 37 children in FY 2022-23 and 19 children in FY 2023-24.
- *Administrative authority:*
 - First 5 does not have administrative authority over the public systems partners; aligning each entity's budget and cost structures, data collection systems, procurement and governing body timelines to ensure successful OCI implementation requires deep partnership with the systems that have been solely under-resourced and need to build infrastructure. First 5 combines partnership with due diligence in ensuring compliance with the ordinance mandates, monitoring partners' ability to spend, and meeting performance targets, all in a highly politicized environment with public scrutiny on local tax dollars.
- *Financial Infrastructure:*
 - First 5 receives funding from the City of Oakland for OCI, and then re-distributes it based on the OCI mandates to the two public system partners, OUSD and COOHS. Since COOHS sits in a City Department, the funding comes *from* the City to First 5, then *back* to the City. The Accountability Officer releases payments to First 5 based on complete quarterly expense reports from First 5, COOHS, and OUSD. As a result, First 5 cannot issue payment to our partners until we receive and review all expense reports, General Ledgers, and requested back-up documentation. Each partner has their own contracting processes, governing bodies, and financial agreement policies (e.g. advances,

year-end close, true ups, invoices, etc.), increasing the complexity of navigating public systems. Navigating things like the OCI ramp up, unplanned expenses, and savings from planned hiring, all require complex administrative problem solving in systems that are already stretched thin.

- This has been especially acute with COOHS, who have faced challenges with financial reporting timelines as the City of Oakland Central Payroll Bureau posts payroll at least six weeks after the month closes. COOHS response time to the First 5 requests for a sample of back-up documentation has caused additional delays. This is particularly significant in Quarter 4 because Proposition 10 requires First 5 to present its Annual Audit to the First 5 Alameda Commission in October.
- To address the challenges, First 5 has recommended to the City Administrator and the Mayor that City Finance and HR staff work directly with First 5 Finance staff to be able to develop a financial architecture and agreements that meet each partner's need. First 5 has also recommended that the City invest in technical assistance and capacity building to support the administrative infrastructure of COOHS. The Accountability Officer has echoed this recommendation. First 5 will continue to work with the City Administrator and his designee(s), the Accountability Officer, and COOHS to resolve issues and create administrative efficiencies.

Program Implementation

- *Capacity and model:* The COOHS program model, budget, and restrictions on data reporting have been a concern in terms of the low number of children reported served, the cost per child, and the program's ability to spend. These concerns prompted First 5 to initiate conversations beginning in February 2024 with COOHS, again in April in partnership with the Accountability Officer, and as of July 2024, with the City Administrator. As a result of the First 5-initiated meetings with the City Administrator that included the Accountability Officer, the City Administrator took the COOHS budget and program plan under review. In September 2024, the City Administrator provided direction and approved the FY 2024-25 expenditure amount for COOHS at \$6.6M. First 5 has asked COOHS to revise FY 2024-25 budget and program plan following this guidance.
- *Administrative bandwidth and leadership transitions:*
 - In FY 2023-24 the public systems partners continued to ramp up capacity and structures to implement the Initiative, including the hiring of direct service and administrative staff. Both entities have had transitions at the highest leadership level, which required re-orientation to the complexities of OCI implementation. In the coming years, we will continue to assess bandwidth and invest in building capacity to administer and expand direct services.
 - The OUSD Board of Education imposed temporary hiring freezes in January 2022, March 2023, and February 2024, which impacted OUSD's ability to staff up their administrative infrastructure. If a position was not exempt from the hiring freeze, staff were required to submit a request for exemption to create new positions or fill existing positions, adding an additional layer of complexity to navigating public systems. There was also some underspending in facility funds for improvements to address ADA accessibility and enhancements likely due to District policy and processes for facility related work.

Data Infrastructure

Receiving robust data from our partners is essential to informing OCI investments, measuring success, and meeting the legislation's goals. Data collection and tracking in the ECE system is fragmented and inconsistent across systems, creating challenges for uniform monitoring and evaluation.

- *Data collection and tracking.* Certain performance measures identified could not be fully reported in the implementation ramp up due to the lack of uniform data tracking and collection procedures. Example performance measures include:
 - Detailed information on all OCI funded capital infrastructure improvements by type.
 - Professional development hours earned and satisfaction with training received.
 - Staff retention rates.
 - Results from federally funded COOHS sites.
- *Data reporting.* Due to privacy regulations, as reported by COOHS, in place for some federally funded programs, legal counsel and staff are still working through whether de-identified individual level data of federally funded sites can be shared with First 5 for OCI reporting and evaluation purposes.

To address these challenges, First 5 continues to refine data sharing agreements and identify the infrastructure needs for a robust data collection and tracking system. We will continue to work with COOHS and the City Administrator's office on a data sharing agreement with COOHS that accurately represents the impact of OCI investments.

Major Learnings: Continue, Start, and Stop

Instructions: Answer the following prompts using narrative. **What were major learnings from the prior year that informed changes in this year's program plan and budget? What will continue, start, and/or stop?** Sparingly, feel free to use graphics and/or charts to support the narrative.

First 5 will continue to work with public systems partners, COOHS and OUSD, to ensure the most successful implementation of OCI.

In the attached memo (Attachment A), First 5 provided detailed documentation of learnings. We outlined strengths to build on and considerations for both partners, OUSD and COOHS. Learning and future considerations for First 5 as the system building intermediary from the same memo are outlined below:

Continuous Fiscal Monitoring

- Continue to analyze: Progress towards the ordinance mandates, expanding access to early education and/or preschool programs, by continuing to consider trade-offs between investments in the built environment, administrative investments, direct service, and availability of early care and education programming for more children. Monitor expenses, use annual data and evaluation to assess cost comparisons and best use of funds analyzing the intersectionality of value and impact and continuous improvement.
- Mixed delivery system: Prioritize continuing to closely monitor the spending of our priority systems partners, OUSD and COOHS, and assess feasibility of allocating funding to the mixed delivery system to maximize the timely use of local resources to benefit and serve more families.
- Timely use of funds: Continue to monitor expenditures to assess availability of funds for mixed delivery and/or capital investment.
- Monitor impact of public system budget deficits: Continue to track budget and potential declining general fund commitment and resulting needed increases in OCI to maintain current capacity in the existing early care and education system.

Coordinated Investments

- Capital investments: Start more work to optimize impact of infrastructure investments (e.g., building renovations, age-appropriate outdoor spaces) by coordinating projects across systems and by geography; Continue to address child care deserts and improve access to family-friendly spaces across geographic distributions; identify, coordinate, and facilitate opportunities across systems, including OUSD, City of Oakland, County of Alameda, private partners, and faith-based partners.
- Shared business services: Start to explore opportunities to leverage funding streams and reduce overall expenses by identifying possible shared purchasing of goods and services, e.g. classroom materials or professional training.
- Technology: Continue to identify cross-system interoperability opportunities to support eligibility, enrollment, and collection of data in the build out of a more coordinated system, including the integration with the centralized eligibility and enrollment system mandated by Measure C.
- Stabilize infrastructure: Continue to streamline processes (i.e. program and budget design, procurement, reporting etc.) and stabilize staffing through hiring and retention strategies.
- Administrative streamlining: Continue to explore coordination of investments across sites and systems, reducing inefficiency and siloing of programs.

Assessing for Impact

- Evaluation: Start to explore evaluation coordination between OCI and Measure C and utilize findings to inform investment.
- Data sharing: Start to establish multi-sector data MOUs to support the measurement of impact.
- Data collection: Continue to enhance data collection via feedback from teachers and families

about the impact of OCI and experiences with the current programming and ensure use and leveraging of existing data to inform and prioritize investments (e.g., kindergarten readiness study EDI instrument, COOHS parent survey); ensure collected data provides transparency to support continuous quality improvement and allows for equity analysis of beneficiaries demographically and geographically.

Family Partnerships

- *Basic needs and family support:* Continue to enhance and explore coordination of basic needs and wraparound supports for families, including food access, transportation, family navigation to services, and expanded supports for families and children transitioning to kindergarten.
- *Family leadership and engagement:* Continue and start to enhance applying learning and explore opportunities for family leadership and engagement across the broader ECE system.
- *Leverage outreach and public education:* Continue and start to enhance increasing awareness about the Initiative to support parent, caregivers, and provider access to OCI funded activities/services.
- *Oakland's asset of diversity:* Continue and start to enhance expansion of bilingual learner supports and multilingual education; support refugee, newcomer, and immigrant families through community engagement; and build curriculum and programming that recognizes and centers the adaptive assets of multiculturalism, e.g. raising global citizens.

Programming

- *Build programs responsive to parent need:* Start to explore options to expand services such as before and after care; continue to explore leveraging the mixed delivery system providers to meet demand for non-traditional hours.
- *Mixed delivery strategy:* Start to explore leveraging existing partnership with mixed delivery system, centers, FCC, and FFN providers to potentially coordinate and expand services pending available funding.
- *Expansion to younger ages:* Based on the OCI ordinance, start to consider the threshold to expand developmentally appropriate services for younger ages once the priorities for 4 and 3 years olds have been addressed.

Educator Enhancements

- *Workforce pathways:* Continue to leverage current investments, specifically the Early Education Apprenticeship Program, CalWORKs Pilot, to address ECE workforce crisis.
- *Professional development:* Start to explore standards and coordination of training and curriculum across service modalities, e.g. equity, parent partnership, and child development.
- *Learning modalities:* Continue to incorporate early identification and screening such as offered through First 5's Help Me Grow Program as well as supports for neurodivergent children.

Looking forward to 2024-25⁴

Major Themes: 2024-25 Program Plan and Budget

Instructions: Answer the following prompts using narrative. **As we look to 2024-25, what are your aims and goals as the Implementation Partner (IP)? How are you adjusting activities to meet the 5-year guidelines? How have the RBA measures informed these changes?** Sparingly, feel free to use graphics and/or charts to support the narrative.

FY 2024-25 Goals and Recommended Adjustments Based on Ability to Spend and RBA Reporting

First 5 is working with public systems partners OUSD and COOHS to engage in system visioning and planning related to goals, and to address the “strengths and considerations” outlined in Attachment A. Consistent with the vision and goals of the legislation, our intention is to increase overall attainment and reduce socio-economic disparities by increasing available and affordable quality early care and education for all of Oakland’s children, prioritizing expansion to populations outlined in the legislation. Currently there are an estimated 29,696 children aged 0-5 in Oakland.⁵ It is estimated that 90% of infants and toddlers in Oakland, over 8,000 young children, are eligible for subsidized care and not enrolled. For preschoolers, it is estimated that just over 50%, more than 3,100 Oakland preschool aged children, are eligible for subsidized care yet not enrolled.⁶

Systems Planning

First 5 is using RBA measures, expenditure data, and system visioning discussions to inform adjustments to investments and activities to meet the Five-Year Guidelines. Looking forward, First 5 will continue working with the public systems partners to build detailed Fiscal Year 2025-26 program plans and budgets based on those priorities and monitor performance and spending to those goals, building off systems planning work in the summer of 2024:

- June 6th, First 5 held a Public Systems Leadership meeting with OUSD and the Accountability Officer (COOHS had requested a reprieve from meetings during a busy time) to review RBA data to inform planning.
- July 26th First 5 hosted a Joint Public Systems Leadership meeting with both OUSD, COOHS, and the Accountability Officer and her staff to define a shared vision, identify what systems partnership looks like, complete a RBA “Turn the Curve” activity on uptake and enrollment data, and use the “strengths and considerations” from the Attachment A to make concrete plans that will inform the program and budget design.
- August 29th the Joint Public Systems Leadership group reconvened, and the OUSD and COOHS leadership teams presented their more detailed plans for meeting their priorities in the coming year, identified opportunities for cross-system collaboration, and administrative supports needed.
- In Oct/Nov 2024, these meetings will include discussions on revisiting RBA measures, collaboration and communications strategies, and ensuring program plans and budgets align with shared visions and values (please see Attachment B timeline).

Please note: COOHS is revising their FY 2024-25 program plan following the City Administrator’s direction on the final expenditure amount of \$6.6M.

⁴ Represents the fiscal year spanning from July 1, 2024, to June 30, 2025.

⁵ U.S. Census Bureau. 2022 American Community Survey 5-Year Estimates. Retrieved from <https://data.census.gov/>.

⁶ 2022 Oakland City Profile. First 5 Alameda County.

<https://first5alameda.org/files/2022%20City%20of%20Oakland%20Profile%20Early%20Care%20and%20Education%20Data.pdf>

Closing

Instructions: Answer the following prompts using narrative to **identify 3-5 high-level takeaways from the 2024-25 program plan and budget that communicate important investments for the coming year**. Sparingly, feel free to use graphics and/or charts to support the narrative.

FY 2022-2023 – FY 2024-25 OUSD and COOHS Spending (in thousands)⁷

	FY 22-23				FY 23-24				FY 24-25			
	Budget	Budget FTE	Act.	Child Enrolled ⁸	Budget	Budget FTE	Act.	Child Enrolled ⁹	Budget	Budget FTE	Act.	Projected Children Enrolled
OUSD	\$ 6M	6	\$ 441k	1,906	\$ 11.9M	34	\$ 8.1M ¹⁰	2,043	\$ 14.5M	49	N/A	2,059
COOHS	\$ 2.6M	33	\$ 2.3M	37	\$ 6.6M	43	\$ 2.7M ¹¹	19	\$ 6.6M ¹²	65	N/A	135

The above table illustrates the trends in spending and children served by the two public systems partners, COOHS and OUSD, the proposed budget and the anticipated number of children served for FY24-25. First 5 will follow the guidance of the City Administrator related to the FY 2024-25 COOHS contract and continue to partner to support the success of OCI.

First 5 will also continue to engage OUSD and COOHS with the City in systems visioning and coordination - planning for the coming years to meet the Five-Year Guideline goals and building off the “strengths and considerations” for each public system partner. Together we will create strategies that translate into concrete program design, budgets, and administrative practices that accomplish:

- *Program improvements* - close the enrollment gap and improve experiences for families
- *Systems coordination and fiscal leveraging* - coordinate each other’s systems, and leverage additional state, local, and federal dollars to maximize investments in early care and education

First 5 remains committed to:

1. Transparent funding
2. Financial stewardship that supports stability in the field and maximizes the flow of funding
3. Engagement with partners, community, and program beneficiaries to ensure investments are grounded in local context and community and system priorities
4. Centering equity across the Early Education Fund to foster an equitable early childhood system
5. Measuring impact and using data to guide investments and policy and programmatic decisions.

Attachments:

- Attachment A: Multi-Year Program Plan memo
- Attachment B: FY 2024-25 Planning Timeline Arc

⁷ Budget numbers rounded up to the nearest thousandth.

⁸ Based on point in time reporting from priority partners as of January 2023

⁹ Based on point in time reporting from priority partners as of January 2024

¹⁰ OUSD includes Accruals through Q4

¹¹ Based on revised Q4 expense report as of August 30, 2024

¹² Allocation approved by the Oakland City Administrator on September 19, 2024

OCI Annual Timeline & Arc

FY 2024-25 Reporting Timelines and FY 2025-26 Program Plan & Budget Timelines

Planning Cycle	Annual Calendar <i>(dates subject to change)</i>
<p>FY 2025-26 Program Plan & Budget Visioning</p> <p><i>Parameters, Priorities, Guidance</i></p>	<p>July</p> <ul style="list-style-type: none"> • July 26: First 5-Hosted Joint Systems Leaders Visioning Retreat • July 27: CIOC presentation on FY 22/23 Data • July 24: OUSD and OHS FY 23-24 Q4 invoices, expense reports, and data due to First 5 • OUSD & OHS Bi-Weekly Working Group Meetings <ul style="list-style-type: none"> ○ Data reporting, contract updates, compliance <p>August</p> <ul style="list-style-type: none"> • August 8: Accountability Officer-Hosted Implementation Partners Retreat • August 29: First 5-Hosted Joint Systems Leadership Visioning Retreat (Part 2) • OUSD & OHS Bi-Weekly Working Group Meetings <ul style="list-style-type: none"> ○ Data reporting, contract updates, compliance
<p>FY 2025-26 Develop Program Plan & Budget</p> <p><i>Program Design, Staffing</i></p>	<p>September</p> <ul style="list-style-type: none"> • September 26: CIOC meeting • First 5 submits FY 2023-24 RBA Annual Report to Accountability Officer • First 5 submits FY 2023-24 End of Year Report Memo to Accountability Officer • OUSD & OHS Working Group Meetings <ul style="list-style-type: none"> ○ Program design informed by August Visioning Retreat <p>October/November</p> <ul style="list-style-type: none"> • October 3: Proposition 10-mandated Annual Audit due to First 5 Alameda County Commission • October/November: Joint Systems Leadership Meeting <i>(scheduling in progress)</i> • OUSD & OHS Working Group Meetings <ul style="list-style-type: none"> ○ Program design and budget development • OUSD and OHS FY 24-25 Q1 invoices, expense reports, and data due; Annual Classroom Report Due to First 5 <p>December</p> <ul style="list-style-type: none"> • Joint Systems Leadership Meeting • OUSD & OHS Working Group Meetings <ul style="list-style-type: none"> ○ Finalize Program & Budget Plan
<p>Update Contracts (FY 2025-26 Amendments)</p>	<p>January/February</p> <ul style="list-style-type: none"> • Mid-Year Budget Check-In • OUSD & OHS Working Group Meetings

<p><i>Legal Review, Scopes of Work, Submit for Approval</i></p>	<ul style="list-style-type: none"> ○ Contract amendment development ● Joint Systems Leadership Meeting ● OUSD and OHS FY 24-25 Q2 invoices, expense reports, data due to First 5 <p>March</p> <ul style="list-style-type: none"> ● OUSD & OHS Working Group Meetings ● First 5 submits FY 2025-26 Annual Program & Budget Plan to Accountability Officer <p>April</p> <ul style="list-style-type: none"> ● Joint Systems Leadership Meeting ● OUSD & OHS Working Group Meetings ● OUSD and OHS FY 24-25 Q3 invoices, expense reports, data due to First 5
<p>Adopt Contract Updates (FY 2025-26 Amendments)</p> <p><i>Approval from Governing Bodies</i></p>	<p>May</p> <ul style="list-style-type: none"> ● OUSD & OHS Working Group Meetings ● OHS Parent Advisory Board Approves FY 2025-26 OHS Contract Amendments ● Oakland City Council – Life Enrichment Committee approves FY 2025-26 OHS Contract Amendments <p>June</p> <ul style="list-style-type: none"> ● Joint Systems Leadership Meeting ● OUSD & OHS Working Group Meetings ● OUSD Board of Education Approves FY 2025-26 Contract Amendments ● Oakland City Council Approves FY 2025-26 COOHS Contract Amendments ● First 5 Commission Approves FY 2025-26 Contract Amendments ● Oakland City Council Approves First 5 FY 2025-26 Contract Amendments ● Accountability Officer publishes Evaluation (bi-annual)