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|-----------------|---|
| <b>TO:</b>      | Jennifer Cabán, Accountability Officer, Oakland Children's Initiative<br>Oakland Children's Initiative Oversight Commission   |
| <b>FROM:</b>    | Kristin Spanos, Chief Executive Officer, First 5 Alameda County   |
| <b>CC:</b>      | Dr. Kyla Trammell-Johnson, OUSD Superintendent<br>Dr. Sondra Aguilera, OUSD Chief Academic Officer<br>Jestin Johnson, Oakland City Administrator<br>First 5 Alameda County Commission |
| <b>SUBJECT:</b> | Oakland Children's Initiative Early Education Fund: Program Plan & Budget Annual<br>Recommendations, Fiscal Year (FY) 2025-2026   |
| <b>DATE:</b>    | May 16, 2025  |

## EXECUTIVE SUMMARY

In 2022, the City of Oakland selected First 5 Alameda County (First 5) to administer the Oakland Children's Initiative (OCI) Early Education Fund to invest in the local early education system in service to students, families, and educators. By the end of FY 2025-26, an estimated \$89.5M<sup>1</sup> will have been invested and a 60% increase in the number of 3- and 4-year-olds from low-income families served, as prioritized in the ordinance, since the initiative began—from 1,368 in FY 2022-23 to 2,192 in FY 2025-26.

This report provides an overview of the fund's implementation to date (from January 2023 through May 2025), highlighting key investments, impact, and recommendations for FY 2025-26 program and budget planning in accordance with the shared vision and values for Oakland's Early Care and Education (ECE) System. (See also [Appendix A: Shared Vision and Values for Oakland's ECE System](#).)

## KEY RECOMMENDATIONS FOR FY 2025-26

**First 5 recommends the following overarching priority system building efforts take place in FY 2025-26 to maximize OCI's impact:**

- **Convene a leadership table to finalize a vision and systems alignment process**, including the City of Oakland and Oakland Unified School District and facilitated by School Readiness Consulting, to determine the priorities and next steps for OCI, including opportunities for further integration with Oakland Promise. Please see [Appendix H3: School Readiness Consulting Scope of Work](#).
- **Continue to advance fiscal policy levers to maximize the benefits of OCI** by leveraging and coordinating local (Alameda County Measure C), state (Universal Preschool/Transitional Kindergarten, child care rate reform), and other funding sources to support the early childhood ecosystem.

- **Strengthen the administrative infrastructure of the public systems partners**, including staffing, data systems, and fiscal management, with the goal of more fully integrating data to inform investments that create the conditions in systems and communities for kindergarten readiness for every child. Please see [Appendix H6: Introducing a Universal County-wide Tool to Assess Kindergarten Readiness](#).

**First 5 recommends a \$44.7 million allocation from the OCI Early Education Fund to the City of Oakland’s public early care and education programs in FY 2025-26. These programs are projected to serve 2,582 3- and 4-year-olds living in Oakland in FY 2025-26. Proposed strategic leadership collaboration and investments include:**

- **\$32.9 million to the Oakland Unified School District (OUSD) to:**
  - Increase mental health and inclusion services for children and families to provide services to an additional 20 PK and TK classrooms, serving up to 1,200 children
  - Build a new early education site (Washington Child Development Center) on the Sankofa Elementary School Campus, located in West Oakland’s Bushrod neighborhood, which when completed will serve up to 144 more children
- **Estimated overall impact of OUSD investments:**
  - Expand early childhood education and care by increasing enrollment for 3- and 4-year-old children by an estimated 31%—from 1,822 in FY 2022-23 to 2,388 in FY 2025-26

| <b>3- AND 4-YEAR OLD ENROLLMENT IN OUSD FY 2022-23 TO FY 2025-26</b> |   |   |  |   |  |   |
|--|---|---|--|---|--|---|
| <b>FY 22-23<br/>Actual<br/>Enrollment</b>                            | <b>FY 23-24<br/>Actual<br/>Enrollment</b> | <b>Percent<br/>Change from<br/>FY 22-23</b> | <b>FY 24-25<br/>Projected<br/>Enrollment</b> | <b>Percent<br/>Change from<br/>FY 23-24</b> | <b>FY 25-26<br/>Projected<br/>Enrollment</b> | <b>Percent<br/>Change from<br/>FY 24-25</b> |
| 1,822  | 1,964                                     | 8%  | 2,212  | 13%   | 2,388  | 8%  |

- **\$7.3 million to City of Oakland Head Start (COOHS) to:**
  - Maintain services at the three COOHS sites that are fully funded by OCI, with expected enrollment of 48
  - Open a new COOHS site (Bethlehem Elementary Lutheran Church) in West Oakland, which will serve up to 24 more children
  - Support COOHS overall administration and expand their programmatic, administrative and analytic capacity
- **Estimated overall impact of COOHS investments:**
  - Expand children served from 13 to 48 3- and 4-year-olds at the three continuing sites, and a projected enrollment of 194 3- and 4-year-old children across COOHS’s service system

*Please note, First 5 is engaged in collaborative increased oversight and monitoring of COOHS’s enrollment and performance throughout the remainder of the FY 2023-27 OCI contract term. See also [Appendix H1: First 5 Memo to the City of Oakland re: Oakland Children’s Initiative Program & Budget, City of Oakland Head Start FY 2024-25](#).*

### 3- AND 4-YEAR OLD ENROLLMENT IN COOHS FY 2022-23 TO FY 2025-26

| FY 22-23<br>Actual<br>Enrollment | FY 23-24<br>Actual<br>Enrollment | Percent<br>Change from<br>FY 22-23 | FY 24-25<br>Projected<br>Enrollment | Percent<br>Change from<br>FY 23-24 | FY 25-26<br>Projected<br>Enrollment | Percent<br>Change from<br>FY 24-25 |
|----------------------------------|----------------------------------|------------------------------------|-------------------------------------|------------------------------------|-------------------------------------|------------------------------------|
| 25                               | 13                               | -48%                               | 128                                 | 885%                               | 194                                 | 52%                                |

- **\$4.5 million to First 5 Alameda County to:**

- Convene and facilitate public system leaders to ensure continued alignment of vision and agreement on strategic investments, including those needed to strengthen the administration and infrastructure of all public system partners
- Convene and facilitate cross-system partners to support implementation of leadership vision, develop budgets, evolve financial reporting and agreements, and monitor performance of system partners
- Collect and analyze budgetary, programming, and outcomes data and reporting from system partners to inform investment, accountability, and strategic communications
- Facilitate public outreach and community engagement to ensure investments are responsive to public need
- Partner with OCI Accountability Officer and Oakland Promise to further integrate OCI's initiatives and further develop strategic communications
- Support and facilitate the OCI annual independent audit and program evaluation

- ***Estimated overall impact of First 5 investments:***

- First 5 provides the necessary administrative backbone through leadership convening, participatory facilitation, planning, program design, budgetary accountability, financial and data analysis, leveraging for existing resources, and strategic storytelling. This role as the backbone agency facilitates the public systems partners programmatic outcomes on behalf of the taxpayers of Oakland, including:
  - Evolve the continued system building of OCI, increasing the number of 3- and 4-year-old children in low-income families enrolled in OUSD and COOHS by 60%— from 1,368 in FY 2022-23 to 2,192 in 2025-26 (see expected key outcomes, below)
  - Enhance the quality of classroom experiences, inclusion, and wraparound child and family supports to respond to community priorities and attract families, contributing to the increase in enrollment

**TABLE 1: OCI BUDGET FY 2022-2023 – FY 2026-2027**

|   | <b>FY 22-23<br/>Actual</b> | <b>FY 23-24<br/>Actuals</b> | <b>FY 24-25<br/>Budget</b> | <b>FY25-26<br/>Budget<sup>2</sup></b> | <b>FY 26-27<br/>Planning Budget<sup>3</sup></b> |
|---|----------------------------|-----------------------------|----------------------------|---------------------------------------|---|
| Early Education Fund Revenue <sup>4</sup> | \$23,181,428               | \$24,513,168                | \$27,947,925               | \$29,345,321                          | \$30,812,587                                    |
| Carryover & Unallocated Funds             | -                          | \$19,514,671                | \$29,846,056               | \$32,883,893                          | \$17,502,628                                    |
| <b>TOTAL Revenue</b>                      | <b>\$23,181,428</b>        | <b>\$44,027,839</b>         | <b>\$57,793,981</b>        | <b>\$62,229,214</b>                   | <b>\$48,315,215</b>                             |
| OUSD                                      | \$441,470                  | \$8,095,644                 | \$14,497,296               | \$32,952,454                          | \$15,766,770                                    |
| COOHS                                     | \$2,340,084                | \$2,447,355                 | \$6,600,000                | \$7,261,577                           | \$7,050,463                                     |
| First 5                                   | \$885,203                  | \$3,638,784                 | \$3,812,792                | \$4,512,555                           | \$3,955,035                                     |
| <b>TOTAL Budget</b>                       | <b>\$3,666,757</b>         | <b>\$14,181,783</b>         | <b>\$24,910,088</b>        | <b>\$44,726,586</b>                   | <b>\$26,772,268</b>                             |
| <b>Available Fund Balance</b>             | <b>\$19,514,671</b>        | <b>\$29,846,056</b>         | <b>\$32,883,893</b>        | <b>\$17,502,628</b>                   | <b>\$21,542,947<sup>5</sup></b>                 |

## BACKGROUND & CONTEXT

The Oakland Children's Initiative is a charter amendment approved by City of Oakland voters in 2018 to fund early childhood education and college readiness programs. The initiative aims to improve early education outcomes and reduce the severe disparities in educational access and quality experienced by families with low incomes across Oakland. OCI chronologically prioritizes children beginning at age 4 from families with low incomes. (See also [Appendix B: OCI Ordinance Mandates and Goals](#).) The City of Oakland's investment in early childhood education is an investment in the future of our society. Research consistently demonstrates the importance of high-quality early learning experiences in promoting school readiness and fostering life-long positive outcomes for children and their families, including economic prosperity.<sup>6</sup>

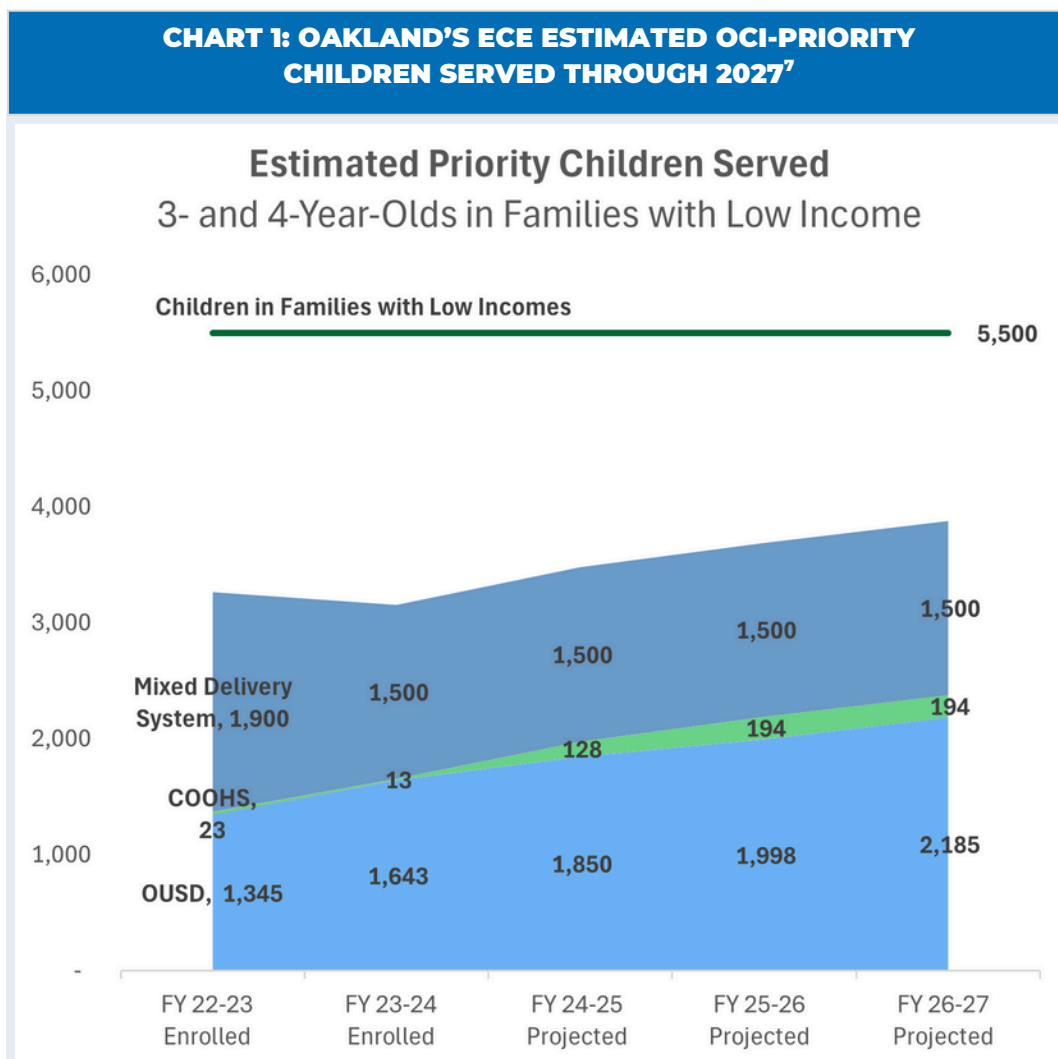
Now, more than ever, Oakland's early care and education system is undergoing a convergence of systemic and tumultuous change. The current threat of eliminating federal Head Start funding, new statewide and local reforms, and the persistent challenges of a historically underfunded, fragmented, and difficult-to-navigate system defines the current landscape. At the same time, our key partners at OUSD and COOHS are facing major challenges, including structural budget deficits and the recent departure of key leaders—at a time when continuity and commitment are most needed. Administering the fund in this environment is challenging and delicate, as First 5 has no administrative authority over its partners. OCI's success requires a shared commitment and strategic alignment from all public agencies serving Oakland children and youth to invest in early care and education as a public good. (See also [Appendix D: Early Childhood System Policy Landscape](#).)

## IMPACT TO-DATE

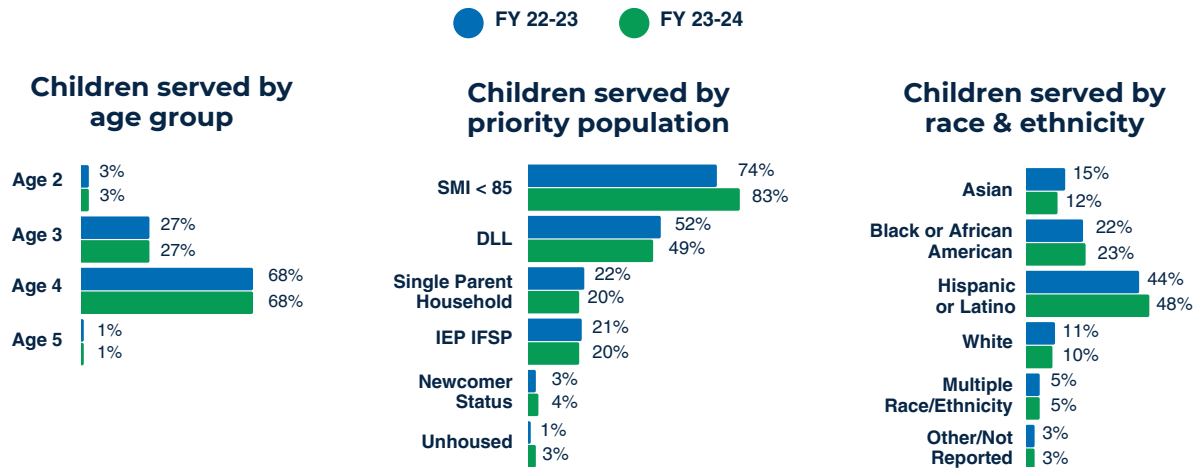
Since its implementation in January 2023, OCI has invested \$34.4M and increased access to and strengthened Oakland’s early care and education system through strategic public investments, collaborative partnerships, and innovation. OCI prioritizes investment in public systems and these improvements help ensure that the expanding free public early care and education options are ones that families trust, where teachers are supported, and children thrive – all contributing to increasing enrollment and advancing the goals of the ordinance. First 5 is tracking enrollment, curriculum, staffing patterns, and population need, and is analyzing who benefits within the context of demographic and socioeconomic proportionality of OUSD and COOHS students.

Since January 2023, the OCI Early Education Fund has accomplished the following outcomes to date:

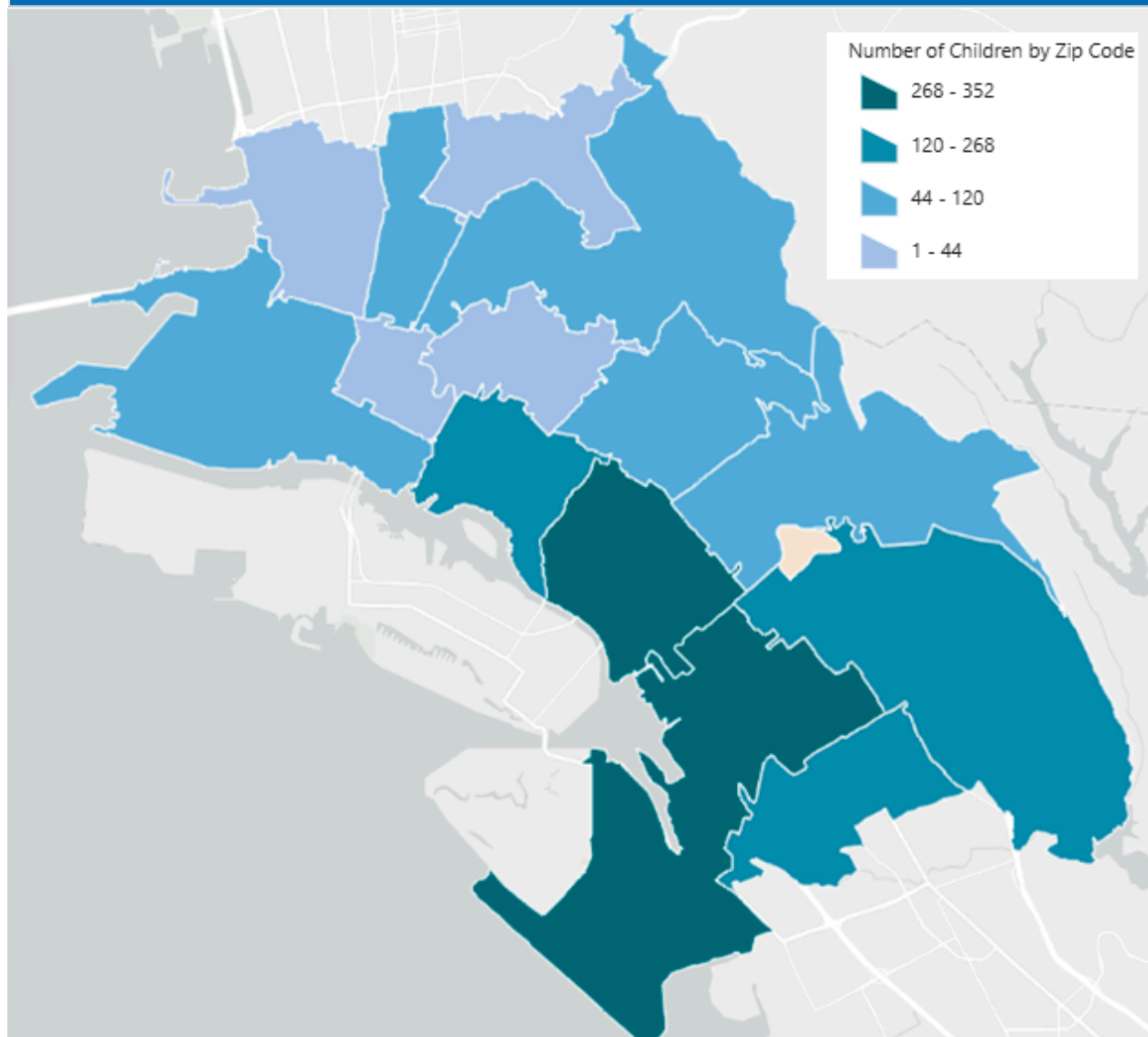
- Served 1,943 children in 2022-23 and 2,062 children in 2023-24, 95% of whom were 3- and 4-year-olds.
- Funded capital infrastructure improvements at six early care and education sites at OUSD that allowed for the above expansion to serve up to 66 additional children.
- Supported significant professional development opportunities to early educators in 2023-24, focusing on adopting the “Creative Curriculum” to support understanding and implementation of a project-based curriculum approach that aims at meeting children’s individual needs.



## CHART 2: DEMOGRAPHICS OF CHILDREN SERVED BY OCI INVESTMENTS<sup>8</sup>



## MAP 1: OCI ENROLLMENT BY HOME ZIP CODE, AGES 5 & UNDER



## LOCAL SYSTEM BUILDING WITH COMMUNITY INPUT

In Winter/Spring 2025, First 5 contracted with WestEd to conduct four Community Listening Sessions related to OCI, and six more that were specific to Alameda County's Measure C. Based on these sessions, WestEd produced a series of reports informing next steps (see [Appendix H2: Community Listening Sessions Key Themes and Recommendations](#)). The community-identified priorities informed our analysis of programmatic strengths and future considerations for the public systems partners (see [Appendix G: Local System Building With Community Input](#)). The input will also be used as we develop First 5's recommendations for updating OCI 5-Year Guidelines, as well as the Measure C Five-Year Plan.

- **PRIORITY POPULATIONS:** Increase navigators and prioritize marginalized groups
- **OUTREACH:** Expand culturally and linguistically responsive strategies to engage and partner with families and caregivers
- **CLASSROOM EXPERIENCES:** Lower educator-child ratios and improve curriculum to optimize learning and support inclusion and belonging
- **HOURS OF OPERATION AND LOCATION:** Expand extended-hour and overnight care options
- **INCLUSION SUPPORTS:** Invest in inclusive classrooms and staff training and services in recognition of different learning styles and educators, as well as family needs
- **FAMILY SUPPORTS AND BASIC NEEDS:** Centralize wraparound family support and navigation in recognition of the intrinsic connection between learning, socioeconomics, and social emotional realities
- **PROFESSIONAL DEVELOPMENT FOR EDUCATORS:** Enhance access to equitable PD and career pipelines
- **FACILITIES:** Invest in facilities and infrastructure improvements

## TAKEAWAYS & FUTURE CONSIDERATIONS

Despite the challenging and dynamic political, policy, and budgetary landscape, OCI's Early Education Fund has contributed to an increased number of children in Oakland having access to preschool. Planning and system coordination for OCI requires an ongoing process that includes efforts to support enriched classroom experience, cost-effectiveness, and expanded access for children across multiple areas. Through collaboration, as well as the recommended additional resources, OCI implementation continues to provide the opportunity to understand local challenges, improve upon current operations, strategize around persistent barriers, and expand on achievements. In FY 2025-26, kindergarten teachers will begin to administer the Early Development Instrument (EDI) (see also: [Appendix H6: Introducing a Universal County-wide Tool to Assess Kindergarten Readiness](#)). The adoption of this tool will provide an opportunity to further evolve the OCI program design and assess its impact. **In continuing to administer the OCI Early Education Fund, First 5 remains committed to:**

- Transparent and accountable funding
- Financial stewardship that supports stability in the field, maximizes flow of OCI funding, and coordinates with other funding sources like Measure C
- Engagement with partners, community, and program beneficiaries to ensure investments are grounded in local context and priorities
- Centering equity across the OCI portfolio to foster an equitable early childhood system
- Measuring impact and using data to guide investments



**MAY 2025**

**OAKLAND CHILDREN'S INITIATIVE  
(OCI) EARLY EDUCATION PROGRAM:  
PLAN & BUDGET ANNUAL  
ANALYSIS & RECOMMENDATIONS  
FISCAL YEAR 2025-2026**





## TABLE OF CONTENTS

|   |           |
|---|-----------|
| ► <b>EXECUTIVE SUMMARY</b>  | <b>1</b>  |
| • KEY RECOMMENDATIONS FOR FY 2025-26  | 1         |
| • BACKGROUND & CONTEXT  | 4         |
| • IMPACT TO-DATE  | 5         |
| • LOCAL SYSTEM BUILDING WITH COMMUNITY INPUT  | 7         |
| • TAKEAWAYS & FUTURE CONSIDERATIONS   | 7         |
| <br>  |           |
| ► <b>SECTION 1: OAKLAND UNIFIED SCHOOL DISTRICT<br/>PROGRAM &amp; BUDGET ANALYSIS</b> | <b>11</b> |
| A. OVERVIEW OF OUSD ECE PROGRAM VISION & PRIORITIES                                   | 11        |
| B. OUSD PROJECTED PRIORITY CHILDREN SERVED  | 11        |
| C. OCI IMPACT TO-DATE AT OUSD   | 12        |
| D. OUSD MULTI-YEAR BUDGET SUMMARY   | 13        |
| E. OUSD FY 2025-26 PROGRAM NARRATIVE  | 14        |
| F. OUSD TAKEAWAYS & FUTURE CONSIDERATIONS   | 18        |
| <br>  |           |
| ► <b>SECTION 2: CITY OF OAKLAND HEAD START<br/>PROGRAM &amp; BUDGET ANALYSIS</b>      | <b>20</b> |
| A. OVERVIEW OF COOHS ECE PROGRAM VISION & PRIORITIES                                  | 20        |
| B. COOHS PROJECTED PRIORITY CHILDREN SERVED   | 20        |
| C. OCI IMPACT TO-DATE AT COOHS  | 21        |
| D. COOHS MULTI-YEAR BUDGET SUMMARY  | 22        |
| E. COOHS FY 2025-26 PROGRAM NARRATIVE   | 23        |
| F. COOHS TAKEAWAYS & FUTURE CONSIDERATIONS  | 25        |

|   |               |
|---|---------------|
| <b>► SECTION 3: FIRST 5 PROGRAM &amp; BUDGET PLAN</b>                                     | <b>27</b>     |
| • SYSTEM BUILDING WITH PUBLIC PARTNERS  | 27            |
| • DUE DILIGENCE IN THE POLITICAL & RESOURCE CONTEXT                                       | 27            |
| • ASSESSING CAPACITY TO SPEND, CONTINUOUS MONITORING, AND REFINING<br>MULTI-YEAR PLANNING | 28            |
| • COMMUNITY ENGAGEMENT TO INFORM ONGOING PLANNING &<br>IMPLEMENTATION                     | 28            |
| • FIRST 5 INVESTMENT SUMMARY  | 29            |
| • FIRST 5 PROGRAM SUMMARY   | 29            |
| • FIRST 5'S TAKEAWAYS & FUTURE CONSIDERATIONS FOR THE EARLY<br>EDUCATION SYSTEM           | 30            |
| <br><b>► APPENDICES</b>   | <br><b>32</b> |
| • APPENDIX A: SHARED VISION & VALUES FOR OAKLAND'S ECE SYSTEM                             | 32            |
| • APPENDIX B: OCI ORDINANCE MANDATES & GOALS  | 33            |
| • APPENDIX C: PUBLIC PARTNER EARLY EDUCATION PRIORITIES                                   | 40            |
| • APPENDIX D: EARLY CHILDHOOD SYSTEM POLICY LANDSCAPE                                     | 42            |
| • APPENDIX E: OCI PUBLIC PARTNERS PLANNING TAKEAWAYS & FUTURE<br>CONSIDERATIONS           | 45            |
| • APPENDIX F: OUSD & COOHS SUMMARY OF INVESTMENTS BY OCI ORDINANCE<br>GOALS               | 48            |
| • APPENDIX G: LOCAL SYSTEM BUILDING WITH COMMUNITY INPUT                                  | 49            |
| • APPENDIX H: SUPPLEMENTAL DOCUMENTS  | 51            |
| <br><b>► CITATIONS</b>  | <br><b>52</b> |

## SECTION ONE

# OAKLAND UNIFIED SCHOOL DISTRICT (OUSD) PROGRAM & BUDGET ANALYSIS

### A. OVERVIEW OF OUSD ECE PROGRAM VISION & PRIORITIES

The OUSD Early Learning Department “strives to build a solid foundation of success for all children and their families” by providing access to high-quality early education.<sup>9</sup> In alignment with OCI legislation goals, each of OUSD’s early learning priorities outlined below are intended to increase enrollment either by expanding access and/or increasing the quality of their early learning opportunities (see [Appendix C: Public Partner Early Education Priorities](#)).

- Improve quality and expand opportunities for quality early learning to more of Oakland's children and families with a focus on those furthest from opportunity
- Increase family engagement
- Ensure that all 4-year-olds who graduate from PK or TK are ready for kindergarten
- Expand Multi-Tiered System of Supports (MTSS)<sup>10</sup> services and improve programs to ensure all students are getting the supports and services they need
- Expand Inclusive Services
- Improve alignment and connection within Early Learning Department & throughout OUSD

In FY 2025-26, OUSD is increasing investment to make available free or affordable high quality early education and preschool for 3- and 4-year-olds from low-income families. This investment shift is driven by the following (See also [Appendix F: OUSD and COOHS Summary of Investments By OCI Ordinance](#)):

- construction of a new Washington Child Development Center to serve up to 144 new PK/TK students by 2026-27 school year (\$15M).
- begin pre-site construction on the Garfield Elementary Campus to serve up to 168 new PK/TK students by the 2027-28 school year (\$2.1M).
- addition of 45 early literacy tutors to expand TK enrollment by 180 students to meet demand (\$2.1M)
- expand the number of STIP substitutes (Substitute Teachers Incentive Plan) to cover not only professional development time but also time to conduct IEPs meetings and cover teacher absences to maintain student ratios (\$1.1M).

### B. OUSD PROJECTED PRIORITY CHILDREN SERVED

The table below reflects the current and projected enrollment of subsidy-eligible children. OUSD plans to add three PK and five TK classrooms in FY 2025-2026. The number of child care subsidy-eligible 3- and 4-year-olds enrolled in OUSD is projected to increase by 22%—from 1,643 in 2023-24 to 1,998 in 2025-26.

**TABLE 2: OUSD PRIORITY STUDENTS SERVED SUMMARY<sup>11</sup>**

| 3–4-Year-Olds in Families with Low Incomes |                   |              |                      |              |              |
|--|-------------------|--------------|----------------------|--------------|--------------|
|  | Children Enrolled |              | Projected Enrollment |              |              |
| OUSD                                       | FY 22-23          | FY 23-24     | FY 24-25             | FY 25-26     | FY 26-27     |
| 4-yr-olds                                  | 970               | 1,134        | 1,277                | 1,379        | 1,508        |
| 3-yr-olds                                  | 375               | 509          | 573                  | 619          | 677          |
| <b>Total</b>                               | <b>1,345</b>      | <b>1,643</b> | <b>1,850</b>         | <b>1,998</b> | <b>2,185</b> |

By the end of the fourth year of implementation (July 2025 – June 2026), First 5 anticipates investing a grand total of approximately \$56 million of OCI funding in the OUSD early education system and increasing enrollment for 3- and 4-year old children by 31%—from 1,822 in 2022-23 to 2,388 in 2025-26.

### C. OCI IMPACT TO-DATE AT OUSD

Since January 2023, the OCI Early Education Fund has:

- Invested ~\$23 million to increase access to and improve quality of free early education programming and services.
- Together with state PK and TK funding served 1,906 children in 2022-23 and 2,043 children in 2023-24, more than 95 percent of whom were 3- and 4-year-olds.

#### OCI IMPACT TO-DATE AT OUSD (FY 2022-23 TO FY 2024-25)

| Fiscal Year       | Themes                    | Highlights  |
|-------------------|---------------------------|---|
| <b>FY 2022-23</b> | <b>Infrastructure</b>     | <ul style="list-style-type: none"> <li>• Preparation for site improvements to expand and preserve services (Kaiser renovations)</li> </ul>  |
|                   | <b>Capacity- Building</b> | <ul style="list-style-type: none"> <li>• Hiring and program improvements to increase the quality of services (one new family navigator)</li> </ul>  |
| <b>FY 2023-24</b> | <b>Infrastructure</b>     | <ul style="list-style-type: none"> <li>• Site expansion and improvements (150 students in nine classrooms at Kaiser facility; improvements across 75 ECE sites)</li> </ul>  |
|                   | <b>Capacity- Building</b> | <ul style="list-style-type: none"> <li>• Professional development (16 trainings for all 380 ECE staff)</li> <li>• Funding 34 full-time staff to build operational, classroom, and administrative capacity.</li> </ul>   |
|                   | <b>Service Expansion</b>  | <ul style="list-style-type: none"> <li>• One additional PK class, 5 PK SPED classes, and seven TK classes</li> <li>• Direct services staff, including coaches and family navigators</li> <li>• Family recruitment (waived fees for 74 families, parent leadership for 60 parents)</li> </ul>  |
| <b>FY 2024-25</b> | <b>Service Expansion</b>  | <ul style="list-style-type: none"> <li>• Continue site expansion and improvements (11 new TK classrooms and one new PK Special Education)</li> <li>• Family-friendly enrollment with equity focus on low-income, newcomer, refugee, and unhoused families (up to 70 new families with 3- and 4-yr-olds with low incomes)</li> </ul> |
|                   | <b>Family Support</b>     | <ul style="list-style-type: none"> <li>• Wraparound supports, family navigation, case management to address families basic needs</li> </ul>   |

|                   |                               |   |
|-------------------|-------------------------------|---|
| <b>FY 2025-26</b> | <b>Capacity- Building</b>     | <ul style="list-style-type: none"> <li>Expansion of ECE student enrollment information system to align with TK-12</li> <li>Professional development and coaching to promote quality, recruitment, and retention; focus on equity, oral language, emergent literacy, and social emotional supports (143 classrooms, 350 educators, benefiting 2,059 students)</li> </ul>   |
|                   | <b>Infrastructure</b>         | <ul style="list-style-type: none"> <li>Personnel investments to expand kinder readiness team, teacher substitute pool (+3 STIP substitutes), inclusion services, mental health programs, and early literacy tutors</li> </ul>   |
|                   | <b>Service Expansion</b>      | <ul style="list-style-type: none"> <li>Continued site expansion and improvements (7 new TK classrooms and 3 new PK classroom)</li> <li>Washington CDC facility construction &amp; pre-work for Garfield Elementary expansion, each projected to serve up to 168 new students</li> <li>Early Literacy tutors (45) to maximize enrollment</li> <li>Mental Health (expand Lincoln 20 new classrooms at 9 new sites) &amp; Inclusion Services (+2 speech pathology assistants)</li> </ul> |
|                   | <b>Capacity-Building</b>      | <ul style="list-style-type: none"> <li>Expand the Family Navigator program to support special education</li> <li>Targeted outreach &amp; streamline enrollment processes to increase families access to PK/TK programming.</li> <li>Professional development followed by reflective coaching</li> </ul>   |
|                   | <b>Kindergarten Readiness</b> | <ul style="list-style-type: none"> <li>Targeted early literacy development PD (Tandem to serve 11 more classrooms for a total of 152 by June 2026), Summer Bridge program (12-16 classes at 15+ sites) and transition supports</li> </ul>   |

## D. OUSD MULTI-YEAR BUDGET SUMMARY

| Expense                | FY 22-23 Actual    | FY 23-24 Actual     | FY 24-25 Revised Budget | FY 25-26 Budget     | Change from FY24-25 Budget |             | Planning Budget <sup>12</sup> |
|------------------------|--------------------|---------------------|-------------------------|---------------------|----------------------------|-------------|-------------------------------|
|                        |                    |                     |                         |                     | Amount                     | %           | FY 26-27 Budget               |
| <b>Direct Services</b> | \$441,470          | \$2,855,952         | \$9,587,507             | \$10,014,293        | \$486,777                  | 8%          | \$10,515,008                  |
| <b>Admin Services</b>  | -                  | \$610,270           | \$2,435,389             | \$2,620,726         | \$125,346                  | 10%         | \$2,751,762                   |
| Baseline Budget        | \$441,470          | \$3,466,222         | \$12,022,896            | \$12,635,019        | \$612,123                  | 9%          | \$13,266,770                  |
| One-Time Costs         | -                  | \$4,629,422         | \$2,474,400             | \$20,317,435        | \$17,843,035               | 721%        | \$2,500,000                   |
| <b>Total Expenses</b>  | <b>\$441,470</b>   | <b>\$8,095,644</b>  | <b>N/A</b>              | <b>N/A</b>          | <b>N/A</b>                 | <b>N/A</b>  | <b>N/A</b>                    |
| <b>GRAND TOTAL</b>     | <b>\$6,026,000</b> | <b>\$11,892,159</b> | <b>\$14,497,296</b>     | <b>\$32,952,454</b> | <b>\$18,455,158</b>        | <b>155%</b> | <b>\$15,766,770</b>           |
| % Spent                | 7%                 | 68%                 | N/A                     | N/A                 | N/A                        | N/A         | N/A                           |
| Total FTE              | 1                  | 34                  | 48.4                    | 100                 | 51.6                       | 107%        | 100                           |



## E. OUSD FY 2025-26 PROGRAM NARRATIVE

OUSD's investments for FY 2025-26 demonstrates the district's clear commitment to maximizing access to quality early learning opportunities, expanding inclusive and nurturing environments, strengthening family and community engagement, and building sustainable early childhood systems. Key investments include new and preserved child spaces, expanded MTSS and literacy support staffing, enhanced transition programs, targeted mental health partnerships, and robust professional development for educators.

| Shared Vision & Values  | Themes   | Investment Highlights & Alignment with OUSD Priorities  | Community Listening Session Priorities   |
|---|--|---|--|
| <b>Maximize Access &amp; Enrollment</b><br><b>\$22M (67%)</b> | <b>Personnel</b><br><b>(49 FTE)</b><br><b>\$2.9M</b>                 | <p><b>OUSD Priority:</b> Expand opportunities for quality early learning to more of Oakland's children and families with a focus on those furthest from opportunity</p> <p><b>Strategy Highlight:</b> Hire additional classroom staff to maximize TK enrollment, meet demand, and maintain lower student-educator ratios.</p> <p><b>Cost Driver Highlight:</b> FY 25-26 Personnel increases are largely driven by the addition of 45 tutors, which adds a third adult in the early education classrooms to maximize enrollment (\$2.1M).</p> <p><b>Expected Impact:</b></p> <ul style="list-style-type: none"> <li>• Tutors will expand availability of care and enhance quality for 180 more children at high-demand sites</li> <li>• Additional staffing costs support the entire OUSD early childhood system, totaling 2,388 3- and 4-year-old children</li> </ul>   | <p><b>CLASSROOM EXPERIENCES</b><br/>Lower educator-child ratios and improve curriculum</p> |
|   | <b>Build New or Preserve Existing Child Spaces</b><br><b>\$18.7M</b> | <p><b>OUSD Priority:</b> Expand opportunities for quality learning to more of Oakland's children and families and address district-wide unmet PK and TK demands.</p> <p><b>Strategy Highlight:</b> Reopen Washington CDC site and begin the pre-work for a similar expansion at Garfield Elementary.</p> <p><b>Cost Driver Highlight:</b> Facility investments continue to be the largest investment to maximize access and enrollment, growing by \$13.8M in FY 25-26. Facilities investments account for 57% of the total OUSD Program Budget for this fiscal year.</p> <p><b>Expected Impact:</b></p> <ul style="list-style-type: none"> <li>• Reopening Washington CDC, which has a waitlist of 781 children, will add 6 new classrooms, serving up to 144 new students.</li> <li>• The Garfield Elementary expansion will also add 7 new classrooms to serve up to 168 new students.</li> <li>• This one-time cost to create a "hub model" on an elementary school campus with many cost efficiencies and community benefits that may serve as a replicable roadmap for when State facilities funds are released.</li> </ul> | <p><b>FACILITIES</b><br/>Invest in facilities and infrastructure improvements</p>          |

|   |   |  |   |
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|   | <p><b>Family Outreach &amp; Enrollment</b><br/><b>\$260K</b></p>                | <p><b>OUSD Priority:</b> Increase family engagement.</p> <p><b>Strategy Highlight:</b> Improve and streamline enrollment systems to ease the burden on families &amp; utilize geographic mapping tools to support targeted outreach and materials.</p> <p><b>Cost Driver Highlight:</b> After an initial investment in Enrollwise to integrate ECE into the TK-12 enrollment and reporting system, the total investment was decreased by \$292K (-74%) due to the declining need for additional upgrades.</p> <p><b>Expected Impact:</b> Increase access to PK and TK programming to high needs families based on targeted outreach strategies that combine geographic information system map by zip codes, age group and school zone.</p>   | <p><b>OUTREACH</b><br/>Expand culturally and linguistically responsive outreach</p> <p><b>FAMILY SUPPORTS &amp; BASIC NEEDS</b><br/>Centralize wraparound family supports and navigation</p>    |
|   | <p><b>Transition Support &amp; Kindergarten Readiness</b><br/><b>\$131K</b></p> | <p><b>OUSD Priority:</b> Ensure that all 4-year-olds who graduate from PK or TK are ready for kindergarten.</p> <p><b>Strategy Highlight:</b> Invest in the Summer Bridge program, a key transition support for students entering TK or Kindergarten who have little to no PK experience.</p> <p><b>Cost Driver Highlight:</b> Summer Bridge continues to be funded primarily by Title 1 with OCI funds (\$56K) added to support Special Ed Coaches for IEPs, admin support, and three floating teachers.</p> <p><b>Expected Impact:</b> Target populations include those further from opportunity, including newcomers/refugees, students experiencing homelessness (McKinney Vento), and neurodivergent students across 15+ sites PK sites (CDC and elementary).</p>   | <p><b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br/>Enhance access to equitable PD and career pipelines</p>  |
| <p><b>Equitable &amp; Nurturing Environment</b><br/><b>\$6.6M (20%)</b></p> | <p><b>Personnel (35 FTE)</b><br/><b>\$4.5M</b></p>                              | <p><b>OUSD Priority:</b> Expand MTSS services and improve programs to ensure all students are getting the support and services they need.</p> <p><b>Strategy Highlight:</b> Hire additional support staff to expand and improve inclusion services.</p> <p><b>Cost Driver Highlight:</b> As OUSD adds seven TK and three PK classrooms, personnel to support quality, nurturing environments also expand, including three (3) new MTSS staff, two (2) coaches, and three (3) STIP substitutes assigned to PK sites (8 new staff: \$1.1M).</p> <p><b>Expected Impact:</b></p> <ul style="list-style-type: none"> <li>• MTSS expansion supports all projected 2,388 3- and 4-year-old children, system-wide.</li> <li>• STIP substitutes will support maintaining teacher-student ratios at 3 new PK sites.</li> <li>• Coaches will support the expansion of seven new TK sites and three new PK classes.</li> </ul> | <p><b>FAMILY SUPPORTS &amp; BASIC NEEDS</b><br/>Centralize wraparound family supports and navigation</p> <p><b>INCLUSION SUPPORTS</b><br/>Invest in inclusive classrooms and staff training</p> |

|   |  |   |
|---|--|---|
| <p><b>Mental Health &amp; Inclusion</b><br/><b>\$1M</b></p>             | <p><b>OUSD Priority:</b> Expand MTSS services and improve programs to ensure all students are getting the support and services they need.</p> <p><b>Strategy Highlight:</b> Build on existing partnership with Lincoln Families to provide children with on-site early childhood mental health support.</p> <p><b>Cost Driver Highlight:</b> OUSD’s existing contract with Lincoln Families expands from 19 ECE sites (funded by OFCY) to nine (9) additional ECE sites covering 20 Pre-K and TK classrooms (OCI \$500K).</p> <p><b>Expected Impact:</b> Expanding the work with Lincoln Families using OCI funds ensures all early childhood classrooms have access to mental health support, which will serve up to 1,200 children.</p>  | <p><b>FAMILY SUPPORTS &amp; BASIC NEEDS</b><br/>Centralize wraparound family supports and navigation</p> <p><b>INCLUSION SUPPORTS</b><br/>Invest in inclusive classrooms and staff training</p> |
| <p><b>Professional development &amp; Coaching</b><br/><b>\$816K</b></p> | <p><b>OUSD Priority:</b> Ensure that all of the 4-year-olds who graduate from PK or TK are ready for kindergarten.</p> <p><b>Strategy Highlight:</b> Partner with SEEDS of Learning and Tandem StoryCycles® to focus on early literacy skills development.</p> <p><b>Expected Impact:</b></p> <ul style="list-style-type: none"> <li>• Implement Tandem StoryCycles® program to serve 11 more classrooms with OCI funds. Tandem supports early literacy development and provides access to high-quality, multicultural and multilingual age-appropriate books.</li> <li>• SEEDS of Learning to train all PK and TK teachers and support staff with the knowledge to develop oral language, emergent literacy, social skills, and social regulation skills in 3-5-year-olds to ensure they are ready for kindergarten.</li> </ul> | <p><b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br/>Enhance access to equitable PD and career pipelines</p>  |
| <p><b>Classroom Support</b><br/><b>\$275K</b></p>                       | <p><b>OUSD Priority:</b> Improve quality in all OUSD Early Learning Environments.</p> <p><b>Strategy Highlight:</b> Provide developmentally appropriate classroom activities and outside play area materials to provide high-quality early care and education programming in TK classrooms.</p> <p><b>Cost Driver Highlight:</b> After OCI investments upgraded aging technology in most classrooms in FY 24-25, the technology investments in FY 25-26 are significantly reduced (-\$425K) for new classrooms and ongoing technology maintenance.</p> <p><b>Expected Impact:</b> Classroom materials will support all classrooms, with particular focus on five new TK classes and the toileting supplies for younger children.</p>   | <p><b>CLASSROOM EXPERIENCES</b><br/>Lower educator-child ratios and improve curriculum</p> <p><b>FACILITIES</b><br/>Invest in facilities and infrastructure improvements</p>                    |

|   |  |  |   |
|---|--|--|---|
| <b>Child, Family &amp; Community-Centered<br/>\$1.9M (6%)</b>           | <b>Personnel<br/>(13 FTE)<br/>\$1.7M</b> | <p><b>OUSD Priority:</b> Increase family engagement strategies.</p> <p><b>Strategy Highlight:</b> Expand the Family Navigator program to support increased access and enrollment for Special Ed families. Add Culture Keepers at two Child Development Centers to preserve enrollment and maintain safety in school grounds.</p> <p><b>Expected Impact:</b></p> <ul style="list-style-type: none"> <li>• Hire one additional Family Navigator (increase from 9 to 10), who will support Special Education enrollment for PK and TK classrooms.</li> <li>• The Culture Keepers will serve three high need CDCs (Laurel, UN, and Burbank) to preserve enrollment and maintain positive relationships with families and community.</li> </ul> | <p><b>PRIORITY POPULATIONS</b><br/>Increase navigators and prioritize marginalized groups</p> <p><b>OUTREACH</b><br/>Expand culturally and linguistically responsive outreach</p>               |
|   | <b>Wraparound Supports<br/>\$171K</b>    | <p><b>OUSD Priority:</b> Expand inclusion services.</p> <p><b>Strategy Highlight:</b> Invest in home visiting programs to provide access to screening, community resources, and bilingual enrollment materials.</p> <p><b>Cost Driver Highlights:</b> Invest paid time for educators to provide home visits to support successful transitions to TK and Kindergarten (\$150K).</p> <p><b>Expected Impact:</b> Investments projected to serve 700 PK kids and 156 Special Ed PK kids.</p>   | <p><b>INCLUSION SUPPORTS</b><br/>Invest in inclusive classrooms and staff training</p> <p><b>FAMILY SUPPORTS &amp; BASIC NEEDS</b><br/>Centralize wraparound family supports and navigation</p> |
| <b>Partner to Strengthen an Early Childhood System<br/>\$2.4 M (7%)</b> | <b>Personnel<br/>(3.0FTE)<br/>\$660K</b> | <p><b>OUSD Priority:</b> Improve alignment and connection within Early Learning Department &amp; throughout OUSD.</p> <p><b>Strategy Highlight:</b> Invest in administrative staff to provide overall oversight of ECE programming and staff to support teachers applying for their credentials.</p> <p><b>Expected Impact:</b> Administrative staff provide system-wide support and capacity-building for data and reporting, oversight and compliance, and support for educators and families, supporting an anticipated 2,388 3- and 4-year-old children.</p>   | <p><b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br/>Enhance access to equitable PD and career pipelines</p>  |
|   | <b>Workforce &amp; Quality<br/>\$67K</b> | <p><b>OUSD Priority:</b> Improve alignment and connection within Early Learning Department &amp; throughout OUSD.</p> <p><b>Strategy Highlight:</b> Invest in a youth apprenticeship partnership with Skyline High School to expand students' educational opportunities and develop an ECE workforce pipeline.</p> <p><b>Expected Impact:</b> Enroll eight high school students in a youth apprenticeship cohort.</p>  | <p><b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br/>Enhance access to equitable PD and career pipelines</p>  |

|   |   |   |  |
|---|---|---|--|
|   | <b>Administrative/<br/>Indirect Costs<br/>\$1.7M</b>  | OUSD's indirect cost rate for FY 25-26 is 3.46%, as approved by the California Department of Education. |  |
| <b>Leveraging<br/>Resources<br/>\$42.6M</b> | As mandated by the OCI legislation to blend other local, state, and federal funding sources, OUSD is leveraging State contracts, such as CDE General CSPP contracts, CSPP-QRIS-BG, Early Education Teacher Development (EETD) Grant, and Inclusive Early Education Expansion Program (IEEEP), amongst other funding streams, to support these OCI investments while expanding and leveraging OCI funds. |   |  |

## F. OUSD TAKEAWAYS & FUTURE CONSIDERATIONS

OUSD has advanced early childhood integration across TK-12 through leadership, workforce expansion, data improvements, and inclusive practices. Moving forward, sustaining these gains will require continued investment and strategic support for system leadership, equity, expanded care models, preschool readiness, and fiscal management, alongside continued community-driven enhancements to systems navigation, family outreach, inclusion, and facilities.

### SYSTEMS STRENGTHS & ACCOMPLISHMENTS TO BUILD UPON

- **Leadership & Strategic Alignment:** Strong leadership and vision enabled integration of early childhood priorities into TK-12 system building.
- **Workforce Stability:** Expanded staffing infrastructure through hiring early literacy tutors, paraeducators, and Substitute Teacher Incentive Plan (STIP) subs. Hiring additional classroom staff creates opportunities for teachers to access professional development and coaching during work hours while maintaining classroom ratios.
- **Data & Technology Infrastructure:** Improved system connectivity between PK-TK-12 with OCI-funded tools like Aeries and Enrollwise.
- **Enrollment Gains:** Expanded enrollment through family navigation programs and subsidy-eligible site renovations.

### SYSTEMS CONSIDERATIONS FOR FUTURE PLANNING

- **Leadership Transitions:** With the Superintendent's transition, ensure new OUSD leadership remains engaged and sustains OCI-aligned vision, initiatives, and investments.
- **Balance in Funding Facilities and Programs:** Analyze trade-offs between capital investments and direct service expansions.
- **Before and After School Care:** Explore and, if appropriate, develop and coordinate mixed-delivery care and transportation models responsive to family needs.
- **Equity in Investment Distribution:** Monitor geographic and demographic equity in OCI investments using mapping tools and needs assessments.



- **Expansion to Younger Ages:** Prepare for California State Preschool Program's (CSPP) 2-year-old eligibility expansion and related facility and curriculum needs.
- **Data Systems:** Continue refining data reporting, including disaggregation by demographics and geography.
- **Fiscal Monitoring:** Track timely use of funds to optimize investments in services and facilities.
- **Federal and State Funding and Policy Landscape:** Continued to monitor and assess local impacts due to federal and state shifts and reductions, including cuts at the California Department of Education.

## SECTION TWO

# CITY OF OAKLAND HEAD START (COOHS) PROGRAM AND BUDGET ANALYSIS

### A. OVERVIEW OF COOHS ECE PROGRAM VISION & PRIORITIES

COOHS is dedicated to attracting highly qualified teaching staff who bring expertise in child development. By enhancing program quality and fostering welcoming, inclusive learning environments, COOHS aims to improve access to early learning opportunities and increased enrollment. COOHS recognizes that access, workforce development and retention, as well as quality programming, are inherently linked to one another. In alignment with OCI legislation goals, each of COOHS early learning priorities outlined below are intended to increase enrollment either by strengthening community partnerships, expanding access to high-needs families, and/or increasing the quality of their early learning opportunities (see [Appendix C: Public Partner Early Education Priorities](#) for full definitions):

- Workforce Development & Retention
- Program Sustainability
- Expand Opportunities for Quality Improvement
- Expand ECE Partnerships
- Family Outreach & Engagement

### B. COOHS PROJECTED PRIORITY CHILDREN SERVED

The table below reflects enrollment and projected enrollment at COOHS centers, partner centers, and Family Child Care (FCC) providers, and home visiting programs. Children enrolled for FY 2022-present refers to a point-in-time enrollment snapshot from January. Beginning in FY 2024-2025, COOHS plans to expand service offerings by opening four new classrooms in two new centers while adding capacity at partner family child care sites, partner family, friend, and neighbor providers, and home-based services.

**TABLE 3: COOHS PRIORITY CHILDREN SERVED SUMMARY<sup>13</sup>**

| 3–4-Year-Olds in Families with Low Incomes                          |                   |           |                      |           |           |
|---|-------------------|-----------|----------------------|-----------|-----------|
|   | Children Enrolled |           | Projected Enrollment |           |           |
|   | FY 22-23          | FY 23-24  | FY 24-25             | FY 25-26  | FY 26-27  |
| COOHS: Children served by OCI at Arroyo, Franklin, and Tassafaronga |                   |           |                      |           |           |
| 4 yr-olds   | 12                | 7         | 34                   | 34        | 34        |
| 3 yr-olds   | 11                | 6         | 14                   | 14        | 14        |
| <b>Total</b>  | <b>23</b>         | <b>13</b> | <b>48</b>            | <b>48</b> | <b>48</b> |

| COOHS: Children served by OCI at all sites |           |           |            |            |            |
|--|-----------|-----------|------------|------------|------------|
| 4 yr-olds                                  | 12        | 7         | 82         | 131        | 131        |
| 3 yr-olds                                  | 11        | 6         | 46         | 63         | 63         |
| <b>Total</b>                               | <b>23</b> | <b>13</b> | <b>128</b> | <b>194</b> | <b>194</b> |

## COOHS DATA REPORTING & ESTIMATED COST PER PUPIL CHALLENGES

Due to privacy regulations, as reported by COOHS, the initial Data Sharing Agreement (DSA) was limited to the three sites fully funded by OCI (Tassafaronga, Franklin, and Arroyo Viejo) and did not reflect the number of children system-wide benefiting from OCI investments, reflecting an outsized and inaccurate cost per child. First 5 and COOHS have since finalized a robust DSA including identified individual level data on all children projected to benefit from OCI investments, which First 5 anticipates will address some of these concerns.

### C. OCI IMPACT TO-DATE AT COOHS

Since January 2023, in COOHS, the Early Education Fund, alongside concurrent efforts, has:

- Invested ~\$11.4 million in COOHS to increase access to free early education programming and services.
- Served 37 children in 2022-23 and 19 children in 2023-24, two-thirds of whom were 3- and 4-year-olds.
- Delivered 35 hours professional development each to early educators in 2023-24 (per educator, on average).
- Maintained 52 free and subsidized child care slots in 2022-23 and 2023-24.
- Funded 43 full-time staff in 2023-24 to build operational, classroom, and administrative capacity.

By the end of the fourth year of implementation (July 2025 – June 2026), First 5 anticipates investing \$18.6 million in COOHS's public early education system and increasing children 5 and under served by COOHS from 37 in FY 2022-23 to **288 in FY 2025-26** (including 94 children 0-2, children benefitting from FCC, Family, Friend, and Neighbor (FFN) caregivers, and system-wide investments in FY 2025-26).

| OCI IMPACT TO-DATE AT COOHS (FY 2022-23 TO FY 2024-25) |                             |  |
|--|-----------------------------|--|
| Fiscal Year  | Themes                      | Highlights   |
| <b>FY 22-23</b>  | <b>Infrastructure</b>       | <ul style="list-style-type: none"> <li>• Site improvements (educational materials across three sites)</li> </ul>   |
|  | <b>Capacity- Building</b>   | <ul style="list-style-type: none"> <li>• Professional development (106 total staff, STEM training, coaching)</li> <li>• Parent engagement (parent education classes and translation software)</li> </ul> |
|  | <b>Program Preservation</b> | <ul style="list-style-type: none"> <li>• Preservation of three sites and teaching staff (Tassafaronga, Franklin, and Arroyo Viejo)</li> </ul>  |
| <b>FY 23-24</b>  | <b>Infrastructure</b>       | <ul style="list-style-type: none"> <li>• Site improvements (educational materials and resources across four ECE sites)</li> </ul>  |
|  | <b>Capacity- Building</b>   | <ul style="list-style-type: none"> <li>• Professional development for all (28 teaching staff – PD and coaching)</li> </ul>   |

|                 |  |  |
|-----------------|--|--|
| <b>FY 24-25</b> | <b>Service Expansion</b>                 | <ul style="list-style-type: none"> <li>Start of expansion at new West Oakland site – two classrooms to begin serving 24 children in Spring 2026</li> <li>Start of expansion of mixed delivery systems investments (two to four FCCs, 12 Family Friend and Neighbor (FFN) caregivers – budgeted in FY 24-25 with services to begin in FY 25-26)</li> </ul>  |
|                 | <b>Infrastructure</b>                    | <ul style="list-style-type: none"> <li>Site renovations and improvements</li> <li>Implementation of a multi-tiered teaching staff classification (Teacher &amp; Associate Teacher I, II, and III) to advance and retain qualified teaching staff while promoting continuity of care.</li> <li>Assurance of program sustainability through support for day-to-day program operations and administrative functions (E.g.: cooks, mechanics, rent, utilities, etc.).</li> </ul> |
| <b>FY 25-26</b> | <b>Facilities Improvements</b>           | <ul style="list-style-type: none"> <li>Renovation of West Oakland Site to open in Spring 2026 to steadily increase the number of families and children served (up to 24 new students).</li> </ul>  |
|                 | <b>Capacity Building</b>                 | <ul style="list-style-type: none"> <li>Workforce pathways for the annual cohort of 18 apprentices to earn credentials in early childhood education</li> </ul>  |
|                 | <b>Community Partnerships Expansions</b> | <ul style="list-style-type: none"> <li>Expansion of number of participating Family Child Care providers serving 14 additional children.</li> <li>Expansion of number of FFNs supported through OCI, serving a total of 12 children.</li> </ul>   |

#### D. COOHS MULTI-YEAR BUDGET SUMMARY

| Expense                | FY 22-23 Actual    | FY 23-24 Actual    | FY 24-25 Revised Budget | FY 25-26 Budget    | Change from FY24-25 Budget |            | Planning Budget <sup>14</sup> |
|------------------------|--------------------|--------------------|-------------------------|--------------------|----------------------------|------------|-------------------------------|
|                        |                    |                    |                         |                    | Amount                     | %          | FY 26-27 Budget               |
| <b>Direct Services</b> | \$2,207,806        | \$1,799,673        | \$4,454,177             | \$4,527,467        | \$73,290                   | 2%         | \$4,753,841                   |
| <b>Admin Services</b>  | \$132,278          | \$647,682          | \$2,145,823             | \$2,187,260        | \$41,437                   | 2%         | \$2,296,623                   |
| Baseline Budget        | \$2,340,084        | \$2,447,355        | \$6,600,000             | \$6,714,727        | \$114,727                  | 2%         | \$7,050,464                   |
| One-Time Costs         | -                  | -                  | -                       | \$546,850          | \$546,850                  |            | TBD                           |
| <b>Total Expenses</b>  | <b>\$2,340,084</b> | <b>\$2,447,355</b> | <b>n/a</b>              | <b>n/a</b>         | <b>n/a</b>                 |            | <b>n/a</b>                    |
| <b>GRAND TOTAL</b>     | <b>\$2,340,084</b> | <b>\$2,447,355</b> | <b>\$6,600,000</b>      | <b>\$7,261,577</b> | <b>\$661,577</b>           | <b>10%</b> | <b>\$7,050,464</b>            |
| % Spent                | 91%                | 37%                | n/a                     | n/a                | n/a                        |            | n/a                           |
| Total FTE              | 33                 | 43                 | 37                      | 37                 | 0                          | 0%         | 37                            |

## NAVIGATING COOHS SPENDING CAPACITY CHALLENGES

When negotiating the OCI multi-year contracts, COOHS initially requested \$11.9M for FY 2024-2025, an 81% increase from their FY 2023-24 allocation. However, COOHS was only able to spend \$2.4M of their \$6.6M budgeted allocation in FY 2023-24. Given the size of their initial request, perception of outsized cost per pupil, and prior patterns of expenditure and under enrollment, as well as the anticipated heightened scrutiny on these local tax dollars, First 5 requested further direction from the Oakland City Administrator regarding the proposed FY 2024-25 budget request for COOHS. In September 2024, the City Administrator approved a revised FY 2024-25 budget amount for COOHS at \$6.6M and directed COOHS to revise their FY 2024-25 Program Plan and Budget accordingly.<sup>15</sup> First 5 will continue to monitor COOHS' ability to spend OCI funds. The FY 2025-26 plan continues to be largely personnel costs, making up 80% of baseline funding. COOHS' capacity to spend OCI funding will largely be dependent on their ability to hire and retain their workforce - both direct and administrative positions. Please see [Appendix H1. First 5 Memo to the City of Oakland re: Oakland Children's Initiative Program & Budget, City of Oakland Head Start FY 2024-25, April 2025.](#)

## E. COOHS FY 2025-26 PROGRAM NARRATIVE

COOHS' FY 2025-26 investment plan reflects a strong commitment to maximizing access to early learning, nurturing high-quality environments, centering families and communities, and strengthening system-wide infrastructure. Significant personnel investments aim to sustain operations and support program growth, while partnerships and leveraged funding ensure that COOHS remains responsive to the needs of children and families, particularly those furthest from opportunity.

| Shared Vision & Values   | Themes                                     | Investment Highlights & Alignment with OUSD Priorities   | Community Listening Session Priorities   |
|--|--|--|--|
| <b>Maximize Access &amp; Enrollment</b><br><b>\$4.2M (58%)</b> | <b>Personnel (27 FTE)</b><br><b>\$3.4M</b> | <p><b>COOHS Priority:</b> Workforce development and retention</p> <p><b>Strategy Highlight:</b> Increase site staff to maximize enrollment in available slots and administrative staff to support system-wide coordination.</p> <p><b>Cost Driver Highlight:</b> Personnel that maximize access and enrolment continues to be the largest investment in the budget (46%). This includes educators, directors, cooks, couriers and mechanics. New staff include one director and five educators to begin serving students at the new West Oakland site in Spring 2026.</p> <p><b>Expected Impact:</b></p> <ul style="list-style-type: none"> <li>• System-wide positions anticipated to impact 288 children served across the COOHS system (assumes 94 children ages 0-2)</li> <li>• West Oakland site expansion expected to serve 24 children</li> </ul> | <p><b>PRIORITY POPULATIONS</b></p> <p>Increase family navigators and prioritize child care access to marginalized families</p> |



|   |  |  |   |
|---|--|--|---|
| <b>Maximize Access &amp; Enrollment</b><br><b>\$4.2M (58%)</b>      | <b>Build New Child Spaces</b><br><b>\$500K</b> | <p><b>COOHS Priority:</b> Expand opportunities for quality improvement</p> <p><b>Strategy Highlight:</b> Open a new West Oakland site at Bethlehem Elementary Lutheran Church.</p> <p><b>Cost Driver Highlight:</b> Renovations to existing child care center are projected to begin serving children in Spring 2026 (\$500K).</p> <p><b>Expected Impact:</b> This site will open two new classrooms, serving up to 24 children.</p>     | <p><b>FACILITIES</b><br/>Invest in facilities and infrastructure improvements</p>   |
|   | <b>Maintain Child Spaces</b><br><b>\$321K</b>  | <p><b>COOHS Priority:</b> Program sustainability</p> <p><b>Strategy Highlight:</b> Continue investing in the maintenance of the three OCI fully funded sites.</p> <p><b>Expected Impact:</b> Anticipate serving up to 48 children.</p>   | <p><b>FACILITIES</b><br/>Invest in facilities and infrastructure improvements</p>   |
| <b>Equitable &amp; Nurturing Environment</b><br><b>\$332K (4%)</b>  | <b>Personnel (1 FTE)</b><br><b>\$167K</b>      | <p><b>COOHS Priority:</b> Workforce development and retention</p> <p><b>Strategy Highlight:</b> Hire an additional coach to provide support to their ECE teaching staff.</p> <p><b>Expected Impact:</b> Ensure teachers implement developmentally appropriate practices, engage in meaningful teacher-child interactions, and create culturally and linguistically early childhood environments to enhance learning and development.</p> | <p><b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br/>Enhance access to equitable PD opportunities and career pipelines</p>          |
|   | <b>Classroom Support</b><br><b>\$141K</b>      | <p><b>COOHS Priority:</b> Expand opportunities for quality improvement</p> <p><b>Strategy Highlight:</b> Invest in classroom specialist services to ensure young children can access quality early learning opportunities.</p> <p><b>Expected Impact:</b> Supporting up to 288 children system-wide (assumes 94 children ages 0-2)</p>   | <p><b>CLASSROOM EXPERIENCES</b><br/>Lower educator-child ratios to improve program quality and meet children's individual needs</p> |
|   | <b>PD and Coaching</b><br><b>\$24K</b>         | <p><b>COOHS Priority:</b> Workforce development and retention</p> <p><b>Strategy Highlight:</b> Continue investing in PD and coaching to provide ECE educators with continuous learning and career progression opportunities.</p> <p><b>Expected Impact:</b> Supporting up to 288 children system-wide (assumes 94 children ages 0-2).</p>   | <p><b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br/>Enhance access to equitable PD opportunities and career pipelines</p>          |
| <b>Child, Family &amp; Community-Centered</b><br><b>\$361K (5%)</b> | <b>Personnel (2 FTE)</b><br><b>\$292K</b>      | <p><b>COOHS Priority:</b> Family outreach and engagement</p> <p><b>Strategy Highlight:</b> Invest in family service specialists to provide wraparound supports in addition to early learning opportunities.</p> <p><b>Expected Impact:</b> Supporting up to 288 children system-wide (assumes 94 children ages 0-2)</p>  | <p><b>FAMILY SUPPORTS &amp; BASIC NEEDS</b><br/>Centralize wraparound family supports and navigation</p>                            |

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|   |  |   | <b>PRIORITY POPULATIONS</b><br>Increase family navigators and prioritize child care access to marginalized families  |
|   | <b>Family Engagement &amp; Services</b><br><b>\$69K</b>    | <b>COOHS Priority:</b> Family outreach and engagement<br><br><b>Strategy Highlight:</b> Continue to invest in materials and administrative needs to support implementing family engagement and enrollment, mental health, developmental screening, health and disability services.<br><br><b>Expected Impact:</b> Supporting up to 288 children system-wide (assumes 94 children ages 0-2)  | <b>OUTREACH</b><br>Expand culturally and linguistically responsive outreach to high needs families<br><br><b>CLASSROOM EXPERIENCES</b><br>Lower educator-child ratios to improve program quality and meet children's individual needs                        |
| <b>Partner to Strengthen an Early Childhood System</b><br><b>\$2.4M (33%)</b> | <b>Personnel (6 FTE)</b><br><b>\$1.4M</b>                  | <b>COOHS Priority:</b> Program sustainability<br><br><b>Strategy Highlight:</b> Invest in administrative staff who can support the implementation of OCI and coordinate with partners to strengthen the early childhood system.<br><br><b>Expected Impact:</b> Administrative staff provide system-wide support, including data and finance reporting, compliance, and program operations. Supporting up to 288 children system-wide (assumes 94 children ages 0-2) | <b>HOURS OF OPERATION &amp; LOCATION</b><br>Expand extended-hour and overnight care options  |
|   | <b>FFN Partnerships Personnel (1 FTE)</b><br><b>\$150K</b> | <b>COOHS Priority:</b> Expand ECE partnership<br><br><b>Strategy Highlight:</b> Invest in a Home Visiting position to expand the number of Family, Friends, and Neighbors (FFN) caregivers served.<br><br><b>Expected Impact:</b> One home visitor will support 12 FFN caregivers to increase child care access to an additional 24 children.   | <b>FAMILY SUPPORTS &amp; BASIC NEEDS</b><br>Centralize wraparound family supports and navigation   |
|   | <b>FCC Partnerships</b><br><b>\$235K</b>                   | <b>COOHS Priority:</b> Expand ECE partnership<br><br><b>Strategy Highlight:</b> Expand existing subcontract with BANANAS to support licensed Family Child Care (FCC) providers to receive quality improvement services, wraparound and professional development supports.<br><br><b>Expected Impact:</b> The expanded subcontract with BANANAS will serve two to four licensed FCC providers.   | <b>OUTREACH</b><br>Expand culturally and linguistically responsive outreach to high needs families through a mixed-delivery system<br><br><b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br>Enhance access to equitable PD opportunities and career pipelines |

|   |  |  |  |
|---|--|--|--|
|   | <b>Admin/<br/>Indirect Costs<br/>\$622K</b>  | Approved 9.37% indirect cost rate applied to ongoing baseline costs and one-time cost to renovate the new West Oakland site. |  |
| <b>Leveraging<br/>Resources<br/>\$24.4M</b> | Leveraged funding includes City of Oakland General Fund, Child & Adult Care Food Program (CACFP - US Department of Agriculture), Federal Head Start Funds (US Department of Health & Human Services), California State Preschool Program (CSPP – CA Department of Education), Child Care and Development Program (CA Department of Social Services). |  |  |

## F. COOHS TAKEAWAYS & FUTURE CONSIDERATIONS

### SYSTEMS STRENGTHS & ACCOMPLISHMENTS TO BUILD UPON

- **Community, Family and Child-Centered Model:** Embedded wraparound supports such as transportation, mental health, and food access into operations.
- **Workforce Development:** Implemented tiered teaching classifications to support career advancement.
- **Mixed Delivery Expansion:** Partnered with FCCs and FFNs to diversify service delivery.
- **Program Sustainability:** Renovated facilities and supported fully OCI-funded sites for operational stability.
- **Family Engagement:** Strengthened family engagement practices through outreach, home visiting, and leadership models.

### SYSTEMS CONSIDERATIONS FOR FUTURE PLANNING

- **Leadership Participation:** Guarantee that City of Oakland and/or COOHS leadership participate in systems leaders planning meetings facilitated by School Readiness Consulting, particularly with the turbulence that Head Start is experiencing with local and federal budget cuts, to ensure system alignment.
- **Spending Capacity:** Continue close financial monitoring, including tracking of COOHS's year-over-year spending patterns, to assess underspending challenges.
- **Fiscal Management and Oversight:** Deepen collaboration with the City of Oakland to strengthen fiscal management, reporting, and oversight practices, and ensure timely submission of requested information and data and financial reports.
- **Data Reporting:** Enhance data collection, reporting and systems to ensure robust accountability measures and to document the full programmatic impact of OCI investments.
- **Estimated Costs Per Pupil:** Continue to analyze the cost per pupil, particularly as First 5 begins receiving COOHS system-wide data, which will provide a more accurate estimated cost per pupil.
- **Program Monitoring:** Continue to track progress on staffing recruitment and enrollment levels across both new and existing sites.

## SECTION THREE

# FIRST 5 PROGRAM & BUDGET PLAN

### SYSTEM BUILDING WITH PUBLIC PARTNERS

First 5's intermediary role is critical in navigating political, financial, and operational complexities in building a citywide early childhood system. This comes at a moment of significant local leadership transitions (new mayor, new superintendent, longstanding vacancies for Oakland Human Services Dept Director, and staff vacancies at City of Oakland Head Start) along with Federal cuts and upheaval. These are challenging administrative conditions for system building with locally litigated tax money. FY 2025-26 includes \$6.3M in administrative and programmatic investments to support coordination, evaluation, and stakeholder engagement.

In FY 2024-25, First 5 established a set of parameters to guide our analysis of the FY 2025-26 program and budget recommendations grounded in prior analyses and spending capacity, community input, data trends, partner priorities, and OCI legislative mandates. The following parameters were shared with the public systems partners and discussed in the bi-weekly workgroup meetings.

#### PARAMETERS

- Spending in compliance with the legislation, particularly:
  - Increasing the number of children served through the investments
  - Expanding administrative capacity, financial, analytics, planning, program design
- Developing and reporting accurately on the number of children benefitting from OCI
  - Developing a cost allocation plan that accounts for OCI funding benefiting children
- Developing and operationalizing program plans
- Meeting reporting and invoicing in a timely and accurate manner
- Implementing one-time capital projects

First 5 continues to work with our public partner leadership and program staff to identify and build upon each partner's systems and program design strengths, explore new program design opportunities, and systems and program coordination to ensure alignment and system building to increase access to high quality early learning programming for low-income 3- and 4-year-olds. As we continue to evolve, First 5 plans to look at integration opportunities with Oakland Promise.

### DUE DILIGENCE IN THE POLITICAL & RESOURCE CONTEXT

- For FY 2024-25, we identified strengths to build upon and challenges to address for the overall system and each partner agency (see [Appendix E: OCI Public Partners Planning Takeaways And Future Considerations](#)) to support the needs of Oakland families and the early care and education system.
- First 5 conducted four Community Listening Sessions in Spring 2025 to identify priorities for Oakland and the local ECE system (attended by approximately 123 unique individuals).
- First 5 facilitated the establishment of shared vision and values with the public systems partners

These inputs, along with financial and programmatic data, informed our analysis of the FY 2025-26 budget requests as we took into consideration how each partner agency's investments leverage their strengths, enhance programs, and address identified system challenges.

## **ASSESSING CAPACITY TO SPEND, CONTINUOUS MONITORING & REFINING MULTI-YEAR PLANNING**

In alignment with OCI legislation mandates, First 5 brokered an agreement with the two priority public agencies to define capacity as the "capacity to spend in the current years and in future years."<sup>16</sup> In FY 2023-24, First 5 established "base funding" for each entity and the preliminary planning allocations through FY 2026-27 that represent the funding needed to achieve targeted outcomes that increase the number of children served, improve educational experiences for the youngest learners, and recruit and support educators in OUSD and COOHS.

First 5 also negotiated multi-year contracts with OUSD and COOHS to create a level of stability that affords system building and multi-year planning through the alignment of budgets with historic spending, availability of revenue, and annually updated program plans.

- **OUSD:** The multi-year contract with OUSD was executed in June 2024 and, as part of our due diligence, First 5 is closely monitored FY 2024-25 expenditures to assess any underspending and analyzed performance metrics to inform their enclosed FY 2025-26 program plan and budget analysis and recommendations.
- **COOHS:** The multi-year contract with COOHS is expected to be executed in Spring 2025 following nearly a year of dialogue and consistent with guidance provided by the City Administrator to maintain the program's funding at the baseline level.<sup>17</sup> COOHS's FY 2024-25 Program Plan and Budget is the foundation for their FY 2025-26 proposal and multi-year contract as they have communicated their intent to submit a maintenance of effort budget. Please see [Appendix H1. First 5 Memo to the City of Oakland re: Oakland Children's Initiative Program & Budget, City of Oakland Head Start FY 2024-25, April 2025.](#)

## **COMMUNITY ENGAGEMENT TO INFORM ONGOING PLANNING & IMPLEMENTATION**

In FY 2024-25, First 5 contracted with West Ed to conduct four Community Listening Sessions related to OCI, and six more specific to Measure C, and to produce a series of reports informing early childhood investments and systems building (See the [Appendix H2. Oakland Children's Initiative Community Listening Sessions Key Themes and Recommendations report, West Ed April 2025](#) for more detail on the listening sessions). The Listening Session objectives included:

1. **Inform continued program investments** by priority public systems partners for the remaining three years of the initial five-year contracts.
2. **Inform early care and education systems building in the City of Oakland**, including systems integration with Measure C and the broader mixed delivery system and, as mandated by the legislation, the coordination and leveraging of funding streams from federal, state, and local sources in furtherance of the initiative's goals.



3. **Gather community priorities to inform recommended updates to OCI Early Education Fund 5-Year Guidelines and Additional Requirements**, including those impacting enrollment such as age targets, outreach, classroom experiences, hours of operation, inclusion support, and family support.

## FIRST 5 INVESTMENT SUMMARY

| Expense                            | FY 22-23 Actual  | FY 23-24 Actual    | FY 24-25 Budget    | FY 25-26 Budget    | Change from FY 24-25 Budget |            | Planning Budget    |
|------------------------------------|------------------|--------------------|--------------------|--------------------|-----------------------------|------------|--------------------|
|                                    |                  |                    |                    |                    | Amount                      | %          | FY 26-27 Budget    |
| Personnel                          | \$320,265        | \$1,195,881        | -                  | -                  | -                           | 0%         | -                  |
| Program Contracts                  | \$84,140         | \$161,532          | \$520,650          | \$408,000          | (\$112,650)                 | -22%       | \$408,000          |
| Operating                          | \$2,525          | \$4,721            | \$43,000           | \$55,000           | \$12,000                    | 28%        | \$55,000           |
| Administrative Costs <sup>18</sup> | \$478,273        | \$2,276,650        | \$3,249,142        | \$4,049,555        | \$800,413                   | 25%        | \$3,492,035        |
| <b>TOTAL</b>                       | <b>\$885,203</b> | <b>\$3,638,784</b> | <b>\$3,812,792</b> | <b>\$4,512,555</b> | <b>\$699,763</b>            | <b>18%</b> | <b>\$3,955,035</b> |
| Total FTE                          | 4.5              | 5.6                | 0                  | 0                  | 0                           | 0%         | 0                  |

## FIRST 5 PROGRAM SUMMARY

First 5's FY 2025-26 investments reflect a strategic focus on strengthening the early childhood system, centering children, families, and communities, and building a sustainable infrastructure to advance equity. Key investments focus on strengthening ECE system infrastructure, supporting compliance, data, community engagement, and operations, while centering families through targeted fatherhood initiatives, and leveraging diverse funding sources for greater impact.

| Vision   | Key Themes  | Investment Highlights  |
|--|---|--|
| <b>Partner to Strengthen ECE System \$4.5M</b> | <b>Compliance &amp; Data \$168K</b>               | Continue investing in legal consultation related to ordinance, contracting, and data sharing. Support shared audit costs to ensure fiscal compliance. Data infrastructure will support reporting, measurement, and accountability to equity goals.   |
|  | <b>Planning &amp; Community Engagement \$170K</b> | Continue to invest in planning and community engagement to support coordinated system development.   |
|  | <b>Operations \$55K</b>                           | Materials, community engagement (translation, food, etc.), equipment, travel for site visits, and meetings.  |
|  | <b>Administrative Fee \$4.05M</b>                 | The complexity of First 5's intermediary role for OCI requires significant time and resources. To support effectiveness and capacity, First 5 is charging 15% of the overall Early Education Fund non-capital budget and 3% of the capital budget as an administrative fee. Given the scale and nature of capital expenditures, applying a lower 3% fee reflects First 5's administrative effort involved while not excessively drawing funds for one time capital projects. |

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| <b>Child, Family, Community Centered \$70K</b> | <b>Fatherhood \$70K</b>  | Fatherhood training and consulting to support OUSD and COOHS in staff training and implement Fatherhood engagement programs to increase overall Family Engagement and ensure an inclusive environment for fathers. |
| <b>Leveraging Resources \$61.2M</b>            | Funding includes Proposition 10 tax proceeds, Measure C tax proceeds, First 5 California IMPACT Grant, Alameda County Health, QRIS Block Grant (ACOE), Quality Counts California (DSS), AC Public Health Dept., Alameda County Social Services Agency, Sunlight Foundation, Alameda Alliance for Health, Hellman Foundation, Kaiser Permanente, Child Family & Community Services, Heising Simons Foundation, and the Kresge Foundation. |  |

## FIRST 5'S TAKEAWAYS & FUTURE CONSIDERATIONS FOR THE EARLY EDUCATION SYSTEM

First 5 is guiding our partnership with the public systems and OCI implementation with an eye toward broader alignment with Measure C, UTK, and mixed delivery systems.

| First 5 Systems Takeaway   | Strengths and Accomplishments to Build Upon  | Considerations for Future Planning  |
|--|--|---|
| <b>Systems Leadership</b><br>Acts as backbone agency for the OCI Early Education Fund with responsibilities spanning fiscal management and public partner convening and coordination.                                    | Convened OUSD, COOHS leadership, and OCI Accountability Officer for a series of visioning and design retreats based on the strengths and considerations from FY 24-25. The priorities from the retreats informed the FY25-26 program design and budgets submitted by the public systems partners. Secured consultant, School Readiness Consulting, to support the City of Oakland and OUSD to collaborate on a long-term vision and structure for OCI. | Use findings from Community Listening Sessions and WestEd report to support program, finance, and system coordination to address community-identified recommendations. Track local, state, and federal policy and budget developments and engage new City and OUSD leadership in systems planning for OCI.  |
| <b>Continuous Fiscal Monitoring</b><br>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. | Elevated concerns and successfully worked with the Oakland City Administrator to seek approval for COOHS FY24-25 and FY25-26 program plan and budget.  | Continue to closely monitor capacity, investments across categories, timely use of funds, year over year spending, and impact in terms of children served, to ensure the funding meets the intended goals of the taxpayer funded initiative. Track budget and potential declining general fund commitment and resulting needed increases in OCI to maintain current capacity. |
| <b>Community Engagement</b><br>Leveraging community relationships and Measure C planning to inform OCI investments.  | Designed and hosted four OCI-specific Community Listening Sessions to gather input and community priorities to inform continued program investments, systems integration, and the OCI 5-year guidelines, resulting in an OCI-specific report from West Ed.   | Use findings from listening sessions and West Ed's OCI report to support Accountability Officer with planning for any refinement of the 5-Year Guidelines   |

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| <b>Cross-Sector Integration</b><br>Lead coordination of aligned funding (e.g., Measure C, Prop 10) to support early childhood initiatives. | Solicited and funded a systems-analysis report from West Ed to outline the opportunities for systems impact with coordination of Measure C and OCI.  | Continue to seek opportunities to align OCI and Measure C investments as Measure C 5-year plan is finalized and implemented.  |
| <b>Data, Evaluation &amp; Accountability</b>   | Secured the same OCI evaluator (AIR) via a piggyback on the City's procurement process to ensure integration with Measure C. Established MOUs with public systems partners for data sharing to demonstrate impact of OCI investments, includes disaggregated individual level data to allow for equity analysis of beneficiaries demographically and geographically. | Work with OCI Accountability Officer and systems partners to address the limitations of the Results Based Accountability (RBA) measures to tell the full and nuanced story of OCI's impact. Incorporate financial and programmatic data into the story of impact; leverage existing data to inform and prioritize investments (e.g., kindergarten readiness study EDI instrument, COOHS parent survey). |
| <b>Administration</b><br>Streamline processes, coordinate across systems including use of technology.                                      | Successfully established multi-year contracts with both public systems partners to stabilize the systems and provide continuity of investments.  | Add focus on shared services, cross-system technology, and administrative streamlining.   |

# APPENDICES

## APPENDIX A: SHARED VISION & VALUES FOR OAKLAND'S ECE SYSTEM

In July 2024 and August 2024, First 5 hosted Joint Public Systems Partners Leadership Visioning Retreats and facilitated a process with the priority public systems partners—Oakland Unified School District (OUSD) and City of Oakland Head Start (COOHS)—and the OCI Accountability Officer to identify shared vision and values for the early education system in Oakland. These shared vision and values have guided the development of the FY 2025-26 Program Plan and Budget, as well as First 5's analysis and recommendations.

### OUR SHARED VISION

Our vision is to cultivate an equitable, inclusive, and transformative early childhood education system in Oakland by ensuring every child has access to and can engage in high-quality, supportive learning experiences that lay the foundation for lifelong success. By investing in our children and families, we strengthen Oakland's local economy and help shape a vibrant future for our community.

### MAXIMIZE ACCESS & ENROLLMENT

Collaborate with educators, families, and the community to fill every seat in early childhood programs. Provide families with access to affordable, high-quality, culturally appropriate early care and education that supports children's lifelong learning and well-being and strengthens family financial stability.

### EQUITABLE & NURTURING ENVIRONMENT

Provide high-quality, safe, and nurturing learning environments that address inequities, promote inclusion, and support the unique needs of each child. These environments will foster the interpersonal and developmental skills children need to thrive.

### CHILD, FAMILY & COMMUNITY-CENTERED

Center the priorities, assets, and needs of children and families, amplify diverse voices, and support holistic child development in system design and implementation. Strengthen partnerships with families, educators, the private sector, and the broader community to eliminate enrollment barriers, provide a range of options that meet the diverse needs of families, and invest in the long-term well-being of Oakland's children.

### PARTNER TO STRENGTHEN AN EARLY CHILDHOOD SYSTEM

Collaborate across sectors to build a comprehensive early childhood system that serves as a bedrock for the success of Oakland's children. Identify ways to grow and adequately compensate the educator workforce to maximize enrollment and fill all available seats in early childhood programs. Maximize funding sources and streamline program operations to ensure every child can participate in and benefit from early education.

## APPENDIX B: OCI ORDINANCE MANDATES & GOALS

### FIRST 5'S MANDATED ROLE (1605(d)), PROGRESS & ACCOMPLISHMENTS IN MEETING OCI GOALS (1606(a))

The following tables outline the OCI ordinance mandates for the Early Education Implementation Partner and the ordinance goals for the first five years and crosswalk key activities to date and planned activities to comply with OCI mandates and achieve the ordinance goals.

#### SECTION 1605(d). REQUIREMENTS FOR THE EARLY EDUCATION IMPLEMENTATION PARTNER

The City Administrator shall have the authority to enter into a contract with the Implementation Partner that includes legally required terms and terms deemed to be in furtherance of the Purpose and Intent of this Act, such as but not limited to the following:

| Early Education Implementation Partner Requirement   | First 5 Activities to Date  | First 5 Planned Activities in FY25-26   |
|--|---|---|
| <b>1605(d)(1)</b><br>Performance metrics and benchmarks  | <ul style="list-style-type: none"> <li>• Collaborated with COOHS, OUSD, and the OCI Accountability Officer to define the Results Based Accountability (RBA) metrics to measure success (see below)</li> <li>• Worked with OUSD to define targets for the RBA metrics</li> </ul>   | <ul style="list-style-type: none"> <li>• Work with COOHS, OUSD, and the OCI Accountability Officer to refine RBA metrics to fully reflect the full story of OCI investments</li> <li>• Work with COOHS to define COOHS's targets for the RBA metrics</li> <li>• Enhance technology, financial, and data systems, reporting and analysis to improve service coordination and continue documenting OCI's impact on Oakland's children, families, and communities</li> </ul> |
| <b>1605(d)(2)</b><br>Plans for consultation or engagement with experts, community members, and program beneficiaries | <ul style="list-style-type: none"> <li>• Established the Joint Public Systems Partners Leadership Table to support leadership buy-in and improve alignment, establishing a shared vision and values to guide the work of a coordinated system</li> <li>• Established regular Working Group meetings with each public partner to support program planning and design</li> <li>• Hosted a series of Community Listening Sessions facilitated by WestEd to receive input and feedback from families, caregivers, providers, and community members throughout the City of Oakland (approximately 123 unique individuals attended the series).</li> <li>• Provided informational presentations to raise awareness with key community partner organizations in Oakland. Partner organizations included Parent Voices Oakland, the Oakland Chamber of Commerce, Oakland Family Resources Center Network, and Oakland Starting Smart and Strong.</li> </ul> | <ul style="list-style-type: none"> <li>• Engage School Readiness Consulting (SRC <u>Scope of Work</u>) to support a facilitated process with City and OUSD leaders to align strategic direction and investment in the early child care and education system</li> </ul>  |

|  |   |   |
|--|---|---|
| <b>1605(d)(3)</b><br>Annual independent financial audits   | <ul style="list-style-type: none"> <li>Leveraged First 5's existing contract with Eide Bailly LLP, who conduct the First 5 agency-wide independent financial audit, to conduct the OCI annual independent financial audits.</li> </ul>  | <ul style="list-style-type: none"> <li>Continue to leverage First 5's existing contracts with Eide Bailly LLP to conduct the OCI annual financial audits.</li> </ul>  |
| <b>1605(d)(4)</b><br>Data sharing agreements including disaggregation by race and income of program beneficiaries  | <ul style="list-style-type: none"> <li>Established multi-year contracts and updated Data Sharing Agreements (DSA) with OUSD and COOHS, supporting robust performance evaluation, integration with Alameda County's Measure C, and tracking progress toward the five-year OCI Early Education Fund Guidelines. This alignment will allow COOHS to report on the total number of children served for the first time.</li> <li>Built the administrative capacity of the public systems to meet the reporting, data, community engagement, and financial accountability mandates</li> </ul> | <ul style="list-style-type: none"> <li>Continue to implement and refine DSAs as needed to support data-driven decision making</li> </ul>  |
| <b>1605(d)(5)</b><br>Accounting practices that securely segregate Fund revenues and expenditures to ensure appropriate accounting of receipts and expenditures | <ul style="list-style-type: none"> <li>Ensured a financial system that provides for ease of disbursements and implementation of the funds.</li> <li>Differentiated annual ongoing expenses from one-time budgeted expenses.</li> <li>Reported on actuals and numbers served.</li> <li>Set up separate Chart of Accounts and Financial Entities to ensure separate tracking of the accounting transactions.</li> <li>Performed account reconciliation on a regular basis to ensure the accuracy and integrity of financial records.</li> </ul>   | <ul style="list-style-type: none"> <li>Continue to produce quarterly financial reports</li> <li>Continue to work with the Oakland City Administrator to strengthen OCI fiscal management, reporting, and oversight practices</li> </ul> |

## SECTION 1606. THE FIRST FIVE YEARS OF THE EARLY EDUCATION FUND

The following table outlines ordinance goals for the initial five-year period of implementing OCI. The public partners often refer to the goals outlined in Section 1606 as:

- Goals 1a/b
- Goal 2
- Goal 4
- Goals 1c/d
- Goal 3
- Goal 5
- Goal 1e

### Section 1606(a). Early Education Guidelines for the First 5 Years

For the first five (5) years following the appointment of a quorum of the Citizens' Oversight Commission, in order to expedite implementation and ensure the people of Oakland begin to feel the benefit of the approval of the Act, the Guidelines for the Early Education Fund, which are based upon an assessment of the local context and needs and national evidence-based best practices in the field, shall be as follows and shall not be amended:



| Early Education Fund Guidelines   | Activities to Date  | Planned Activities in FY 25-26  |
|---|---|---|
| <p><b>Section 1606(a)(1).</b><br/>Increase overall attainment and reduce socioeconomic and/or other demographic disparities, in child educational outcomes, such as kinder-readiness, and provide family support services, to achieve the following outcomes prioritized as follows, such that plans to fund a lower priority outcome may only be implemented if the Early Education Implementation Partner has determined that the next highest priority goal is reasonably achievable within the five-year period:</p> <ol style="list-style-type: none"> <li>1. Make available free or affordable and high-quality early education and/or preschool for four-year old children from low-income families, such as those who make less than eighty-five-percent (85%) of the state median income, with a priority on serving the children of families with the lowest incomes and/or those who are in high need, while also supporting such families who need family, friend, and neighbor care.</li> <li>2. Increase the availability of free or affordable and high-quality early education and/or preschool for three-year-old children from low-income families, with a priority on serving the children of families with the lowest incomes or those who are in high need, while also supporting such families who need family, friend, and neighbor care.</li> <li>3. Increase the affordability and/or quality of preschool for all four-year-old children, with a priority on serving the children of families with the lowest incomes or those in highest need, while also supporting such families who need family, friend and neighbor care.</li> <li>4. Increase the affordability and/or quality of preschool for three-year-old children, with a priority on serving the children of families with the lowest incomes or those in highest need, while also supporting such families who need family, friend and neighbor care.</li> <li>5. Increase the availability and/or quality of child development support services for children and families from low-income backgrounds with children from birth through age three, while also supporting such families who need family, friend, and neighbor care.</li> </ol> | <p><b>OUSD</b></p> <ul style="list-style-type: none"> <li>• Served 1,345 3- and 4-year-olds in low-income families in FY 2022-23 and 1,643 in FY 2023-24 (22% increase)</li> <li>• Funded 27 direct staff (e.g., Early Learning Coaches) to expand direct services to students and families, including: <ul style="list-style-type: none"> <li>◦ 9 Family Navigators to strengthen family engagement and connections to wraparound services</li> </ul> </li> <li>• Invested \$4.3 million in facility improvements at the Kaiser Child Development Center to create high-quality, age-appropriate learning and play spaces (i.e., playground and accessibility upgrades), serving up to 150 students</li> <li>• Supported OUSD's expansion of Multi-Tiered Systems of Supports to ensure children and their families receive the resources they need</li> <li>• Improved technological infrastructure and data systems in OUSD (Aeries and Enrollwise) to align cross-agency enrollment and reporting tools between PK/TK and K12 enrollment systems</li> </ul> <p><b>COOHS</b></p> <ul style="list-style-type: none"> <li>• Fully funded 3 COOHS sites - Tassafaronga, Arroyo Viejo, and Franklin. These sites were at risk of closure due to federal funding reductions made in 2022. OCI has provided this necessary funding to ensure the sites remain open and fully operational since 2023. <ul style="list-style-type: none"> <li>◦ Served 23 3- and 4-year-olds in low-income families in FY 2022-23 and 13 in FY 2023-24 (43% decrease) at these three sites</li> </ul> </li> <li>• Funded 29 staff who work directly with children and families (e.g., Center directors, educators, cooks) adjusted from FY23-24 budget to expand direct services to students and families, including: <ul style="list-style-type: none"> <li>◦ Two Family Services Specialists to strengthen family engagement and connections to wraparound services</li> </ul> </li> </ul> <p><b>Cross-Partner</b></p> <ul style="list-style-type: none"> <li>• Invested in equity-focused outreach efforts, such as targeted transition services and home visiting programming to families furthest from opportunity (e.g., refugee and newcomer status and/or unhoused families)</li> </ul> <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>• Worked with public systems partners to develop a program and budget plan that demonstrates how the funding will meet the ordinance mandates.</li> <li>• Began planning for expansion investments to the mixed delivery system to close the service gap</li> </ul> | <p><b>OUSD</b></p> <ul style="list-style-type: none"> <li>• Provide classroom and staffing support for new ECE classrooms (3 PK, 7 TK)</li> <li>• Expand classroom capacity by funding 45 early literacy tutors</li> <li>• Invest in construction of 6 new classrooms at the Washington Early Childhood Center (serving up to 144 children)</li> <li>• Invest in planning work for 7 new classrooms at Garfield Elementary School (serving up to 168 children)</li> <li>• Expand partnerships with onsite mental health service providers at 9 PK and 10 TK sites, serving up to 1,200 children</li> </ul> <p><b>COOHS</b></p> <ul style="list-style-type: none"> <li>• Invest in renovations for two classrooms at a new West Oakland site at Bethlehem Elementary Lutheran Church, serving up to 24 children.</li> </ul> <p><b>Cross-Partner</b></p> <ul style="list-style-type: none"> <li>• Invest in ECE facilities maintenance and upgrades to create safe and accessible spaces for children to learn and grow</li> <li>• Continue collaborating with public systems partners to explore options and vision for before and after school programs</li> </ul> <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>• Continue to work with partners to develop program plans and budgets that meet the Early Education Fund guidelines.</li> </ul> |

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| <p><b>Section 1606(a)(2).</b><br/>Provide for a rigorous external evaluation of the impact of the early education programs, such as on child outcomes data including kindergarten-readiness, that will facilitate assessment of whether the early education programs are achieving the goals of the Act and provide information on how to mitigate disparities, such as those by wealth and income or for children in high-need.</p>  | <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>• Participated in the OCI Accountability Officer's ad hoc evaluation committee to inform the development of principles to guide the evaluation, as well as development of the Request for Proposal for an external evaluator to conduct the evaluation.</li> <li>• Used a piggyback with the City's contracted evaluator (AIR) to procure the same firm for the Measure C evaluation to support system coordination</li> <li>• Hired Hatchuel Tabernik and Associates (HTA) to document First 5's role in the initial implementation and administration of the Early Education Fund and produce an <u>Implementation Process Review</u></li> <li>• Facilitated a countywide process to adopt a single, common policy-oriented tool to conduct the First 5-sponsored kindergarten readiness study. At the completion of the process, school districts unanimously and enthusiastically selected the Early Development Instrument (EDI), a nationally and internally validated population-based measure that provides a community-level measure reflecting a snapshot of children's health, development, and school readiness.</li> </ul>        | <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>• Conduct the First 5-sponsored Kindergarten Readiness Community Study in the 2025-2026 school year.</li> <li>• Work with AIR to begin Measure C evaluation, establish framework that supports system integration between OCI and C</li> </ul>   |
| <p><b>Section 1606(a)(3).</b><br/>Ensure that professional development and coaching are generally available for educators, and that participating center-based preschool programs generally are able to do the following within a reasonable timeframe:</p> <ul style="list-style-type: none"> <li>• (A) Achieve a baseline rating of at least three (3) or higher on the regional Quality Rating and Improvement System (QRIS), or a successor system;</li> <li>• (B) Utilize a developmentally-appropriate curriculum aligned with California Department of Education standards, and in addition that is also evidence-based and/or has demonstrated success in improving preparation for kindergarten;</li> <li>• (C) Conduct formative assessments to shape instruction; and</li> <li>• (D) Participate in valid, regular, and reliable assessments of early education quality in order to foster continuous improvement and to reduce disparities, such as those by income and wealth, in child outcomes.</li> </ul> | <p><b>OUSD</b></p> <ul style="list-style-type: none"> <li>• Implemented Creative Curriculum—and invested in significant professional development opportunities in 2023-24 to support teaching staff understand and implement a project-based curriculum approach that aims at meeting children's individual needs.</li> <li>• Established trauma-informed practices to create responsive early learning environments that support child resiliency</li> <li>• Teaching Pyramid -- to support children's socio-emotional development</li> <li>• Focus on Mindfulness to create strength-based early learning environments</li> </ul> <p><b>COOHS</b></p> <ul style="list-style-type: none"> <li>• Invested in PD opportunities for teaching staff to participate and implement Creative Curriculum practices.</li> </ul> <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>• Continued ongoing coordination with local Resource &amp; Referral agencies and internal First 5 coaching and training teams to support systems partners' Quality Improvement efforts. At this time all sites are meeting ordinance compliance standards for QRIS, professional development, and training.</li> </ul> | <p><b>OUSD</b></p> <ul style="list-style-type: none"> <li>• Invest in eight dual-enrollment high school apprentices to earn credentials in early childhood education</li> </ul> <p><b>COOHS</b></p> <ul style="list-style-type: none"> <li>• Invest in workforce pathways for the annual cohort of 18 apprentices to earn credentials in early childhood education</li> </ul> <p><b>Cross-Partner</b></p> <ul style="list-style-type: none"> <li>• Continue to invest in additional professional development and coaching opportunities</li> <li>• Enhance professional development and other supports to strengthen the early education workforce to promote high-quality learning environments and inclusive teaching practices</li> </ul> <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>• Continue First 5's ongoing ECE system-wide work to provide support to meet quality standards</li> </ul> |

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| <p><b>Section 1606(a)(4).</b><br/>Ensure that funding streams from federal, state and local sources, including Head Start, are coordinated to reduce the administrative burden of program beneficiaries in accessing services, and to ensure that existing high-quality early education programs are not made financially unviable.</p>  | <p><b>Cross-Partner</b></p> <ul style="list-style-type: none"> <li>Leveraged funding streams and relationships in the ECE system <ul style="list-style-type: none"> <li>While partners have been coordinating funding streams since OCI began, the previous Program Plan and Budget proposal templates did not require reporting on leveraged funds</li> </ul> </li> </ul> <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>Leveraged funding streams First 5 is actively coordinating (approximately \$30M annually): <ul style="list-style-type: none"> <li>Prop. 10</li> <li>CalWORKs</li> <li>CSPP Block Grant</li> <li>QCC Block Grant</li> <li>Alameda County Social Services Agency</li> <li>Alameda Alliance for Health</li> <li>Medicaid Administrative Activities</li> <li>Disability Prevention Program</li> </ul> </li> <li>Leveraged First 5's existing relationships in the ECE system, including partnerships with: <ul style="list-style-type: none"> <li>California Department of Social Services</li> <li>California Department of Education</li> <li>Oakland Thrives Leadership Council/Joint Powers Authority (JPA)</li> <li>Alameda County Fathers Corps (led by First 5)</li> </ul> </li> <li>Began developing a centralized eligibility and enrollment system, and a data warehouse to capture and understand impact of system-wide investments in young children and families.</li> </ul> | <p><b>Cross-Partner</b></p> <ul style="list-style-type: none"> <li>Outline leveraged funding sources for all OUSD, COOHS, and First 5 in future program plans, budgets, and reports</li> </ul> <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>Continue to identify and track opportunities for leveraging First 5's programming to enhance OCI investments and build a more coordinated early care and education system in Oakland. First 5 anticipates to leverage and coordinate OCI funds with the implementation of Measure C.</li> </ul>  |
| <p><b>Section 1606(a)(5).</b><br/>Give priority consideration to expanding higher quality programs and/or facilities for children who are in the highest need, from the lowest-income backgrounds, live in areas of high unmet early education need, and/or who are traditionally underserved, as resources allow, which could include enhanced services, such as bilingual or dual-language instruction, supports to enhance cultural competency, or a higher rating on the QRIS or a successor system.</p> | <p><b>Cross-Partner</b></p> <ul style="list-style-type: none"> <li>Identified equity principles above and beyond the mandates—including geographic, race/ethnicity, newcomer status, language, ability, neurodiversity, etc.—to inform investments</li> </ul> <p><b>First 5</b><br/>Adopted an Equity Statement and Principles (First 5 Commission adopted in June 2023: see pages 20-21 of the <a href="#">First 5 Alameda County Strategic Plan 2022-2027</a>)</p>  | <p><b>Cross-Partner</b></p> <ul style="list-style-type: none"> <li>Expand language supports, culturally and linguistically responsive programming, and family leadership opportunities across the early childhood system in Oakland (including delivering coaching to educators on how to support multilingual learners and inclusive teaching practices, connecting children and families to wraparound services, and conducting outreach to hard-to-reach families)</li> <li>Continue to apply each partner's equity principles and use data to drive decision making and investment priorities</li> </ul> <p><b>First 5</b></p> <ul style="list-style-type: none"> <li>Use disaggregated data to measure performance and inform investments with an equity focus</li> </ul> |

## INVESTMENT STRATEGIES & MEASURING SUCCESS

The following tables outline the partner-agreed-upon RBA metrics, which are used to demonstrate how OCI investments meet the legislative requirements and the program plan and budget strategies that guide development of program plan and budget proposals.

### RBA MEASURES

|                       |                |  |
|-----------------------|----------------|--|
| How Much?             | Affordability  |  |
|                       | 1              | Number of free and subsidized slots by program type  |
|                       | Access         |  |
|                       | 2              | Number of children enrolled in priority partner sites (OUSD & COOHS)   |
|                       | 3              | Number of ECE educators and staff  |
|                       | 4              | Additional capacity from OCI funded capital infrastructure improvements  |
|                       | Quality        |  |
|                       | 5              | Number and percentage of sites receiving OCI funded capital infrastructure improvements                                      |
| How Well?             | Access         |  |
|                       | 7              | Percent of free and subsidized slots enrolled (uptake)   |
|                       | Quality        |  |
|                       | 8              | Quality  |
| Is Anyone Better Off? | 9              | Retention rate for ECE educators and staff   |
|                       | Access/Quality |  |
|                       | 10             | Number and percentage of children enrolled in an improved ECE facility due to OCI funded capital infrastructure improvements |
|                       | 11             | Percentage of OCI sites with a quality rating above standard   |

### EARLY EDUCATION GOALS (SEC. 1606A) & STRATEGY DEFINITIONS DEVELOPED BY FIRST 5

| 1606a Goal # and Strategy                  | Definitions  |
|--|--|
| 1a/1b Family fees                          | <b>Family fees:</b> Reduce costs for families of 4-years-olds (a), 3-year-olds (b) by offsetting family fees.  |
| 1a/1b Build or preserve child spaces       | <b>Build or preserve child spaces:</b> Infrastructure construction, retrofitting projects, or health/safety improvements in classrooms, yards, buildings to enable access for early care and education programming for low-income 4-year-olds (a), 3-year-olds (b) |
| 1a/1b Program development and coordination | <b>Program development and coordination:</b> Coordination, support, staffing related to program development related to 4-year-olds (a), 3-year-olds (b)  |
| 1a/1b Enrollment                           | <b>Enrollment:</b> Increase demand for ECE programming through family outreach and information campaigns, enrollment processes, and communication of array of care options for low-income 4-year-olds (a), 3-year-olds (b).  |

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| <b>1a/1b. Hire and retain early learning educators</b>                          | <b>Hire and retain early learning educators:</b> Increased staffing to support additional access to quality early care and education for low-income 4-year-olds (a), 3-year-olds (b)  |
| <b>1c/1d. Curriculum, materials, and resources</b>                              | <b>Curriculum, materials, and resources:</b> Classroom materials and resources for improved quality for 4-year-olds (c), 3-year-olds (d) from low-income families   |
| <b>1c/1d. Enhancement of child spaces</b>                                       | <b>Enhancement of child spaces:</b> Renovation, enhancements, or minor improvements of early learning environments for improved quality for 4-year-olds (c), 3-year-olds (d) from low-income families   |
| <b>1c/1d. In-class supplemental, specialized support staff and/or resources</b> | <b>In-class supplemental, specialized support staff and/or resources</b> (e.g., MTSS, Special Ed aids) for improved quality for 4-year-olds (c), 3-year-olds (d) from low-income families   |
| <b>1c/1d. Routine maintenance or upkeep related to child spaces</b>             | <b>Routine maintenance or upkeep related to child spaces:</b> Maintenance projects, ongoing utilities, rent for improved quality for 4-year-olds (c), 3-year-olds (d) from low-income families  |
| <b>1c/1d. Wraparound supports</b>   | <b>Wraparound supports</b> such as screenings, case management, family engagement, etc. for improved quality for 4-year-olds (c), 3-year-olds (d) from low-income families  |
| <b>1e. Reduction of family costs</b>  | <b>Reduction of family costs</b> associated with child care for children under 3  |
| <b>1e. Child spaces</b>   | Increased number, enhancement, or maintenance of child spaces for children under 3  |
| <b>1e. Enrollment</b>   | <b>Enrollment:</b> Increase demand for ECE programming through family outreach and information campaigns, enrollment processes, and communication of array of care options for children under 3.  |
|   | Hire and retain early learning educators of children under 3.   |
| <b>1e. Program development, coordination, and supplemental support</b>          | <b>Program development, coordination, and supplemental support,</b> including curriculum, materials, resources, staff, etc. for children under 3  |
| <b>1e. Wraparound supports</b>  | <b>Wraparound supports</b> such as screenings, case management, family engagement, etc. for children under 3  |
| <b>2. Rigorous Evaluation</b>   | Data System enhancement and data collection such as increasing the effectiveness in data collection and reporting   |
| <b>3. Professional Development</b>  | <b>Professional Development:</b> Host, expand, or contract early learning professional development opportunities and trainings (e.g., trauma-informed care, strategies for supporting dual language learners, staff wellness, enhancing experiences for Black boys, etc.) |
| <b>3. Coaching</b>  | <b>Coaching</b> activities and related expenses   |
| <b>3. Assessment</b>  | <b>Assessment</b> activities and related expenses   |
| <b>3. QRIS Rating</b>   | <b>QRIS Rating</b> activities and related expenses  |
| <b>4. Administrative operational capacity/leveraging funding</b>                | Administrative operational capacity through infrastructure staffing, technology business processes, data sharing agreements, or coordinating funding streams  |
| <b>5. Intensive, targeted family outreach, engagement, and support</b>          | Intensive, targeted family outreach, engagement, and support  |
| <b>5. Transition support services</b>   | Transition support services for 4-year-olds and 3-year-olds   |

## APPENDIX C: PUBLIC PARTNER EARLY EDUCATION PRIORITIES

### OAKLAND UNIFIED SCHOOL DISTRICT (OUSD) EARLY LEARNING PRIORITIES

#### **Expand opportunities for quality early learning to more of Oakland's children and families with a focus on those furthest from opportunity**

Through combined recruitment and expansion efforts, OUSD plans to be able to offer more quality programming to Oakland's 3-4-year-olds. They will focus efforts on serving children whose families make less than 85% of the median income. Ninety-eight percent of students in OUSD's California State Preschool programs fall into this category. OUSD believes that access to quality preschool is an important factor in disrupting the Opportunity Gap and improving long term outcomes for students furthest from opportunity. If more of Oakland's students enter kindergarten with the academic and socio-emotional prerequisites necessary to access a rigorous kindergarten educational program, we will see increased success.

#### **Increase Family Engagement**

OUSD plans to increase the sense of belonging that families feel in their PK and TK classes by expanding opportunities for authentic family engagement and developing family capacity to advocate for their students in a school setting. OUSD believes that families are crucial to student success and that the more our families feel a true sense of belonging and ownership in their children's schooling, the more successful their students will be.

#### **Improve quality in all OUSD Early Learning Environments**

As OUSD has a long-term goal of all students reading at grade level by grade 3, they are aligning their early education goals and focusing on early literacy instruction through a rigorous PD and coaching plan. OUSD will continue to work on ensuring quality early learning environments so that this learning can take place. Access to PK programming will only change long term outcomes if the programs are high quality.

#### **Ensure that all of the 4 year olds who graduate from PK or TK are ready for Kindergarten**

The goal of OUSD PK programming is that all graduates are ready for kindergarten. To ensure that all students are ready for Kindergarten, OUSD will implement SEEDS tools and strategies in all classrooms. OUSD will use Desired Results Developmental Profile (DRDP) assessment tool and Early Literacy Assessments to monitor every child's academic readiness for kindergarten and to support all children to meet the targets.

#### **Expand Multi-Tiered System of Supports (MTSS) services and improve systems to ensure all students are getting the supports and services they need**

We know that different students need different supports to succeed. MTSS allows OUSD to define what they need to ensure for EVERY child in EVERY class has the support for kindergarten readiness in terms of academics, behavior, socio-emotional supports, and family supports. It is a framework to identify which students need additional supports and for getting those supports to them in an equitable and efficient way. The MTSS framework allows OUSD to focus additional resources where they are most needed while ensuring that every child has access to a strong foundation in all domains.

#### **Expand Inclusive Services**

Over the past five years, there has been a rapid increase in the number of 3- and -4-year-olds in Oakland who qualify for special education services. There is a mandate from the state (and from OUSD's own values) that children with Individualized Education Plans (IEPs) be served in "the least restrictive environment". This means that more and more students with special needs need placements in Gen Ed classrooms. It is OUSD's goal that every child can be fully served in a PK/TK classroom close to their home and that their families feel good about. In order to do this, OUSD needs to expand the capacity of our ECE staff to welcome and serve children with diverse needs

#### **Improve alignment and connection within Early Learning Department & throughout OUSD**

TK in California has expanded rapidly and OUSD is now serving 4-year-olds on every elementary school campus. Many elementary school leaders have had no training in ECE and do not understand developmentally appropriate practices. Through a partnership with the Alameda County Office of Education (ACOE), the Director of Kindergarten Readiness, and ongoing PD, OUSD plans to train elementary leaders in Developmentally Appropriate Practice as well as in a full understanding of California's Pre-Transitional Kindergarten Learning Framework (PTKLF). It is critical that TK classrooms incorporate developmentally appropriate practices and set up their classrooms in accordance with best practices for 4-year-olds rather than "Kindergarten Lite."



## CITY OF OAKLAND OFFICE OF HEAD START (COOHS) EARLY LEARNING PRIORITIES

### Workforce Development & Retention

To advance high-quality early learning programming, it is essential to hire highly qualified teaching staff who bring expertise, passion, and a deep understanding of child development. Ensuring the retention of these educators requires a strong commitment to their ongoing growth through professional development opportunities and pathways for educational advancement. By investing in the continuous learning and career progression of early childhood educators, programs can maintain a stable, skilled workforce that consistently delivers enriching, developmentally appropriate experiences for young learners.

### Program Sustainability

Investments in program development and staffing to ensure long-term impact and continuity of Head Start services. To ensure program sustainability and long-term planning OCI funds will support day-to-day administrative functions (program operations) necessary to maintain organizational efficiency, business operations, and compliance, including coverage of essential facility costs, such as rent and utilities, to maintain a stable and functional programming for young children and families.

### Expand Opportunities for Quality Improvement

In its commitment to increase child care access, COOHS proposes to renovate the HS West Oakland site to serve local communities by delivering high-quality, impactful programming tailored to their needs.

### Expand ECE Partnerships

Head Start will expand families' access to high quality early learning programming by continuing with its partnership with BANANAS (Tiny Steps program) by increasing number of licensed family child care providers who will benefit from interactive and practice-based coaching, professional development opportunities and wraparound supports (e.g. health, mental health, transitions, housing, family wellbeing).

### Family Outreach & Engagement

COOHS will coordinate and implement comprehensive, culturally and linguistic relevant family services including outreach and enrollment, mental health, developmental screening, health and disability services. COOHS is committed to continuing to support families in setting and achieving individual and family goals while serving as a key liaison to connect them with community resources and crisis intervention support. Next year, they will also continue with their family advocacy activities, including transportation assistance to help caregivers engage in governance, and participation in local and state committees.

## APPENDIX D: EARLY CHILDHOOD SYSTEM POLICY LANDSCAPE

### NAVIGATING A DYNAMIC EARLY CHILDHOOD LANDSCAPE

With policy changes and funding shifts unfolding at every level of government, the early childhood care and education landscape in Oakland is undergoing significant and ongoing transformation. To ensure that OCI's investments remain responsive, equity-centered, and impactful, First 5 must continuously monitor this dynamic landscape, analyzing developments in public funding, policies, initiatives, program mandates, and systems infrastructure.

### FEDERAL POLICY LANDSCAPE & SYSTEMS CONSIDERATIONS

- **Federal Office of Head Start Administration and Funding:** As part of their goals to dismantle public goods and systems, the Trump Administration has begun taking steps towards eliminating the federal Head Start program. In early April 2025, the administration abruptly closed half of all the regional Head Start offices, including the Region 9 office, whose service area included programs in California without articulated transition plans. The regional offices provide invaluable administrative support, technical assistance, and conduct regular audits and reviews of federal Head Start grants.
- **Federal Administration Policies Related to Children and Families:** In addition to the proposed elimination of the federal Head Start program, the Federal Administration has goals to eliminate Child Development Block Grant (CDBG) funds, to end public benefits families with young children are entitled to, and to dismantle the entire U.S. Department of Education. The administration's discriminatory and anti-immigrant policies and inhumane enforcement activities are also expected to contribute to a decline in enrollment in public early education programs. These threats to essential programs, benefits, and services will do irreparable harm to the economy and to communities, particularly for families and children. Their undoing will erode decades of work to build the public infrastructure that protects civil rights and provides public goods and services that benefit our entire society.

### STATE POLICY LANDSCAPE & SYSTEMS CONSIDERATIONS

- **State of California's Investments in Universal Transitional Kindergarten (UTK) and Universal Pre-Kindergarten (UPK):** California's statewide UTK mandate will be fully implemented in the fall of 2025, providing all 4-year-olds access to free TK programs. Furthermore, school districts anticipate serving more 3-year-olds, and possibly younger children, with increased UPK investments from the state. However, given the state's own tenuous budget outlook, it is unclear whether the state's investments will be implemented as planned.
- **California Department of Social Services (CDSS) Child Care Rate Reform** marks a pivotal shift in the state's approach to funding early child care and education. CDSS is implementing a new methodology to base reimbursement rates for subsidized child care that incorporates the true costs of care, establishing a single reimbursement rate. This approach aims to ensure all child care providers are fairly compensated for their work in order to support a more equitable and effective early childhood system. The new methodology's implementation is planned for July 2025.

- **California’s Children and Youth Behavioral Health Initiative (CYBHI)** is a historic, five-year (2022-2027), \$4.7 billion investment by the State of California in the behavioral health system for children, youth, and young adults. CYBHI emphasizes a “whole child” approach to increase access to behavioral health services, embedding these services into early care and education settings.
- **California Advancing and Innovating Medi-Cal (CalAIM)** is transforming California’s Medi-Cal system, aiming to provide more integrated and equitable health care services. Services under CalAIM will offer families with young children coordinated physical and behavioral health care and social services. This multiyear initiative launched January 2022 with reforms being phased in through 2027.

## LOCAL POLICY LANDSCAPE & SYSTEMS CONSIDERATIONS

- **Alameda County Measure C:** In April 2024, the California Supreme Court upheld Measure C, the Children’s Health and Child Care Initiative for Alameda County. First 5 is the designated administrator of the Measure C Child Care, Preschool, and Early Education (CCPEE) Program, expected to generate \$150 million annually. Like OCI, CCPEE will expand families’ access to child care, establish a minimum wage floor for early educators, and promote children’s well-being, focusing on low to moderate income families. Measure C complements the OCI investments in Oakland’s public early education system as it offers greater flexibility in children’s age range and in child care provider types, allowing for immediate support of the mixed delivery system and an emphasis on infants and toddlers.
- **Local Leadership Changes:** Local leadership buy-in and continuity is critical to the success of systems building initiatives like OCI. Oakland’s public early care and education systems partners are experiencing significant transitions, which pose challenges to maintaining a shared vision and sustained implementation for OCI. First 5 is committed to collaborating with incoming leaders and program staff, ensuring they are oriented to OCI’s goals and strategies and supporting continued coordination across systems.
  - **OUSD:** In April 2025, the OUSD Board of Education voted to terminate the district Superintendent’s contract as of June 2025. As OUSD recruits a new Superintendent, First 5 anticipates the need to orient and partner with the new Superintendent to support the success of OCI.
  - **City of Oakland:**
    - In November 2024, the City of Oakland experienced a mayoral recall, necessitating a special election to choose a new mayor. In April 2025, the city elected a new mayor, former East Bay Congresswoman Barbara Lee. First 5 has reached out to the Mayor-Elect’s team and looks forward to supporting her administration’s onboarding to OCI.
    - The City’s Human Services Department, where the Head Start program is housed, has experienced multiple leadership changes in recent years and has not had a permanent Director since 2022.
    - The City of Oakland removed the COOHS Director and another senior staff member in the City’s Department of Human Services in April 2025. The City Administrator’s Office plans to engage with the Head Start team to support next steps for the program’s leadership.

- **Local Budget Deficits and Under-Resourced Public Systems:** Both the City of Oakland and OUSD are facing structural budget deficits following long-standing financial challenges and decades of underfunding. First 5 is monitoring local budget impacts on early care and education programming and broader early childhood investments supported by OCI.
- **Workforce Recruitment and Retention:** Ongoing program monitoring is needed, with a particular focus on staff recruitment and retention for educators, as well as public servants. Increasing PK and TK enrollment at new and existing OUSD sites, as well as challenges in public systems' hiring infrastructure, has compounded an already existing workforce shortage in the early care and education system.

## OCI PUBLIC SYSTEM PARTNER ADMINISTRATIVE CONSIDERATIONS

- **Capacity to Spend:** Since the launch of OCI in January 2023, the COOHS has consistently underspent their funding allocation due to limited administrative and workforce capacity, prompting First 5 to reach out to the City Administrator to guide and approve their FY24-25 proposal. Enrollment, recruitment and retention of educators, and efficient and timely fund utilization remain areas of significant concern for COOHS. Navigating the City of Oakland's hiring processes and the need to provide a competitive salary for early childhood educators continue to impact workforce recruitment and retention and is a key challenge to address for COOHS to increase their capacity to spend. These challenges are documented in the [Oakland Children's Initiative Program & Budget, City of Oakland Head Start FY 2024-25 memo.](#)
- **Administrative and Financial Infrastructure:** Both OUSD and COOHS face ongoing capacity challenges related to administrative infrastructure, particularly COOHS in the areas of financial management and compliance. First 5 has requested that the City of Oakland assign Finance staff to support COOHS fiscal management, reporting, and oversight practices, including tracking year-over-year spending patterns.
- **Data and Technology Infrastructure:** Data systems across OUSD and COOHS require investment to support timely and disaggregated reporting for analysis and impact evaluation. First 5, OUSD, and COOHS are in agreement that the OCI Results Based Accountability (RBA) measures do not document the full impact of OCI investments and therefore require refinement, working in partnership with the City's OCI Accountability Officer. First 5 continues to work with OUSD and COOHS to collect additional data, is designing and building a data warehouse to manage record-level data for OCI and Alameda County's Measure C to tell the full story of impact to support evaluation of both initiatives.
- **Staffing Capacity:** In addition to the elected and appointed system leader transitions mentioned above, both OUSD and COOHS have experienced staff transitions of key leadership and team members working on OCI.

## APPENDIX E: OCI PUBLIC PARTNERS PLANNING TAKEAWAYS AND FUTURE CONSIDERATIONS

Following initial OCI early childhood systems planning in FY 2023-24, First 5, OUSD, and COOHS identified the following key considerations in strengthening programming and services and building system capacity. These key considerations continue to inform First 5 recommendations for program and budgetary planning for OCI.

| Takeaways & Future Considerations                      | Oakland Unified School District (OUSD)   | City of Oakland Head Start (COOHS)  |
|--|--|---|
| <b>Strengths to Build Upon for System Coordination</b> | <ul style="list-style-type: none"> <li>• <b>Leverage outreach and public education:</b> Coordinate OUSD and First 5's engagement efforts about OCI-funded programming and opportunities.</li> <li>• <b>Workforce pathways and professional development:</b> Leverage success of OUSD's current programming and coordinate investments and professional development foundations across partners, including apprenticeships in COOHS and First 5's investments readying for Measure C and addressing the early educator crisis.</li> <li>• <b>Kindergarten Readiness Study:</b> Leverage OUSD's use of the Early Development Instrument (EDI) since 2016 to inform investments and countywide expansion.</li> <li>• <b>Kindergarten transition supports:</b> Build upon OUSD's kindergarten readiness and transition programming with the community.</li> <li>• <b>Hiring and expansion:</b> Learn from OUSD's success hiring and retaining ECE staff to expand services to children.</li> </ul> | <ul style="list-style-type: none"> <li>• <b>Basic needs and family supports:</b> Build upon COOHS model of investment in basic needs and wraparound supports for families, including food access, transportation, and family navigation to services or other parts of the ECE system.</li> <li>• <b>Mixed delivery strategy:</b> Explore and leverage COOHS to reach FCC and FFN providers to potentially coordinate and expand services.</li> <li>• <b>Workforce development:</b> Leverage initial COOHS investments in apprenticeship programming, look to expand and coordinate with OUSD and First 5 to address hiring challenges.</li> <li>• <b>Family leadership and engagement:</b> Explore opportunities to learn from Head Start's model for family leadership and engagement, including the advisory body, to apply lessons to the broader system.</li> <li>• <b>Family survey:</b> Leverage COOHS's use of the family survey to inform investments and potential expansion.</li> <li>• <b>Leveraging funding:</b> Look for opportunities to learn and build upon COOHS blending federal, state, and now local funds to provide comprehensive services for families.</li> </ul> |
| <b>Considerations for Future Planning</b>              | <ul style="list-style-type: none"> <li>• <b>Continue to analyze:</b> Consider trade-off between investments in the built environment, administrative investments, direct service, and availability of ECE for more children.</li> <li>• <b>Basic needs and family supports:</b> Enhance and explore coordination of basic needs and wraparound supports for families, including food access, transportation, family navigation to services, and reduction or elimination of family fees; explore coordination with COOHS based on their model.</li> <li>• <b>Build programs responsive to family need:</b> Explore options to expand services such as before and after care, leveraging the mixed delivery system providers to meet demand for non-traditional hours.</li> <li>• <b>Data reporting and disaggregation:</b> Continue to refine data reporting, e.g. understanding who is benefiting from OCI investments, geographically and demographically.</li> </ul>                        | <ul style="list-style-type: none"> <li>• <b>Continue to analyze:</b> Consider trade-off between investments in the built environment, administrative investments, direct service, and availability of ECE for more children.</li> <li>• <b>Stabilize infrastructure:</b> Streamline processes, improve technology, and stabilize staffing through hiring and retention strategies (e.g., wellness, substitutes).</li> <li>• <b>Administrative streamlining:</b> Explore coordination of investments across sites and systems, reducing inefficiency and siloing of programs.</li> <li>• <b>Professional development:</b> Assess variability in professional development supports and contracts to support coordination across modalities.</li> <li>• <b>Data reporting and disaggregation:</b> Understand who is benefiting from OCI investments, geographically and demographically.</li> </ul>  |

|  |  |  |
|--|--|--|
|  | <ul style="list-style-type: none"> <li>• <b>Timely use of funds:</b> Monitor expenditures to assess availability of funds for mixed delivery and/or capital investment.</li> <li>• <b>Capital investments:</b> Explore coordination of capital and facilities investments by OUSD and City of Oakland to ensure equity-driven geographic distribution of OCI resources, and buildout of young-child-centered classrooms and family spaces in Oakland.</li> <li>• <b>Expansion to younger ages:</b> Consider developmentally appropriate services for all ages mandated in OCI and building capacity to meet needs.</li> <li>• <b>Technology:</b> Continue buildout of ECE and TK-12 enrollment system; explore opportunities to leverage OUSD's Aeries portal for cross-system interoperability and coordination.</li> </ul> | <ul style="list-style-type: none"> <li>• <b>Timely use of funds:</b> Monitor expenditures to assess the availability of funds for mixed delivery and/or capital investment.</li> <li>• <b>Monitor impact of city budget deficit:</b> Track budget and potential declining general fund commitment and resulting needed increases in OCI to maintain current capacity.</li> </ul> |
|--|--|--|

| Takeaways & Future Considerations   | First 5 Alameda County  |  |
|-------------------------------------|---|--|
| <b>Continuous Fiscal Monitoring</b> | <ul style="list-style-type: none"> <li>• <b>Continue to analyze:</b> Consider trade-off between investments in the built environment, administrative investments, direct service, and availability of ECE 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.</li> <li>• <b>Mixed delivery system:</b> Continue to closely monitor the spending of our priority 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.</li> <li>• <b>Timely use of funds:</b> Monitor expenditures to assess availability of funds for mixed delivery and/or capital investment.</li> <li>• <b>Monitor impact of public system budget deficits:</b> Track budget and potential declining general fund commitment and resulting needed increases in OCI to maintain current capacity.</li> </ul>   |  |
| <b>Coordinated Investments</b>      | <ul style="list-style-type: none"> <li>• <b>Capital investments:</b> Optimize impact of infrastructure investments by coordinating projects across systems and by geography; 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.</li> <li>• <b>Shared business services:</b> Explore opportunities for economies of scale through purchasing of goods and services.</li> <li>• <b>Technology:</b> Identify cross-system interoperability opportunities to support eligibility, enrollment, and collection of data in the build out of a more coordinated system.</li> <li>• <b>Stabilize infrastructure:</b> Streamline processes, improve technology, and stabilize staffing through hiring and retention strategies.</li> <li>• <b>Administrative streamlining:</b> Explore coordination of investments across sites and systems, reducing inefficiency and siloing of programs.</li> </ul> |  |
| <b>Assessing for Impact</b>         | <ul style="list-style-type: none"> <li>• <b>Evaluation:</b> Explore evaluation coordination between OCI and Measure C and utilize findings to inform investment.</li> <li>• <b>Data sharing:</b> Establish multi-sector data MOUs to support the measurement of impact.</li> <li>• <b>Data collection:</b> 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.</li> </ul>  |  |



|                              |   |
|------------------------------|---|
| <b>Family Partnerships</b>   | <ul style="list-style-type: none"> <li>• <b>Basic needs and family supports:</b> Enhance and explore coordination of basic needs and wraparound supports for families, including food access, transportation, family navigation to services, and expanded kindergarten transitional supports.</li> <li>• Family leadership and engagement: Apply learning and explore opportunities for family leadership and engagement across the broader ECE system.</li> <li>• <b>Leverage outreach and public education:</b> Increase awareness about the initiative to support parent, caregiver, and provider access to OCI funded activities/services.</li> <li>• <b>Oakland's asset of diversity:</b> Expand 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.</li> </ul> |
| <b>Programming</b>           | <ul style="list-style-type: none"> <li>• <b>Build programs responsive to parent need:</b> Explore options to expand services such as before and after care; explore leveraging the mixed delivery system providers to meet demand for non-traditional hours.</li> <li>• <b>Mixed delivery strategy:</b> Leverage existing partnership with mixed delivery system, centers, FCC, and FFN providers to potentially coordinate and expand services pending available funding.</li> <li>• <b>Expansion to younger ages:</b> Consider developmentally appropriate services for all ages mandated in OCI and building capacity to meet needs.</li> </ul>  |
| <b>Educator Enhancements</b> | <ul style="list-style-type: none"> <li>• <b>Workforce pathways:</b> Leverage current investments, specifically apprenticeship programs, to address ECE workforce crisis.</li> <li>• <b>Professional development:</b> Explore standards and coordination of training and curriculum across service modalities, e.g. equity, parent partnership, and child development.</li> <li>• <b>Learning modalities:</b> Incorporate early identification and screening, as well as supports for neurodivergent children.</li> </ul>  |

## APPENDIX F: OUSD AND COOHS SUMMARY OF INVESTMENTS BY OCI ORDINANCE GOALS

In FY 2025-26, OUSD is increasing investment in Goals 1a/b: to make available free or affordable high quality early education and preschool for 3- and 4-year-olds from low-income families.

| OUSD Investments by OCI Ordinance Goal, FY 2024-25 and FY 2025-26                          |                                 |              |
|--|---------------------------------|--------------|
| OCI Ordinance Goal   | Percent of Total of OUSD Budget |              |
|  | FY 2024-2025                    | FY 2025-2026 |
| <b>Goal 1a:</b> Availability of free or affordable ECE programs for low-income 4-year-olds | 27%                             | 50%          |
| <b>Goal 1b:</b> Availability of free or affordable ECE programs for low-income 3-year-olds | 11%                             | 18%          |
| <b>Goals 1c:</b> Affordability and/or quality for all 4-year-olds                          | 11%                             | 8%           |
| <b>Goal 1d:</b> Affordability and/or quality for all 3-year-olds                           | 5%                              | 3%           |
| <b>Goal 2:</b> External evaluation   | 0%                              | 0%           |
| <b>Goal 3:</b> Professional development and coaching opportunities                         | 24%                             | 8%           |
| <b>Goal 4:</b> Coordinate federal, state and local resources                               | 9%                              | 6%           |
| <b>Goal 5:</b> Priority consideration for children with the highest need                   | 13%                             | 7%           |

### COOHS SUMMARY OF INVESTMENTS BY OCI ORDINANCE GOAL

The COOHS FY 2025-26 Program Plan continues the same investments from FY 2024-25, primarily investing in Goals 1a/b, with 48% of the budget (\$3.5M) dedicated to personnel at the three OCI funded sites and staff to open the new site in West Oakland. The budget increase in FY 2025-26 is also in Goal 1a/b with a \$500,000 investment in renovating the new West Oakland site and a 2% increase in salaries.

| COOHS Investments by OCI Ordinance Goal, FY 2024-25 and FY 2025-26                         |                               |              |
|--|-------------------------------|--------------|
| OCI Ordinance Goal   | Percent Total of COOHS Budget |              |
|  | FY 2024-2025                  | FY 2025-2026 |
| <b>Goal 1a:</b> Availability of free or affordable ECE programs for low-income 4-year-olds | 35%                           | 37%          |
| <b>Goal 1b:</b> Availability of free or affordable ECE programs for low-income 3-year-olds | 23%                           | 23%          |
| <b>Goals 1c:</b> Affordability and/or quality for all 4-year-olds                          | 6%                            | 5%           |
| <b>Goal 1d:</b> Affordability and/or quality for all 3-year-olds                           | 4%                            | 4%           |
| <b>Goal 2:</b> External evaluation   | 0%                            | 0%           |
| <b>Goal 3:</b> Professional development and coaching opportunities                         | 5%                            | 5%           |
| <b>Goal 4:</b> Coordinate federal, state and local resources                               | 24%                           | 23%          |
| <b>Goal 5:</b> Priority consideration for children with the highest need                   | 3%                            | 3%           |

## APPENDIX G: LOCAL SYSTEM BUILDING WITH COMMUNITY INPUT

See full summary of Community Listening Sessions in [Appendix H2. Oakland Children's Initiative Community Listening Sessions Key Themes and Recommendations report.](#)

| Community Listening Sessions Participant-Identified Recommendations & Priorities          | OUSD Strengths  | OUSD Considerations   | COOHS Programmatic Strengths   | COOHS Considerations for Future Planning   |
|---|---|---|--|--|
| <b>PRIORITY POPULATIONS</b><br>Increase navigators and prioritize marginalized groups     | Expanded Family Navigator program and equitable enrollment outreach for families furthest from opportunity, including refugee and newcomer status and unhoused families | Conduct deeper analysis of remaining gaps in access to early learning services to ensure investments are reaching families with the highest needs   | Embedded Family Service Specialists to support child care access   | Enhance data collection, reporting, and systems to ensure robust accountability measures and to document the full programmatic impact of the Initiative's investments.   |
| <b>OUTREACH</b><br>Expand culturally and linguistically responsive outreach               | Invested in multilingual and culturally responsive outreach strategies and strengthened use of geographic targeting tools to ensure equitable outreach to the community | Broaden outreach partnerships with a diversity of trusted messengers (e.g., faith-based groups, medical providers) to deepen outreach and family engagement                                 | Expanded mixed delivery through community partnerships with BANANAS to increase the number of licensed FCCs participating in the Head Start model            | Enhance multilingual outreach and enrollment, and community-centered models to expand number of families and children served   |
| <b>CLASSROOM EXPERIENCES</b><br>Lower educator-child ratios and improve curriculum        | Invested in Substitute Teacher Incentive Plan (STIP) subs, tutors, and embedded PD/coaching to strengthen classrooms and maintain lower educator-child ratios           | Continue lowering classroom ratios where possible and enhancing curriculum supports, including universal design of learning principles  | Invested in the use of evidence-based child observation and assessments tools to support children's development and early identification of areas of concern | Invest in comprehensive and thorough use of developmentally appropriate practices that yield more intentional and meaningful teacher-child interactions and an equitable learning environment for all children to thrive |
| <b>HOURS OF OPERATION AND LOCATION</b><br>Expand extended-hour and overnight care options | Active site expansion for PK and TK programs. Both PK and TK programming have full day options for families   | Further explore before/after care models and flexible scheduling options to meet family needs   | Provided stable and full-day care options for families across sites, in addition to comprehensive services for families                                      | Explore service expansion into non-traditional hours and increase the number of mobile classrooms to meet community needs  |
| <b>INCLUSION SUPPORTS</b><br>Invest in inclusive classrooms and staff training            | Scaled MTSS and inclusion supports across TK classrooms   | Continue to scale inclusive classroom model and MTSS supports across all TK and PK classrooms and build on existing partnerships to provide mental health services (e.g., Lincoln Families) | Invested in practice-based coaching focused on inclusion supports for teaching staff   | Continue to expand investments in early learning settings universal design of learning, developmental screening and referral services  |

|  |  |  |  |  |
|--|--|--|--|--|
| <b>FAMILY SUPPORTS AND BASIC NEEDS</b><br>Centralize wraparound family supports and navigation       | Expanded Family Navigator services to provide outreach and enrollment support and link families to wraparound services   | Continue to scale family navigation models to link families to broader community-based resources                             | Expanded family navigation to community resources and access to basic needs (e.g., food, diapers, etc.)  | Strengthen comprehensive services for families (e.g., basic needs, home visiting, developmental screening and mental health supports)  |
| <b>PROFESSIONAL DEVELOPMENT FOR EDUCATORS</b><br>Enhance access to equitable PD and career pipelines | Developed a robust coaching and PD system incorporating partnerships with SEEDS and Tandem to focus on early literacy, trauma-informed care, and Universal Design for Learning | Deepen inclusion-focused PD opportunities and align content across modalities  | Provided ongoing PD and reflective coaching to support teaching staff professional growth Implemented a career ladder through a tiered teaching system and focus on apprenticeship programs to promote workforce development and retention | Expand PD opportunities to teaching staffStrengthen apprenticeship models to establish strategic teacher advancement pathways to improve workforce retention at all teacher levels             |
| <b>FACILITIES</b><br>Invest in facilities and infrastructure improvements                            | Began the pre-work for the Washington CDC renovations to increase the number of TK and PK classrooms   | Ensure equitable upgrades across neighborhoods and align capital planning with Alameda County's Measure C for broader impact | Invested in ongoing site renovations at OCI-funded locations   | Ensure all sites meet health and safety standards, maintain good standing status with licensing, and foster equitable and accessible high quality early learning environments for all children |

## APPENDIX H: SUPPLEMENTAL DOCUMENTS

1. First 5 Memo to the City of Oakland re: Oakland Children's Initiative Program & Budget, City of Oakland Head Start FY 2024-25, April 18, 2025
2. Oakland Children's Initiative Community Listening Sessions Key Themes and Recommendations report, West Ed April 2025
3. School Readiness Consulting Proposed Scope of Work for the Oakland Children's Initiative
4. Building an Early Care and Education System in Oakland – Executive Summary, HTA Consulting, Fall 2024
5. Building an Early Care and Education System in Oakland – Implementation Process Review, HTA Consulting, Fall 2024
6. Introducing a Universal County-wide Tool to Assess Kindergarten Readiness, First 5 Policy Brief October 2024
7. Oakland Children's Initiative Program & Budget Overview, FY 2024-2025 TO FY 2026-27, First 5, April 3, 2024
8. Measure C Community Listening Sessions Key Themes and Recommendations report, WestEd, March 2025

# CITATIONS

1. This total sums FY 2022-23 and FY 2023-224 actual expenditures, the FY 2024-25 approved budget, and the FY 2025-26 proposed budget.
2. Assumes 5% annual increase for FY2024-25 – FY2026-27
3. Assumes 5% growth from prior year Baseline Budget for OUSD and COOHS
4. Assumes 5% annual increase for FY2024-25 – FY2026-27
5. Assumes 5% annual increase for FY2024-25 – FY2026-27; Assumes 5% growth from prior year Baseline Budget for OUSD and COOHS
6.
  - a. Early Childhood Education Journal (2022) Nov 15:1-13. Entering Kindergarten After Years of Play: A Cross-Case Analysis of School Readiness Following Play Based Education Does Early Childhood Education Help to Improve High School Outcomes? Results form Tulsa. Child Development (2022) July 93(4).
  - b. So, M., Woodward, K. P., Shlafer, R. J., Testa, A., Davis, L., & Jackson, D. B. (2023). Positive Early Childhood Experiences and School Readiness among US Preschoolers. Journal of Pediatrics, 262, Article 113637. <https://doi.org/10.1016/j.jpeds.2023.113637>
7. Data Notes, Estimated Children Served:
  - a. Population Estimates: Source is US Census data from the American Community Survey 2025 Public Use Microdata Sample (PUMS) 5-year estimates for the number of Oakland children under 85% state median income. Population estimates of children in single year age bands by family income contain a significant degree of uncertainty and should only be used as rough estimates.
  - b. Enrollment: Point in Time enrollment reflects data from Q3 (Jan-March), based on First 5 summary of individual-level data submissions from the partners; previous drafts of this memo included enrollment estimates by single-year ages using aggregate data. Enrollment data only includes children whose home address is in Oakland.
  - c. Projected Enrollment: OUSD - based on total population targets in the FY25-26 OUSD Program and Budget Template, adjusted by age and income using historical enrollment patterns. COOHS - based on projected capacities set by COOHS in the FY24-25 COOHS Program and Budget Template; projections include the three sites enrollment has been reported on previously (Arroyo, Franklin, and Tassafaronga), plus projections for Family Child Care Providers, Family Friend and Neighbors, and children served by COOHS systemwide OCI investments.
  - d. Mixed Delivery System: The methodology for the estimates of children served in the Mixed Delivery system changed from 22-23 to 23-24; 22-23 estimates are for sites with Oakland addresses: 23-24 estimates are for children with Oakland addresses.
  - e. Estimated Remaining Gap: Not including additional children who may be served through potential OCI investments the mixed delivery system.
8. Children served data are point in time enrollments. IEP: Individualized Education Plan. IFSP: Individualized Family Service Plan.
9. OUSD Early Childhood Education Welcome Page: <https://www.ousd.org/enroll/enroll-at-ousd/ece>
10. MTSS is an integrated, comprehensive framework that focuses on instruction, differentiated and student-centered learning, individualized student needs, and the alignment of systems necessary for all students' academic, behavioral, and social success. California Department of Education Definition of MTSS: <https://www.cde.ca.gov/ci/cr/ri/mtsscompri2.asp>.
11. Data Notes, Children Served OUSD:
  - a. Enrollment: Point in Time enrollment reflects data from Q3 (Jan-March), based on First 5 summary of individual-level data submissions from the partners; previous drafts of this memo included enrollment estimates by single-year ages using aggregate data. Enrollment data only includes children whose home address is in Oakland.
  - b. Projected Enrollment: OUSD - based on total population targets in the FY25-26 OUSD Program and Budget Template, adjusted by age and income using historical enrollment patterns.
12. Assuming 5% growth each year from Baseline Budget
13. Data Notes, Children Served COOHS:
  - a. Enrollment: Point in Time enrollment reflects data from Q3 (Jan-March), based on First 5 summary of individual-level data submissions from the partners; previous drafts of this memo included enrollment estimates by single-year ages using aggregate data. Enrollment data only includes children whose home address is in Oakland.
  - b. Projected Enrollment: COOHS - based on projected capacities set by COOHS in the FY24-25 COOHS Program and Budget Template; projections include the three sites enrollment has been reported on previously (Arroyo, Franklin, and Tassafaronga), plus projections for Family Child Care Providers, Family Friend and Neighbors, and children served by COOHS systemwide OCI investments.
14. Assuming 5% growth each year from Baseline Budget
15. COOHS submitted a revised proposal, as reviewed by the Oakland City Administrator's Office, on February 14, 2025. As of May 16, 2025, final review and approval by the Oakland City Council is pending.
16. The Charter of the City of Oakland - Article XVI - The Children's Initiative of 2018 Section 1606(b)(2)
17. Please see the Oakland Children's Initiative Program & Budget, City of Oakland Head Start FY 2024-25 memo which outlines First 5's recommendations and documented concerns.
18. Administrative Costs for FY 2024-2025 – FY 2026-2027 are 15% of the proposed Early Education Fund budget to support First 5's intermediary role, including staffing, administration, and systems building efforts with OUSD, COOHS, and other local partners.





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