



**Measure G1 - Districtwide Teacher Retention and Middle School
Improvement Act Oversight Commission**

Frederick Mesa, Chairperson

Tiffany Chan, Vice Chairperson

Caroline Lee, Secretary

Terrence Riley, Commissioner

Brandon Wall, Commissioner

To: Board of Education

From: Measure G1 – Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission

Frederick Mesa, Chairperson

Tiffany Chan, Vice Chairperson

Caroline Lee, Secretary

Terrence Riley, Commissioner

Brandon Wall, Commissioner

Date: September 8, 2026

Re: Legislative File 26-1727, Proposed Expenditures for Measure G1 Surplus

Submitted pursuant to Board Bylaw 9131.

Summary

The Middle School Network has asked this Commission to recommend that the Board adopt \$5,061,120.36 in proposed expenditures from the Measure G1 surplus. The proposal would charge six Academics Coordinator positions to Measure G1 across fiscal years 2021-22 through 2026-27.

The Commission cannot recommend adoption as submitted. We have significant concerns about whether these charges are allowable under the Measure and under the Board's own Administrative Regulations, and we believe the proposal as structured creates real risk of an adverse finding in the annual Measure G1 audit. We recognize the fiscal pressure the District is under. Our concern is that this plan will likely cost the District more than it saves, and that a compliant path to using these funds for middle schools is available.

What the proposal does

Exhibit A is titled "Measure G1 Spenddown." It lists six Academics Coordinators and distributes their salary and benefit costs across six fiscal years:

Fiscal year	Amount
2021-22	\$291,958.96
2022-23	\$347,533.92
2023-24	\$590,721.05
2024-25	\$1,149,893.99
2025-26	\$1,341,797.80
2026-27	\$1,339,214.64

Fiscal year	Amount
Total	\$5,061,120.36

Approximately \$2.38 million, or 47%, relates to fiscal years 2021-22 through 2024-25. The remaining \$2.68 million relates to the just-closed year and the current year. The 2026-27 amount of \$1,339,214.64 has not been incurred and is budgeted in the General Fund.

The concerns

1. The surplus derives from the 35% Middle School grant pool, and grant funds flow only through approved school plans.

Board-approved processes ensure each school, including charters, gets a fair share of the funds. Using these funds for a few academic coaches cuts out several schools that should be eligible to receive any redistribution.

Measure G1 divides revenues between school site educator raises (65%) and Middle School grants (35%). The surplus at issue derives from the grant pool. Under the Measure, distribution of grant funds is conditioned on the Board of Education's approval of each school's Education Improvement Plan (the site application under Administrative Regulations Section 6). Section 6(a) further requires approval by this Commission and requires that both approvals occur before funds are disbursed. No school requested these positions through the application process. No site plan for any year identifies them. The proposal would therefore direct grant pool funds to positions that never passed through the mechanism the Measure establishes for grant pool spending.

We note that this cannot be cured retroactively for closed fiscal years. A 2022-23 Education Improvement Plan cannot be approved in 2026. The Commission understands that departures from required administrative procedure may be noted in the audit report even where they do not rise to noncompliance, and that whether this is tested depends on the audit program.

2. Administrative Regulations Section 3(d)(vii) appears to prohibit these charges directly

The Administrative Regulations state that pre-existing services, programs, staff, or materials that meet the Measure G1 goals but were funded in the previous year using non-G1 funds are not allowable Measure G1 expenses. Section 8 adds that decisions to eliminate funding for existing staff to use Measure G1 funds are not allowable.

These six positions have been funded from other sources for up to six consecutive years. The regulation contains no exception for corrected coding. We ask the Board to address this provision directly, because it is the Board's own adopted regulation and the proposal appears to directly conflict with it.

3. The stated rationale belongs to the other funding pool

We understand the justification to be that instructional coaching supports teacher retention. Teacher retention is Goal (a) of the Measure, and it is the purpose the 65% school site educator raise pool serves.

The 35% Middle School grant pool exists for the Measure's other three goals: increasing access to arts, music, and world languages in grades 6-8; improving student retention in the transition from elementary to middle school; and creating a more positive and safer middle school environment. The proposal does not explain how instructional supervision and staff development advance any of those three goals, and we do not believe a retention rationale can support a charge to the grant pool.

4. The account coding indicates central office positions

The account strings in Exhibit A appear to identify these as central positions rather than school site positions. Each coordinator row carries object code 1305 (certificated supervisor/instructional coach), function codes in the 2100 range (instructional supervision and administration and instructional staff development), and location codes in the 909 series. One position appears to be currently funded by Title III, a federal grant program under Every Student Succeeds Act.

The Measure states that Middle School grants shall only be spent at Middle Schools. If these positions are assigned centrally, that restriction is not satisfied.

We ask that the position control record for each of the six position control numbers be provided, showing

assigned location, reporting supervisor, and job description, so this question can be resolved on the record rather than inferred from coding.

5. Supplement, not supplant

The Measure requires the annual independent audit to determine that revenues are used to supplement, and not supplant, unrestricted General Fund revenue appropriated to serve grades 6-8.

The 2026-27 portion is the clearest exposure. Those positions are in the currently adopted General Fund budget and the costs have not yet been incurred. Moving them to Measure G1 relieves the General Fund of an appropriation it currently carries. We do not believe that can be characterized as supplemental.

The District may describe this as correcting a coding error. That does not resolve the supplanting question. Supplanting turns on what happens to the money, not why the original coding was wrong, and either way the effect is that the General Fund is relieved of costs it was carrying.

The error explanation also does not hold on its own terms. Calling something miscoded assumes a correct code existed. Grant pool funds only become available to a school after that school requests them in a plan the Board approves. No school requested these positions in any of these years. There was no correct code to have used.

6. The supporting record is thin for an item of this size

The board memorandum states that staff is open to questions. It does not include an analysis of which Measure G1 goal each position serves, a supplement-not-supplant analysis, any school site plan or grant application, or an explanation of how the positions satisfy the Middle School grant requirements.

We also note several items in Exhibit A that require explanation before any recommendation could be made:

- The 2021-22 detail shows position control number 6279 as vacant at 1.0 FTE with \$94,318.50 in earnings. We ask what was paid and to whom.
- Two positions are labeled ".5FTE only" in the summary, but the position detail shows one of them at 100 percent and 1.00000 FTE, at the highest annual cost of the six.
- One position appears to be Title III funded. Shifting a federally funded position raises separate federal supplement-not-supplant questions that should be reviewed before action.
- The proposal totals \$5,061,120.36 against a surplus of approximately \$5.8 million. We ask what is intended for the remaining balance.

Why this matters beyond compliance

Measure G1 expires June 30, 2029. Renewal will require a two-thirds vote from Oakland residents.

The District's ability to make that case rests substantially on a record of clean Measure G1 audits. An audit finding that Measure G1 funds were used to relieve General Fund obligations would be difficult to explain to voters and would be a central feature of any opposition campaign.

There is also a nearer-term fiscal consideration. If restricted funds are found to have been spent outside their authorized purpose, the standard remedy in audit resolution is to restore the fund from unrestricted resources. If that occurs here, the District would recognize the liability in a later fiscal year rather than avoiding it. Current projections do not suggest 2027-28 will be an easier year in which to absorb it.

The Administrative Regulations also identify step-down funding at the expiration of the Measure's twelve-year term as the first permitted use of the surplus. This surplus is the only resource presently available for that purpose. Spending it now forecloses the cushion the regulations contemplate for the 2029 cliff.

The Commission notes that the audit is a retrospective compliance review. The District's independent auditors examine expenditures after they are made and report whether they were allowable under the Measure. They do not advise on whether a proposed action is permitted, and they have no role in approving expenditures in advance. Deferring the question of permissibility to the audit therefore leaves it unanswered at the point the decision is made and shifts the consequence of an incorrect answer into a later fiscal year.

What we recommend instead

The Commission supports using the surplus for middle schools. We ask that it be used through the mechanisms the Measure and the Administrative Regulations already provide:

1. **Distribute the surplus to middle schools through the existing process.** Administrative Regulations Section 10(a)(v) authorizes increasing funding to all Measure G1 sites at an equal percentage to aid in spending down the surplus. Schools would apply through the standard application process, plans would come to this Commission and to the Board, and the funds would reach middle school students through arts, music, world language, retention, and school climate programming.
2. **If the District believes coaching support serves Measure G1 goals, bring it through the front door for 2026-27.** That year has not yet been incurred and remains curable. Schools can request coaching support in their plans, the Commission can review it, and the Board can approve it. We are not opposed to the substance. We are asking that it follow the process.
3. **Reserve a defined portion for step-down.** We further recommend that the Commission and staff jointly develop a definition of step-down funding and a target reserve level well before 2029, since the term is currently used in the Administrative Regulations without definition.

Requests before the Board acts

The Commission asks that the Board defer action until staff has provided the following. We note that most of this is documentation the District will need to produce for the annual audit regardless, since transfers between funding sources are examined individually rather than sampled.

1. Position control records for all six position control numbers, showing assigned location, reporting supervisor, and job description.
2. Confirmation of whether District counsel has reviewed the proposal, and if so, the legal basis for charging these positions to the Measure G1 grant pool.
3. Documentation of the District's basis for determining these positions are Measure G1 eligible, and the District's position on Administrative Regulations Section 3(d)(vii).
4. A written supplement-not-supplant analysis, addressing the 2026-27 portion specifically.

Closing

This Commission is advisory and the Board holds final authority. We recognize the Board may weigh considerations that are not before us.

We ask that these questions be answered on the record first, so that whatever the Board decides, it does so with the compliance picture and the 2029 renewal in view. We are prepared to work with staff on a compliant path that puts these funds into middle schools.

Motion below adopted by the following vote:

...Approval by the Measure G1 Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission, of its disapproval of the Proposed Expenditures for Measure G1 Surplus, as delineated in attached Exhibit A, incorporated by reference as though fully set forth, and transmission of a Letter to the Board of Education of its reasons therefor, along with recommendations for alternative use subject to further consideration and recommendation by the Commission.

AYES:

NAYS:

ABSTAINED:

ABSENT:

RECUSED:

CERTIFICATION

We, Fredrick Mesa, Chairperson and Caroline Lee, Secretary, respectively, do hereby certify that the foregoing Motion was duly adopted by the Measure G1 - Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission at a Regular Meeting held on the 8th day of September 2026, with a copy of the Resolution being on file in the Office of the Measure G1 Commission of the District.

Frederick Mesa
Chairperson, Measure G1
Commission

Caroline Lee
Secretary, Measure G1 Commission

Attachment: Exhibit A - Measure G1 Commission Legislative File No. 26-1727B

Exhibit A

Board Office Use: Legislative File Info.	
File ID Number	26-1727
Introduction Date	8/11/2026
Enactment Number	
Enactment Date	



**OAKLAND UNIFIED
SCHOOL DISTRICT**
Community Schools, Thriving Students

Board Cover Memorandum

To Measure G1 Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission

From Middle School Network

Meeting Date August 11, 2026

Subject Discussion and Recommendation of Proposed Expenditures for Measure G1 Surplus

Ask of the Commission Adoption by the Board of Education, upon Recommendation by Measure G1 Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission of the Proposed Expenditures for Measure G1 Surplus.

Discussion Middle School Network is open to questions from the commission regarding the discussion and recommendation of the Proposed Expenditures for Measure G1 Surplus.

Attachment(s) Exhibit A

Measure G1 Spenddown

Coordinators that support Teachers with Coaching support

Academics Coordinators	PCN	Emp ID	21-22	22-23	23-24	24-25	25-26	26-27
Bruland, Jeanne	7697	32358	\$133,435.74	\$160,543.56	\$175,222.52	\$193,473.12	\$193,473.12	\$193,472.76
Ortega, Courtney	10000	16157	\$158,523.22	\$186,990.36	\$205,578.06	\$226,682.40	\$228,215.67	\$227,698.44
Zulueta, Herberta	10003	12477			\$104,974.28	\$226,835.39	\$228,370.00	\$227,853.48
Stauffer, Amy	11091	14832			\$104,946.19	\$226,759.08	\$228,291.48	\$227,775.12
Claire Fisher (.5FTE only)	10402	20923				\$276,144.00	\$277,676.40	\$277,160.04
Reed, Vonzele (.5FTE only)	6279	26241					\$185,771.13	\$185,254.80
Total	\$5,061,120.36		\$291,958.96	\$347,533.92	\$590,721.05	\$1,149,893.99	\$1,341,797.80	\$1,339,214.64

Pos20a

Position Cost by Account

Active 07/01/2026										Fiscal Year 2026/27	
Name	ID	Acct %	FTE	Position/ Addon	Earnings	Retirement	Taxes	H & W	Other	Total	
Object 1119 - Tch Spec Ass Sc											
010-4203-0-1110-1000-1119-954-9540-1169-9999-99999, Title3 EL Stud.Instruction,Tch Spec Ass Sc,Elm/mtl/ingl Ac											
STAUFFER, AMY M	014832	100.00	1.00000	11091-2	120,866.04	23,085.36	6,212.64	35,090.76		185,254.80	
Object 1305 - Supv Instr Coac											
010-0005-0-1110-2100-1305-909-9090-1110-9999-99999, Cen.Supplement,Instr Spv/admin,Supv Instr Coac,Academic Ins											
BRULAND, JEANNE	032358	100.00	1.00000	7697-9	155,091.00		7,894.08	35,091.00		227,698.44	
FISHER, CLAIRE A	020923	100.00	1.00000	10402-3	194,919.24	37,229.52	9,921.36	35,089.92		277,160.04	
ORTEGA, COURTNEY K	016157	100.00	1.00000	10000-4	155,091.00	29,622.36	8,049.12	35,091.00		227,853.48	
REED, VONZELE	026241	100.00	1.00000	6279-8	155,091.00	29,622.36	7,971.60	35,091.00	787.80	229,472.76	
ZULUETA, HERBERTA C	012477	100.00	1.00000	10003-4	155,091.00	29,622.36	7,971.60	35,090.16		227,775.12	
Account Totals		# of Employees 5			815,283.24	155,718.96	41,807.76	141,149.88	.00	1,153,959.84	
Org Total					936,149.28	178,804.32	48,020.40	176,240.64	.00	1,339,214.64	

Active 07/01/2025										Fiscal Year 2025/26	
Name	ID	Acct %	FTE	Position/ Addon	Earnings	Retirement	Taxes	H & W	Other	Total	
Object 1119 - Tch Spec Ass Sc											
010-4203-0-1110-1000-1119-954-9540-1169-9999-99999, Title3 EL Stud.Instruction,Tch Spec Ass Sc,Elm/mtl/ingl Ac											
STAUFFER, AMY M	014832	100.00	1.00000	11091-1	120,866.04	23,085.36	6,212.61	35,607.12		185,771.13	
Object 1305 - Supv Instr Coac											
010-0005-0-1110-2100-1305-909-9090-1110-9999-99999, Cen.Supplement,Instr Spv/admin,Supv Instr Coac,Academic Ins											
BRULAND, JEANNE	032358	100.00	1.00000	7697-6	41,676.70	7,960.24	2,121.33	9,422.05		61,180.32	
		100.00	1.00000	7697-7	13,665.00	2,610.02	695.54	2,447.91		19,418.47	
		100.00	1.00000	7697-8	99,750.00	19,052.24	5,077.24	23,737.40		147,616.88	
Employee Total					155,091.70	29,622.50	7,894.11	35,607.36	.00	228,215.67	
FISHER, CLAIRE A	020923	100.00	1.00000	10402-2	194,919.24	37,229.52	9,921.36	35,606.28		277,676.40	
ORTEGA, COURTNEY K	016157	100.00	1.00000	10000-3	155,091.00	29,622.36	8,049.12	35,607.52		228,370.00	
REED, VONZELE	026241	100.00	1.00000	6279-7	155,091.00	29,622.36	7,971.60	35,607.52		228,370.00	
ZULUETA, HERBERTA C	012477	100.00	1.00000	10003-3	155,091.00	29,622.36	7,971.60	35,606.52		228,291.48	
Account Totals	# of Employees 5				815,283.94	155,719.10	41,807.79	143,215.84	.00	1,156,026.67	
Org Total					936,149.98	178,804.46	48,020.40	178,822.96	.00	1,341,797.80	

Active 07/01/2024									Fiscal Year 2024/25		
Name	ID	Acct %	FTE	Position/Addon	Earnings	Retirement	Taxes	H & W	Other	Total	
Object 1305 - Supv Instr Coac											
010-0005-0-1110-2100-1305-909-9090-1110-9999-99999, Cen.Suppement,Instr Spv/admin,Supv Instr Coac,Academic Ins											
BRULAND, JEANNE	032358	100.00	1.00000	7697-5	155,091.00	29,622.36	7,894.08	34,074.96		226,682.40	
ORTEGA, COURTNEY K	016157	100.00	1.00000	10000-2	155,091.00	29,622.36	8,049.12	34,072.91		226,835.39	
REED, VONZELE	026241	100.00	1.00000	6279-6	155,091.00	29,622.36	7,971.60	788.16		193,473.12	
ZULUETA, HERBERTA C	012477	100.00	1.00000	10003-2	155,091.00	29,622.36	7,971.60	34,074.12		226,759.08	
Account Totals		# of Employees 4			620,364.00	118,489.44	31,886.40	103,010.15	.00	873,749.99	
010-0005-0-1110-2140-1305-909-9090-1110-0304-99999, Cen.Suppement,Instruc Staf De,Supv Instr Coac,Academic Ins											
FISHER, CLAIRE A	020923	100.00	1.00000	10402-1	194,919.24	37,229.52	9,921.36	34,073.88		276,144.00	
Totals for Object 1305 - Supv Instr Coac					815,283.24	155,718.96	41,807.76	137,084.03	.00	1,149,893.99	

Active 07/01/2023										Fiscal Year 2023/24	
Name	ID	Acct %	FTE	Position/ Addon	Earnings	Retirement	Taxes	H & W	Other	Total	
Object 1305 - Supv Instr Coac											
010-0005-0-1110-2100-1305-909-9090-1110-9999-99999, Cen.Supplement,Instr Spv/admin,Supv Instr Coac,Academic Ins											
BRULAND, JEANNE	032358	100.00	1.00000	7697-4	140,353.92	26,807.64	7,144.06	31,272.44		205,578.06	
ORTEGA, COURTNEY K	016157	100.00	1.00000	10000-1	59,356.74	11,337.15	3,080.63	31,199.76		104,974.28	
REED, VONZELE	026241	100.00	1.00000	6279-5	140,353.92	26,807.64	7,208.96	852.00		175,222.52	
ZULUETA, HERBERTA C	012477	100.00	1.00000	10003-1	59,356.74	11,337.15	3,050.94	31,201.36		104,946.19	
Account Totals	# of Employees 4				399,421.32	76,289.58	20,484.59	94,525.56	.00	590,721.05	

Active 07/01/2022										Fiscal Year 2022/23	
Name	ID	Acct %	FTE	Position/ Addon	Earnings	Retirement	Taxes	H & W	Other	Total	
Object 1305 - Supv Instr Coac											
010-0005-0-1110-2100-1305-909-9090-1110-9999-99999, Cen.Supplement,Instr Spv/admin,Supv Instr Coac,Academic Ins											
BRULAND, JEANNE	032358	100.00	1.00000	7697-3	127,594.44	24,370.56	7,066.72	27,956.64		186,990.36	
REED, VONZELE	026241	100.00	1.00000	6279-4	127,594.44	24,370.56	7,706.64	871.92		160,543.56	
Account Totals	# of Employees 2				255,188.88	48,741.12	14,773.36	28,828.56	.00	347,533.92	

Active 07/01/2021										Fiscal Year 2021/22	
Name	ID	Acct %	FTE	Position/ Addon	Earnings	Retirement	Taxes	H & W	Other	Total	
Object 1305 - Supv Instr Coac											
010-0005-0-1110-2100-1305-909-9090-1110-9999-99999, Cen.Supplement,Instr Spv/admin,Supv Instr Coac,Academic Ins											
BRULAND, JEANNE	032358	100.00	1.00000	7697-2	120,372.12	20,367.00	6,208.50	11,575.60		158,523.22	
Vacant		100.00	1.00000	6279-0	94,318.50	15,958.69	7,686.96	15,000.00	471.59	133,435.74	
Account Totals	# of Employees 1				214,690.62	36,325.69	13,895.46	26,575.60	471.59	291,958.96	
		# of Vacancy 1									