Oakland Military Institute, College Preparatory Academy

Regular Board Meeting

Published on November 16, 2026 at 1:23 PM PST
Amended on November 16, 2026 at 2:55 PM PST

Date and Time

Thursday November 19, 2026 at 4:00 PM PST

Location

Address: 3877 Lusk St. Oakland, CA 94608

Room: B104, B Side Building

In response to the expiration of Governor Newsom's Executive Order N-29-20, which temporarily suspended provisions of the Brown Act relating to public meetings, the Board will resume in-person board meetings.

In Compliance with the Americans with Disabilities Act, those requiring special assistance to access the board meeting should contact Carlos Rodriguez at crodriguez@omiacademy.org. Notifications of at least 24 hours prior to the meeting will enable Oakland Military Institute to make reasonable arrangements to ensure accessibility to the board meeting.

Agenda

		Purpose	Presenter	Time
I.	**Open Session**			

		Purpose	Presenter	Time
II.	**Opening Items**			**4:00 PM**
A.	Roll Call			
B.	Call the Meeting to Order CALL TO ORDER: The Chairman of the Governing Board of Directors will call the Oakland Military Institute College Preparatory Academy meeting to order at 4:00 PM, or as soon thereafter as possible.			
C.	Public Comment INVITATION TO ADDRESS THE BOARD: Non-Agenda, Agenda, and Closed Session items. Summary: The Board encourages public comment concerning any item of importance and will recognize requests to speak before the item is discussed or voted upon. To assure your rights to address any action item, please notify the Executive Director's Office of your desire to speak by noon the day prior to the Board Meeting; however, we will also make comment cards available at the podium. Those requesting to address the Board will have a total of two (2) minutes. The Board encourages public comment concerning any item of importance and will recognize requests to speak on items not appearing on the Agenda. Speakers should be aware that the Board members are not permitted to comment on the issues they raise, but may request those items to be properly agendized for inclusion in the discussion at a future meeting. If anyone has any questions or concerns, please contact the Executive Assistant to the Superintendent/Commandant Liaison Mr. Carlos Rodriguez at crodriguez@omiacademy.org.			3 m
D.	Ordering of the Agenda			
III.	**Approval of Consent Items**			**4:03 PM**
A.	Minutes of August 27, 2026 Board Meeting	Approve Minutes	Carlos Rodriguez	1 m
B.	Personnel Report		Kathryn Wong	1 m

		Purpose	Presenter	Time
C.	New Contracts		CMSgt (CA) Thomas James	3 m
IV.	**Items**			**4:08 PM**
A.	Approve First Interim Budget Report (Financial Update)	Vote	Jessika Welcome	10 m
B.	Consideration of Employee Cost of Living Allowance for 2026-2027 (COLA)	Vote	Jessika Welcome	5 m
C.	Superintendent's Contract	Vote		5 m
D.	Approve Main Audit + Measure G1 Audit Report	Vote	Kyle Holtz	5 m
E.	High Impact Tutor Model Update & Core Growth result for 2026	FYI	Zandra Texeira	5 m
F.	2026-2027 Williams Monitoring Facilities Report	FYI	CMSgt (CA) Thomas James	2 m
G.	BP 5144.1 - Honor Board and Military-Standards Dismissal	Vote		5 m
H.	AB 2519 - CalSTRS Membership Position Review	FYI		5 m
V.	**Cadet Commander's Report**			**4:50 PM**
A.	Cadet Commander Report			3 m
VI.	**Superintendent's Update**			**4:53 PM**

Dr. Streshly will provide the OMI Board with an update on the following items:

- Renewal Timeline Update: Initial Public Hearing debrief (attached hearing slides), Staff report and Decision Hearing
- December Staff of the Year Ceremony on Dec 10th board meeting
- Dual Enrollment & Cal Poly Maritime Partnership Update
- CMVC 531 Amended

		Purpose	Presenter	Time
A.	Initial Public Hearing Slides			

VII. Board Member Comments

VIII. Closing Items **4:53 PM**

A.	Adjourn Meeting	Discuss	Jerry Brown	1 m

Coversheet

Minutes of August 27, 2026 Board Meeting

Section: III. Approval of Consent Items
Item: A. Minutes of August 27, 2026 Board Meeting
Purpose: Approve Minutes
Submitted by: Carlos Rodriguez
Related Material: Minutes for Regular Board Meeting on August 27, 2026

BACKGROUND:

The Oakland Military Institute (OMI) College Preparatory Academy held a Regular Board Meeting on August 27, 2026.

RECOMMENDATION:

The OMI Board of Directors approves the attached minutes for the Regular Board Meeting held on August 27, 2026.

DRAFT

Oakland Military Institute, College Preparatory Academy

Minutes

Regular Board Meeting

Date and Time
Thursday August 27, 2026 at 4:00 PM

Location
Address: 3877 Lusk St. Oakland, CA 94608

Room: B104, B Side Building

In response to the expiration of Governor Newsom's Executive Order N-29-20, which temporarily suspended provisions of the Brown Act relating to public meetings, the Board will resume in-person board meetings.

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Directors Present
B. Cross, D. Clisham, J. Brown, M. Mares, S. Bryce

Directors Absent
A. Campbell Washington, J. Wire

Directors who arrived after the meeting opened
J. Brown

Guests Present
5 other participants, C. James, C. Rodriguez, J. Pike, J. Welcome (remote), K. Wong, M. Streshly, M. Traver, S. Lipsey, Z. Texeira

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I. Opening Items

A. Roll Call

B. Call the Meeting to Order

M. Mares called a meeting of the board of directors of Oakland Military Institute, College Preparatory Academy to order on Thursday Aug 27, 2026 at 4:11 PM.
J. Brown arrived at 4:28 PM.

C. Public Comment

No public comments at this board meeting.

D. Ordering of the Agenda

S. Bryce made a motion to change the order of the agenda based on the direction of the board members present. Cadet presentation first.
B. Cross seconded the motion.
The board **VOTED** to approve the motion.

II. Cadet Commander's Report

A. Cadet Commander Report

Cadet S. Bymaster gave the presentation.

He explained that there was a similar number of cadets who started entrance camp this year compared to last year. 144 passed entrance camp. 12 of the 13 candidates who had to do alternative camp passed.

OMI has a goal of having all of the graduating class be cadet sergeants or higher, and as of the meeting, 49 of 51 cadets achieved this goal.

10 cadet tutors are coming back. Dr. Streshly mentioned that Governor Brown is willing to provide incentive compensation to the highest-performing tutors.

III. Approval of Consent Items

A. Minutes of June 11, 2026 Board Meeting

M. Mares made a motion to approve the minutes from Regular Board Meeting on 06-11-26.
S. Bryce seconded the motion.
The board **VOTED** to approve the motion.

B. Personnel Report

M. Mares made a motion to approve personnel report.
S. Bryce seconded the motion.
Mr. Mares asked about the vacant campus supervisor position and the safety of the campus. Dr. Streshly explained that OMI is covered by three full-time campus supervisors and administrative staff doing campus monitoring.
The board **VOTED** to approve the motion.

C. New Contracts

M. Mares made a motion to approve new contracts.
S. Bryce seconded the motion.
Mr. Mares mentioned SVMI and wondered how long the relationship would be. Dr. Streshly explained that there has been internal discussion of moving away from SVMI, but the teachers wanted the coaching. One more year and taper off.
The board **VOTED** to approve the motion.

D. NCS Designated Coordinator

M. Mares made a motion to approve the NCS Designated Coordinator.
S. Bryce seconded the motion.
The board **VOTED** to approve the motion.

IV. Superintendent's Update

A. Superintendent Update

These are estimated windows during which the admin can review data and submit our charter renewal application. OMI Staff would like to use the 2026 data. CAASPP results jumped significantly in the 2026 data.

The recommendation and decision are expected by January of 2027.

OMI was awarded the 2026-2027 CTEIG grant of $526,000.

V. Items

A. Financial Update

Jessika mentioned that at the last board meeting, it was expected that OMI would end the year with $257,013 in ending fund balance, but it ended with $460,004 instead. There

was a shift of multi-year revenue to the next year. The actual expenses are coming in this year, so Jessika moved the revenue to match the expenses.

Everything that was in the May revise is in the final state budget.

Jessika mentioned that the OMI started the school year off with more cadets than what was estimated and OMI received the CTEIG grant.

B. Approve SACS Unaudited Actuals Report

M. Mares made a motion to approve SACS Unaudited Actuals Report.
S. Bryce seconded the motion.
The board **VOTED** to approve the motion.

C. Approve Board Policy Revision: Conflict of Interest

M. Mares made a motion to approve conflict of interest.
S. Bryce seconded the motion.
The board **VOTED** to approve the motion.

D. Authorization of Funds Transfer to Certificate of Deposit Account

CMSgt (CA) James asked for direction to work with Jessika and Dr. Streshly to move funds into OMI's two CD accounts.

E. Conversion, Camp, and Enrollment Summary

MSG Traver mentioned that this year, he and his team committed a good amount of time to phone banking to increase conversion from application to candidate to cadet. He received help from cadet leaders as well during entrance camp and the lead-up to that.

He explained that Oakland Enrolls is bringing the enrollment window up a month to October and ending in mid-February.

Retention of current cadets was 92% or higher for all grades except 9th. That is due to some cadets wanting to go to a traditional high school.

Jerry Brown asked how the social media and internet advertisements affected the total number of applicants. MSG Traver explained that it is good to get OMI's brand out there, but word of mouth was the best form of recruiting over social media.

F. CAASPP Result Summary and 26-27 Math and Literacy Plan

Math made huge growth. To continue improvements, steps will be taken to continue raising the scores in both ELA and math. OMI has been making growth every single year, even when the statistics look stagnant. Some of the cadets in levels 1 and 2 are moving

Oakland Military Institute, College Preparatory Academy Regular Board Meeting Minutes - Thursday, August 27, 2020 at 4:00 PM

up within the levels; that is why it looks like nothing has changed, but there is improvement.

Cadets who scored a 4 were placed in Honors English for middle school. The cadets who scored 1 or 2 were placed in Academic Success classes for further help.

Mr. Mares asked if the higher-scoring cadets could be put in a tutoring elective so the cadets get accustomed to the correct way to help tutor other cadets.

G. OMI Charter Renewal Application + Performance Report

M. Mares made a motion to charter renewal.
S. Bryce seconded the motion.
The board **VOTED** to approve the motion.

H. Excess Property Disposition - Van Sale Request

M. Mares made a motion to van sale request.
S. Bryce seconded the motion.
The board **VOTED** to approve the motion.

VI. Board Member Comments

A. Board Member Comments

Mr. Mares asked about wrapping the vans with OMI logo. CMSgt James mentioned that there is a potential for a more discreet wrapping that could involve just the logo.

VII. Adjourn to Closed Session

A. Adjourn to Closed Session

S. Bryce made a motion to adjourn to closed session.
M. Mares seconded the motion.
5:16 pm: The board of directors djourned to closed session.
The board **VOTED** to approve the motion.

VIII. Reconvene to Open Session

A. Reconvene to Open Session

S. Bryce made a motion to reconvene to open session.
M. Mares seconded the motion.
5:24 pm: The board of directors reconvened to open session.

No action was taken in the closed session.
The board **VOTED** to approve the motion.

Oakland Military Institute, College Preparatory Academy Regular Board Meeting Minutes - Thursday, August 27, 2020 at 4:00 PM

IX. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 5:25 PM.

Respectfully Submitted,
J. Brown
M. Mares made a motion to adjourn at 5:25 pm.
S. Bryce seconded the motion.
The board **VOTED** to approve the motion.

Coversheet

Personnel Report

Section: III. Approval of Consent Items
Item: B. Personnel Report
Purpose:
Submitted by: Kathryn Wong
Related Material: Staff Changes 2026-2027 - Civilian.pdf
Staff Changes 2026-2027 - Military Aug 18 to Nov 30, 2026.pdf

BACKGROUND:

The Oakland Military Institute (OMI) College Preparatory Academy charter requires that the Board of Directors approve all personnel transactions based on the recommendation of the Superintendent. Please find attached all personnel changes since our last board meeting on August 27, 2026.

RECOMMENDATION:

The Superintendent and the Human Resources Manager recommend that the OMI Board approve the personnel report in the attached document.

Oakland Military Institute (OMI) College Preparatory Academy School Staff as of August 18, 2026-November 10, 2026						
New Hire:						
Last Name	**First Name**	**Job Title Description**		**FTE**		**Start Date / Separation Date:**
Ballard	Charles	High School Volleyball Coach		0.05		8/26/2026
Banks	Asha	Math Tutor		0.4		10/13/2026
Brown	Indira	Substitute Teacher		1		9/14/2026
Castro-Gordo	Alvaro	Bilingual Aide		1		10/1/2026
Davis	Roseine	High School Girls Basketball Coach		0.05		9/19/2026
Deering	Jennifer	Middle School Science Teacher/ Athletic Director/ Health Ed		1		10/19/2026
Joshua	Rashwan	High School Boys Basketball Coach and Math Tutor		1		9/19/2026
Kane	Julia	Cross Country Coach		0.05		8/21/2026
Manriquez	Iris	High School Wrestling Coach		0.05		9/9/2026
Ntah	Yemeli	Math Tutor		1		10/13/2026
Neishi	Samia	Substitute Teacher		1		8/14/2026
Serenil	Gabriel	Math Tutor		1		10/13/2026
Simoncini	Francisco	High School Boys Soccer Coach		0.05		8/3/2026
Taplin	Marcus	ASP Aide		1		9/9/2026
Woolridge	Michael	Middle School Flag Football Coach (Boys and Girls)		0.05		8/3/2026
Wyman	Christopher	Math Tutor		1		10/1/2026
Transfers:						
Last Name	**First Name**	**Job Title Description**	**New Title**	**OLD FTE**	**New FTE**	
Mena	Jose	Bilingual Aide	Campus Monitor	1	1	10/2/2026
Yip	Kelsey	Math Tutor	College and Career Counselor	1	1	11/2/2026
Separations:						
Last Name	**First Name**	**Job Title Description**				**Date:**
Kaul	Neha	Middle School Science and Biology Teacher				10/16/2026
Barroso	Monique	College and Career Counselor				10/21/2026
Teacher/Staff Vacancies:			**Open Date**			
		SPED Teacher		1		
		Middle School Science and Biology Teacher		1		
		Substitute Teacher		1		
		Math Tutor		3		
		Literacy Interventionist		2		

Oakland Military Institute (OMI) College Preparatory Academy School Staff as of August 19, 2026 to November 30, 2026						
New Hire:						
Last Name	**First Name**	**Job Title Description**		**FTE**		**Start Date / Separation Date:**
Sanchez	Ivan	TAC NCO				10/12/2026
Transfers:						
Last Name	**First Name**	**Job Title Description**	**New Title**	**OLD FTE**	**New FTE**	
Caro	Anthony	TAC NCO	Operation & Support Section Chief			10/1/2026
Separations:						
Last Name	**First Name**	**Job Title Description**				**Date:**
Furlough						
Mullins	Nathan	TAC NCO				11/25/2026

Coversheet

New Contracts

Section: III. Approval of Consent Items
Item: C. New Contracts
Purpose:
Submitted by: CMSgt (CA) Thomas James
Related Material:
Independent Contractor Agreement 1099 Nicole Stephenson (1).pdf
OMI Cooperative Agreement_2026_2027_Gov Ready.pdf
base_alameda_PIE_OMI_executed (1).pdf
SELF PROGRAM SERVICES AGREEMENT - OAKLAND MILITARY INSTITUTE COLLEGE PREP ARATORY ACADEMY.pdf

BACKGROUND:

In accordance with the recent fiscal policy approval regarding the superintendent's contract approval authority expansion of "up to $100,000" during the June 25, 2025, board meeting, the OMI Board of Directors must approve all contracts for services over $100,000 and ratify contracts under $100,000.

Attached you will find:

Contract #1: Nicole Stephenson IC

Contract #2: Cooperative Agreement

Contract #3: Partnership in Education

Contract #4: SELF

Contract #5:

Contract #6:

Contract #7:

Contract #8:

INDEPENDENT CONTRACTOR AGREEMENT
BETWEEN
OAKLAND MILITARY INSTITUTE AND NICOLE STEPHENSON

This Agreement is made between the Oakland Military Institute ("OMI"), a California non-profit corporation with its principal place of business at 3877 Lusk St., Oakland, CA 94608, and Nicole Stephenson ("Independent Contractor").

It is the desire of OMI to engage the services of an Independent Contractor. Such services and the relationship between OMI and Independent Contractor shall be governed according to the following terms and conditions:

SECTION 1. SERVICES TO BE PERFORMED. Independent Contractor agrees to perform the services detailed in **Attachment A** on OMI's behalf.

SECTION 2. PAYMENT. In consideration for the services to be performed by Independent Contractor, OMI agrees to pay Independent Contractor at the rate of $125.00 per hour, not to exceed 20 hours, or $2,500.00, approximately 2 hours a day for the term of this Agreement. The span of minimum availability is from the execution of this contract on October 22, 2026. Tasks are to be determined by the superintendent in collaboration with the contractor.

The contractor will submit an invoice once per month at the end of the month for payment within 15 days.

SECTION 3. EXPENSES. Independent Contractor shall be responsible for all expenses incurred while performing services under this Agreement, including meals, lodging, and transportation. However, OMI shall reimburse Independent Contractor for all reasonable and approved out-of-pocket expenses necessarily incurred in connection with the performance of services under this Agreement as long as OMI administration pre-approve expense estimates. Independent Contractor shall submit an itemized statement of such expenses. OMI shall pay Independent Contractor within thirty (30) days from the date of each statement.

SECTION 4. MATERIALS. Independent Contractor will furnish all materials, equipment and supplies used to provide the services required by this Agreement.

SECTION 5. CONDITIONS OF INDEPENDENT CONTRACTOR SERVICES. As a condition of Independent Contractor being selected to provide the services detailed in **Attachment A**, Independent Contractor shall provide OMI with the following documents and Standard of Care:

- ☐ Copy of qualifications, including resume, credential, license(s), or certification for Independent Contractor as they relate to the services provided under **Attachment A**;
- ☐ W-9.

STANDARD OF CARE.

5.1 Contractor has the qualifications and ability to perform the Services in a professional manner, without the advice, control or supervision of OMI staff.

5.2 Contractor's Services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of its profession for services to California school districts. Contractor's Services will be performed with due care and in accordance with applicable law, code, rule, regulation, and/or ordinance.

5.3 Contractor hereby represents that it possesses the necessary professional capabilities, qualifications, licenses, skilled personnel, experience, expertise, and financial resources, and it has available and will provide the necessary equipment, materials, tools, and facilities to perform the Services in an efficient, professional, and timely manner in accordance with the terms and conditions of the Agreement.

5.4 Contractor shall be responsible for the professional quality, technical accuracy, completeness, and coordination of the Services, and Contractor understands that the District relies upon such professional quality, accuracy, completeness, and coordination by Consultant in performing the Services.

Section 6. Intellectual Property Ownership. Independent Contractor assigns to OMI all patent, copyright and trade secret rights in anything created or developed by Independent Contractor for OMI under this Agreement. This assignment is conditioned upon full payment of the compensation due Independent Contractor under this Agreement. Independent Contractor shall help prepare any documents OMI considers necessary to secure any copyright, patent, or other intellectual property rights at no charge to OMI. Independent Contractor agrees to honor the proprietary information of OMI and shall not disclose or circumvent such proprietary information now or in the future. Upon the conclusion of this Agreement, the Independent Contractor shall return all records, files, contacts and other proprietary information of OMI to OMI. However, OMI shall reimburse Independent Contractor for all reasonable actual expenses necessary to carry out the terms of this Section.

Section 7. Term of Agreement. This agreement will become effective when signed by both parties and will terminate the date either party terminates the Agreement as provided below, or on June 30, 2026, whichever occurs earlier.

Section 8. Terminating the Agreement. During the term of this Agreement, either party may terminate the Agreement without cause or advance notice at any time by providing written notice to the other party.

This Agreement terminates automatically on the occurrence of any of the following events: (a) the bankruptcy or insolvency of either party; (b) sale of business of either party; or (c) the death or permanent disability of either party; (d) material breach of any term or condition of this Agreement; or (e) revocation or nonrenewal of the OMI charter.

Section 9. Independent Contractor Status. Independent Contractor is an independent contractor, not an employee of OMI. Independent Contractor's employees or subcontractors are not OMI's employees. Independent Contractor and OMI agree to the following rights consistent with an independent contractor relationship:

(a) Independent Contractor has the right to perform services for others during the

term of this Agreement.

(b) Independent Contractor has the sole right to control and direct the means, manner and method by which the services required by this Agreement will be performed to the extent the provision of Independent Contractor's services are consistent with the responsibilities set forth herein at **Attachment A** as dictated by OMI.

(c) Independent Contractor shall perform the services required by this Agreement; OMI shall not hire, supervise or pay any assistants to help Independent Contractor.

(d) Independent Contractor shall not receive any training from OMI in the skills necessary to perform the services required by this Agreement.

(e) OMI shall not require an Independent Contractor to devote full time to performing the services required by this Agreement.

(f) Independent Contractor is not eligible to participate in any employee pension, health, vacation pay, sick pay or other fringe benefit plan of OMI.

Section 10. Workers' Compensation. OMI shall not obtain workers' compensation insurance on behalf of Independent Contractor or Independent Contractor's employees.

Section 11. Local, State and Federal Taxes. Independent Contractor is responsible for tax compliance and shall pay all income taxes as well as FICA (Social Security and Medicare taxes) incurred while performing services under this Agreement. OMI will not:

(a) Withhold FICA from Independent Contractor's payments or make FICA payments on Independent Contractor's behalf;

(b) Make state or federal unemployment compensation contributions on Independent Contractor's behalf; or

(c) Withhold state or federal income tax from Independent Contractor's payments.

If an Independent Contractor is required to pay any federal, state or local sales, use, property, or value added taxes based on the services provided under this Agreement, the taxes shall be separately billed to OMI. Independent Contractor shall not pay any interest or penalties incurred due to late payment or nonpayment of any taxes by OMI.

Section 12. Confidentiality. Independent Contractor acknowledges that during the engagement it will have access to and become acquainted with various trade secrets, inventions, innovations, processes, information, records and specifications owned or licensed by OMI and/or used by OMI in connection with the operation of its business including, without limitation, OMI's business and product processes, methods, pupil/personnel record information, accounts and procedures. All information regarding students of OMI will remain confidential to the Independent Contractor unless a separate, specific, properly executed consent (including permission from OMI's student and his or her parent) for the release of information is obtained prior to such release. Any information regarding student(s) received by OMI's personnel or Independent Contractor providing services pursuant to this Agreement shall remain confidential

and shall not be communicated to any person or entity other than appropriate OMI personnel.

Section 13. Exclusive Agreement. This is the entire Agreement between Independent Contractor and OMI. All previous agreements between the parties, if any, whether written or oral, are merged herein and superseded hereby.

Section 14. Modifying the Agreement. This Agreement may be supplemented, amended, or modified only by the mutual agreement of both parties. No modification of this Agreement shall be binding unless in writing and expressing an intent to modify the Agreement and signed by both parties.

Section 15. Dispute Resolution. If a dispute arises under this Agreement, the parties agree to first try to resolve the dispute with the help of a mutually agreed-upon mediator. Any costs and fees other than attorneys' fees associated with the mediation shall be shared equally by the parties. If it proves impossible to arrive at a mutually satisfactory solution through mediation, the parties agree to submit the dispute to a mutually agreed-upon arbitrator in Alameda County. Judgment upon the award rendered by the arbitrator may be entered in any court having jurisdiction to do so. Costs of arbitration, including attorneys' fees, will be allocated by the arbitrator.

Section 16. Limited Liability. This provision allocates the risks under this Agreement between Independent Contractor and OMI. Independent Contractor's pricing reflects the allocation of risk and limitation of liability specified below. However, Independent Contractor shall remain liable for bodily injury or personal property damage resulting from grossly negligent or willful actions of Independent Contractor or Independent Contractor's employees or agents while on OMI's premises to the extent such actions or omissions were not caused by OMI. NEITHER PARTY TO THIS AGREEMENT SHALL BE LIABLE FOR THE OTHER'S LOST PROFITS, OR SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES, WHETHER IN AN ACTION IN CONTRACT OR TORT, EVEN IF THE PARTY HAS BEEN ADVISED BY THE OTHER PARTY OF THE POSSIBILITY OF SUCH DAMAGES.

Section 17. Liability and Indemnification. With regard to the services to be performed by the Independent Contractor pursuant to the terms of this Agreement, OMI shall not be liable to the Independent Contractor, or to anyone who may claim any right due to any relationship with the Independent Contractor, for any acts or omissions of OMI, except when said acts or omissions of OMI are due to willful misconduct or gross negligence. Independent Contractor shall hold OMI free and harmless from any obligations, costs, claims, judgments, attorneys' fees, and attachments arising from or growing out of the services rendered by Independent Contractor pursuant to the terms of this agreement or in any way connected with the rendering of services, except when the same shall arise due to the willful misconduct or gross negligence of OMI and OMI is adjudged to be guilty of willful misconduct or gross negligence by a court of competent jurisdiction.

Section 18. Notices. All notices and other communications in connection with this Agreement shall be in writing and shall be considered given as follows:

(a) When delivered personally to the recipient's address as stated on this Agreement;

(b) Three days after being deposited in the United States mail, with postage prepaid to the recipient's address as stated on this Agreement, or

(c) When sent by fax to the last fax number of the recipient known to the person giving notice.

Notice is effective upon receipt provided that a duplicate copy of the notice is promptly given by first class mail, or the recipient delivers a written confirmation of receipt.

If to Independent Contractor:	If to OMI:
Nicole Stephenson	Attn: Dr. Mary Streshly
4345 Briercrest Avenue	3877 Lusk Street
Lakewood CA 90713	Oakland CA 94608
nicoledenise11@hotmail.com	mstreshly@omiacademy.org
(562) 441-9594	(510) 594-3983

SECTION 19. NO PARTNERSHIP. This Agreement does not create a partnership relationship. Neither party has authority to enter into contracts on the other's behalf.

SECTION 20. INTERPRETATION AND OPPORTUNITY FOR COUNSEL. In the event of a controversy or dispute between the parties concerning the provisions herein, this document shall be interpreted according to the provisions herein. The parties hereto acknowledge and agree that each has been given an opportunity to independently review this Agreement with legal counsel.

SECTION 21. APPLICABLE LAW. This Agreement will be governed by the laws of the State of California.

Appendix A

Scope of Services

Description of Responsibilities and Projects

1. Support requests from the Superintendent, CSMSgt James, and Mark Basnage.
2. Support in applying for a CTE credential
3. Keep records of all candidates and next steps.
4. Share information with the HR Department.
5. Maintain a professional appearance and demeanor at all times.
6. Other duties as assigned

Signatures:

On Behalf of OMI:

Signed by:
Mary Streshly
912ADA436406453...

Dr. Mary Streshly

Superintendent, Oakland Military Institute

Date: 10/22/2026

Independent Contractor:

Signed by:
NICOLE STEPHENSON
92A00C7A60B3440...

Nicole Stephenson

Independent Contractor

Date: 10/22/2026

COOPERATIVE AGREEMENT
BY & BETWEEN
THE CALIFORNIA MILITARY DEPARTMENT
AND
THE OAKLAND MILITARY INSTITUTE
COLLEGE PREPARATORY ACADEMY

I. General: In accordance with the California Military and Veterans Code, Section 531:

CMVC 531: The Adjutant General may enter into a cooperative agreement with the City of Oakland and a school district to establish Oakland Military Institute College Preparatory Academy (OMI). OMI's educational program would provide a structured, disciplined environment that would be conducive to learning in a college preparatory environment. In addition to academic skills, pupils would develop leadership, self-esteem, and a strong sense of community.

This Cooperative Agreement is executed by and between the California Military Department (CMD) and the Board of Directors (BOD) of OMI ("the Parties").

II. BACKGROUND: OMI was founded in 2001 by the then Oakland Mayor Jerry Brown. It was the first charter school ever sponsored by the state, the first public military school, and the first school sponsored by the National Guard. OMI operates in partnership with the CMD Youth and Community Programs Task Force (YCPTF) and the OMI BOD. OMI College Preparatory Academy's mission is to prepare cadets to qualify for and succeed in leading colleges and universities. OMI inculcates honor, integrity, and leadership through a traditional military school framework. OMI is located at 3877 Lusk Street, Oakland, CA 94608.

III. TERM: The term of the agreement shall be from July 1st, 2026, until June 30th, 2027.

IV. GOVERNANCE: The Military Department and the OMI BOD agree that the goal of the program is the matriculation of graduates the program is the matriculation of graduates into institutions of higher learning. The CMD and OMI BOD agree that the BOD shall be the entity managing OMI. The formula by which the Commandant is appointed shall be determined in the bylaws of the Oakland Military Institute.

V. RESPONSIBILITIES AND FUNDING REQUIREMENTS OF THE OMI BOARD OF DIRECTORS: The OMI BOD shall act in all ways consistent with applicable local, state, and federal laws and with the terms of the charter as approved by the Oakland Unified School District Board of Education. The following are the responsibility of the OMI BOD:

1) Secure and maintain facilities to house OMI, including:
   a. Negotiations and funding arrangements for specified renovations to the facility.
   b. Negotiations and funding arrangements to keep the facility in accordance with local codes and regulations.
   c. Negotiations and funding arrangements for any rent or lease costs for the

facility.

2) Provide for any needs of OMI not specifically funded or authorized in the Governor's budget to the CMD or appropriated to OMI by the State of California through the Department of Education.

3) Provide leadership, direction and take overall responsibility for all fundraising efforts initiated by OMI.

4) Provide leadership, direction, and overall responsibility for the educational program at OMI, including hiring a superintendent, chief academic officer (CAO), teachers, and support staff with charter school Local Control Funding Formula funding appropriated by the State of California.

5) Work in good faith with the CMD to develop a long-term strategic plan for the operation and funding of OMI.

6) Document and track all reimbursable expenditures and submit requests for payment via invoice to CMD monthly, supported by general ledger detail or financial activity report.

7) Coordinate and provide all transportation needs of cadets for OMI functions and CMD approved field trips.

VI. RESPONSIBILITIES AND REQUIREMENTS OF CMD: The CMD shall act in all ways consistent with local, state, and federal laws and with the terms of the charter as approved by the Oakland Unified School District. The following are the responsibility of the CMD;

1) Provide funding for OMI authorized annually in the Governor's budget to support the Military Department's role in OMI. The Commandant will oversee all aspects of the Military Science department, business services, and military components. This funding is subject to Military Department approval as necessary.

2) In consultation with the Commander, Youth and Community Programs Task Force, the OMI BOD or representative, and the CMD General Officer Executive Personnel Council (GOEPC), CMD shall appoint the Commandant as the Senior Level CMD school Representative. The selecting supervisor for all other CMD personnel at OMI is the CMD OMI Commandant in consultation with the OMI BOD or designated representative.

3) CMD will assign and pay for a CMD OMI Commandant, and military cadre as provided in the CMD budget salary funds for OMI.

4) The CMD OMI Commandant is the Commander of Troops at OMI. The CMD OMI Commandant is responsible for providing OMI with a military environment and training program that will:
    a. Develop leadership traits in students.
    b. Emphasize teamwork by students.
    c. Foster student physical fitness.

d. Reinforce life skills and promote the likelihood of future success.
e. Instill self-discipline in students with respect to their studies and overall behavior.

5) The CMD OMI Commandant facilitates the military science program at OMI and reports directly to the BOD for Tactical Control (TACON), which involves the daily activities at the school.

   a. The Commandant also reports to the Commander of the Youth and Community Programs Task Force for Administrative Control (ADCON). The Commandant is tasked with accomplishing the mission and seamlessly integrating the military science program into OMI's overall academic course offerings.

6) The CMD OMI Commandant shall facilitate CMD personnel's successful operation and integration into OMI. The CMD OMI Commandant will allocate CMD personnel in accordance with CMD Position Descriptions (CMD Form 900-13).

7) The CMD OMI Commandant and OMI Superintendent are expected to work collaboratively on all OMI-related duties and activities. When differences cannot be resolved internally, the matter will be referred to the Commander of the YCPTF, OMI BOD, or designee for resolution. When differences occur that cannot be resolved at the Commander, YCPTF, and OMI BOD or designee level, the matter will be referred to the Adjutant General or designee for final resolution.

8) OMI Instructors/personnel/Cadre will provide a Military Science curriculum derived from the California Cadet Corps (CACC) pacing guide but adjusted whenever necessary to achieve the academic and leadership goals inherent in OMI's unique mission. OMI Commandant and OMI Superintendent will subsequently agree to curriculum placement which may include Military Science periods.

9) CMD personnel shall be designated as Certificated or Classified. Certificated CMD personnel shall possess a valid Credential issued by the California Commission on Teacher Credentialing (CCTC) required for their certificated assignment, while Classified personnel do not possess a valid Credential issued by CCTC. All CMD instructional staff shall obtain a California Teaching CTE credential in accordance with the California Education Code within three years of their hire date. Exceptions to the required timeframe will be subject to approval by the OMI Superintendent.

10) All CMD personnel Position Descriptions (CMD Form 900-13) will be provided to OMI upon request.

    a. CMD is responsible for approving and updating all CMD Position Descriptions (CMD Form 900-13) to include duties, responsibilities, and essential functions in accordance with CMD policies and regulations.
    b. CMD staff will be assigned duties consistent with their CMD Position Description (CMD Form 900-13).
    c. CMD personnel may be required to support faculty through a Co-Teaching

program intended to increase cadet one-on-one assistance and tutoring. In the event of a teacher shortage, the OMI administration will try to locate credentialed substitute teachers. As a last result, the OMI cadre may be assigned to teach if agreed to by both OMI Commandant and OMI Superintendent.

d. Unless due to extenuating circumstances, including but not limited to the health and safety of staff and students, any request or directive to utilize CMD personnel outside of their prescribed duties, responsibilities, and essential functions in accordance with the Position Description (CMD Form 900-13) will be made in writing to the OMI Commandant at least two weeks before the implementation of the request.
e. Approved requests/changes to CDM Position Descriptions (CMD Form 900-13) shall not be permanent unless CMD agrees to update and change the duties, responsibilities, and essential functions listed for the CMD Position Description in accordance with CMD policies and regulations.
f. The CMD OMI Commandant and OMI Superintendent will work collaboratively before each semester to determine the assignments of each CMD instructor.

11) The CMD OMI Commandant shall forecast and provide the OMI Superintendent with known shortages of CMD personnel due to Individual Training and annual training commitments at least four (4) months before scheduled events that facilitate less than optimal staffing levels.

12) The CMD OMI Commandant, together with OMI administrators, will endeavor and make all reasonable efforts to maintain optimal staffing levels that support a thirty (30) to one (1) student-to-cadre ratio.

13) When CMD personnel are absent due to military or personal obligations resulting in long and short-term sub-optimal staffing levels above the prescribed thirty (30) to one (1) student-to-cadre ratio. CMD and OMI will work together to mitigate shortfalls by utilizing all available resources/requests at their disposal to facilitate a safe and optimal teaching environment for students, cadre, and teachers.

14) CMD has determined that “standards of conduct required by the Military Department,” as that term is used in Education Code Section 47605(e)(5), are defined as Cadet Standards of Conduct, pursuant to the March 10, 2020 Memorandum For Service Members and Employees of the Youth & Community Programs Task Force signed by Brigadier General Cross, which attaches and incorporates by reference the February 12, 2020 Cadet Standards of Conduct, signed by Major General Baldwin, as those documents are attached to this Agreement as Appendix 1.

15) CMD shall use funds authorized in the Governor's annual budget to procure, on behalf of OMI, items a through f:

a. Uniforms and all related accessories, including alterations and embroidery;
b. Training aids, supporting goods, bivouac equipment, marksmanship and archery supplies, obstacle course structures, and maintenance;

c. Military parade accessories include flags, poles, guidons, banners, trumpets, and color guard equipment;
d. Military awards and decorations;
e. Supply room furnishings, equipment, and administrative supplies;
f. Technology needs, emergency medical equipment, radios and accessories, and portable public announcement systems;

VII. AUTHORITY INVOLVING PERSONNEL MATTERS: OMI and CMD shall comply with all applicable local, state, and federal laws, OUSD Board Policies, CMD Policies and Regulations, and the OMI Charter, and shall:

1) Initial appointment and separation of CMD personnel shall comply with CMD policy and regulation. The selecting supervisor for appointments of CMD personnel is the CMD OMI Commandant. When a mutually acceptable resolution regarding the initial appointment of CMD personnel cannot be reached, the decision of the Commander YCPTF in consultation with the OMI BOD or designee shall be final.

2) On or before July 1st of each school year, the CMD OMI Commandant will provide a complete list of CMD personnel via e-mail to the OMI Superintendent. The list will include the name, rank, and assignment at OMI. Any changes will be similarly communicated within ten (10) days.

3) CMD personnel shall comply with all norms established for meetings, communication, community interactions, instruction, discipline, and reporting structures in accordance with the OMI Charter.

4) If OMI, BOD, or OUSD representatives have any concern surrounding the well-being or safety of its students, staff, facilities, or programs, the OMI BOD or designated representative may immediately order the removal of any CMD personnel from its facilities and events, temporarily or on a permanent basis.

5) OMI BOD or designated representative may immediately remove or order the removal of or deny access to facilities and events to CMD personnel who fail to adhere to all OMI rules, regulations, and policies, including but not limited to satisfying the fingerprinting requirement as provided in Education Code Section 45125.1, and all health and safety requirements requested by OMI.

6) Within (10) days of an order/action to remove or deny an individual or group of CMD personnel access to OMI facilities and events (as cited in paragraph 4 or 5 above), OMI will provide written notification detailing the issues, violations, or reasons to the YCPTF Commander.

7) Following written notification to the CMD OMI Commandant, the OMI administration shall have the right to question CMD personnel regarding formal student, parent, and staff complaints and the resulting investigations. The CMD OMI Commandant or CMD designated representative shall have the right to be present during any OMI administration questioning of CMD personnel regarding formal student, parent, and staff complaints and the resulting investigations.

8) In the event of performance and or conduct concerns that may lead to the discipline of CMD personnel, OMI shall provide a written notice detailing concerns, issues, or complaints to the CMD OMI Commandant.

    a. The CMD OMI Commandant or YCPTF Designee shall meet with CMD personnel to investigate and document any reported concerns, issues, or complaints.
    b. The CMD OMI Commandant or a YCPTF Designee may work with the OMI Superintendent or OMI BOD designee to resolve concerns, issues, or complaints involving CMD personnel and any of the accompanying disciplinary actions that may be warranted.
    c. The resolution of concerns, issues, or complaints may be shared with the OMI Superintendent or OMI BOD representative through a detailed Memorandum for Record to ensure all areas identified by OMI were addressed, including specific actions taken to address performance or conduct issues.
    d. CMD shall be provided a copy of any final investigative report by OMI regarding any complaint of performance or conduct concerns that may lead to the discipline of CMD personnel. OMI may be provided a copy of any final investigative report by CMD regarding any complaint of performance and or conduct concerns that may lead to the discipline of CMD personnel pending the Office of the Staff Judge Advocate approval in accordance with Army Regulation 27-40 or Air Force Instruction 51-301.

9) CMD Instructors/personnel working in an instructional capacity may be subjected to informal walkthroughs and observations by OMI administrators, Instructional Coaches, and Consultants. Instruction-related feedback will be provided to CMD personnel and the CMD OMI Commandant.

    a. The CMD OMI Commandant shall be immediately made aware of any concerns or deficiencies regarding CMD Instructor performance via written communication. The CMD OMI Commandant will address all concerns or liabilities with the CMD Instructor and shall provide a written summary for directives for remediation of problems or deficiencies to the OMI Superintendent within 14 calendar days.
    b. If concerns persist, OMI will provide written notice detailing deficiencies and recommended corrective actions to the CMD OMI Commandant.
    c. The CMD OMI Commandant will meet with the CMD Instructor, OMI Superintendent or designee, and relevant OMI instructional staff to create Performance Improvement Plan or generate a Proposed Disciplinary Action in accordance with CMD policy and regulation.
    d. Any documentation at this level may be shared with the OMI Superintendent through a Memorandum for Record to ensure all areas identified by OMI were addressed.
    e. The CMD OMI Commandant may utilize this feedback on CMD personnel state active-duty evaluations.

10) The CMD OMI Commandant shall regularly evaluate Non-instructional CMD personnel.

a. OMI administrators and staff may provide feedback to the CMD OMI Commandant regarding Non-instructional CMD personnel performance.
b. All initial feedback concerns or deficiencies noted by OMI administrators and staff concerning CMD OMI staff will be communicated in either a verbal or written format to the CMD OMI Commandant.
c. If concerns or deficiencies noted by OMI administrators concerning CMD OMI non-instructional staff persist, OMI will provide a written notice detailing deficiencies and recommended corrective actions to the CMD OMI Commandant.
d. The CMD OMI Commandant will meet with the CMD member to create a Performance Improvement Plan or generate a Proposed Disciplinary Action in accordance with CMD policy and regulation. Any documentation at this level may be shared with the OMI Superintendent through a Memorandum for Record to ensure all areas identified by OMI were addressed.
e. The CMD OMI Commandant may choose to utilize OMI administrator or staff feedback on Non-instructional CMD personnel state active-duty evaluations.

11) OMI shall control physical access to the OMI campus. CMD personnel shall notify OMI office staff of their presence on campus in accordance with OMI access and accountability regulations.

a. OMI will provide written notification to the CMD OMI Commandant informing of any access revocation of CMD personnel to OMI campuses.

VIII. <u>GOVERNOR'S BUDGET AND ALLOWABLE EXPENDITURES:</u> A Not to Exceed (NTE) annual amount for allowable OMI operating expenses will be determined by the governor’s annual budget and available program funds as determined by CMD YCPTF on a yearly basis.

The state fiscal year runs from July 1st to June 30th. Funds allocated to OMI will not exceed the YCPTF allocated amounts per each state fiscal year for Category 3 operating expenses. YCPTF will authorize and provide an amount NTE for the current program year directly to OMI no later than August 1st for that current year.

OMI shall use all funds authorized in the Governor's annual budget and as determined by the CMD to support the role of CMD at OMI shall follow a "Spend Plan" that will include the following to be utilized for operating expenses as listed below in items 1 through 5:

1) Facilitate an "Entrance Camp" for new students applying for admittance to OMI.

2) Cost related to an "Advance Camp" for graduating eighth-grade cadets.

3) Base charges (transient costs) for outdoor education training such as R.O.P.E.S, orienteering and bivouacs, leadership school, team building; and

4) Cadet recruiting efforts and expenses.

5) Support cadet expenses related to cadet leadership, character,

athletic development, and sponsorships.

IX. LEGAL REQUIREMENTS: In accordance with the California Military and Veterans Code, CMD enters into this Cooperative Agreement knowing that OMI will operate as a Nonresidential Independent Public Charter School.

Both parties agree that OMI will operate as a Public Charter School, authorized and established in accordance with California law, and as a California Nonprofit Public Benefit Corporation established to perform the business and personnel services for the school consistent with its charter as granted by the Oakland Unified School District.

This Cooperative Agreement is valid and enforceable only if funds are allocated by the Budget Act for each Fiscal Year that this Cooperative Agreement is in effect. This Cooperative Agreement is subject to all restrictions, limitations, or conditions enacted by the Legislature and contained in the Budget Bills or any statute enacted by the Legislature which may affect the provisions, terms, or funding of this Cooperative Agreement.

X. FINANCIAL OVERSIGHT AND MONITORING: CMD reserves the right for the CMD Internal Review Office or any authorized representative to audit all financial and compliance records maintained by OMI in connection with CMD operations and services provided at OMI. CMD agrees that all audits will be at CMD's expense, and OMI agrees to provide CMD or its authorized representative with reasonable access to OMI records in case of an audit.

XI. AMENDMENTS: This agreement may be amended by mutual understanding in writing by all parties.

XII. INVOICING AND PAYMENT: OMI shall provide invoices and receipts to YCPTF's Resource Manager within the fiscal year every quarter for reimbursement payment. YCPTF Resource Manager will review documents and submit the invoice for payment to the CMD accounts payable department. SCO will mail reimbursement checks to OMI within 45 days of invoice receipt.

XIII. CONTRACT ADMINISTRATION:

1) The primary Cooperative Agreement Manager shall be as follows:

Agency:	Oakland Military Institute
Title:	Chairman of the Board
Name:	Honorable Edmund G. Brown
Phone:	510-289-0336
E-Mail:	jb@jerrybrown.org

2) The State Cooperative Agreement Administrator shall be as follows:

Agency:	California Military Department
Title:	CMD OMI Acting Commandant
Name:	CMSgt (CA) Thomas James
Phone:	510-775-5732

E-Mail: tjames@omiacademy.org

3) Should the contact information for either party change, the party will provide written notice with updated information no later than ten (10) business days after the change.

XIV. SEVERABILITY/TERMINATION: The parties shall have the right to terminate this Cooperative Agreement upon thirty (30) day written notice to the other parties.

XV. AMENDMENT: No amendment or variation of the terms of this Cooperative Agreement shall be valid unless made in writing, signed by the parties, and approved as required. No oral understanding or agreement not incorporated in the Cooperative Agreement is binding on any of the parties.

The parties hereto have executed this Cooperative Agreement.

SIGNATURES:

Digitally signed by Adam Rix
Date: 2026.07.23 13:10:15 -07'00'

7/23/2026

COL (CA) Adam L. Rix — **Date**

Signed, J8 Comptroller, California Military Department

Richard G. Vogt, COL, CA ANG
Digitally signed by Richard G. Vogt, COL, CA ANG
Date: 2026.09.10 16:00:52 -07'00'

Col. Richard Vogt — **Date**

Signed, Chief of Staff, Youth and Community Programs Task Force

Edmund G. Brown JR. — 9/14/2026

Printed Name — **Date**

Chairman of the Board, Oakland Military Institute

DocuSigned by:
Edmund G. Brown Jr.
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MEMORANDUM OF AGREEMENT

BETWEEN

THE UNITED STATES COAST GUARD

AND

THE OAKLAND MILITARY INSTITUTE

REGARDING USE OF FACILITIES TO PERFORM PHYSICAL FITNESS ACTIVITIES

1. **PARTIES.** The parties to this Agreement are the United States Coast Guard and the Oakland Military Institute, located in Oakland, California.

2. **AUTHORITY.** Coast Guard Civil Rights Manual, COMDTINST M5350.4E, Chapter 4 (Establishing policy for implementing the National Partnership in Education Program).

3. **PURPOSE.** The purpose of this Agreement is to set forth terms of mutual cooperation by which the *OAKLAND MILITARY INSTITUTE* will partner with the *UNITED STATES COAST GUARD* (herein referred to as *COAST GUARD*) to fulfill the educational and physical fitness needs of its student body while introducing the cadets to *COAST GUARD* missions, members and opportunities for military service.

4. **BACKGROUND.** The OAKLAND MILITARY INSTITUTE (OMI) is a public college preparatory academy founded in 2001 by then Oakland Mayor Jerry Brown and funded by the State of California. The Mission of *OMI* is to provide a structured and rigorous academic program where cadets develop as leaders, scholars, critical thinkers and citizens. Through a military framework, the school inspires honor and pride within its cadets, cultivating life-long respect, confidence, physical fitness, wellness and appreciation for others. Upon graduation, cadets will have completed the A-G requirements for admission to the Cal-State and University of California College school systems as well as top private and public universities nation-wide. One of the tenets of *OMI* is to help its cadets achieve a maximum level of personal fitness and wellness. Aquatics instruction is an integral part of second physical education courses. Unfortunately, *OMI* does not own a swimming pool at which to teach cadets to swim, nor does it have any sports or recreational facilities such as an indoor sports court to facilitate its interscholastic sporting competitions (e.g., volleyball, basketball). Another tenet of *OMI* is the development of leadership in its cadets. Formal classroom and field leadership training and exercises are part of the curriculum of the school. *OMI* desires to provide its cadets with opportunities to visit and conduct leadership training aboard military bases with the support of military personnel and base resources.

all of their employees, agents, contractors and members as additional insureds, and shall indemnify and hold harmless the United States, the United States Coast Guard, their employees, agents, contractors and members from all losses of whatever nature arising from the activities contemplated in this Agreement; and shall obtain and provide to the *COAST GUARD* written releases and liability waivers to the same effect from the parent or legal guardian of each *OMI* cadet before allowing that cadet to engage in the activities contemplated by this Agreement.

b. *COAST GUARD*:

1. Shall determine the times and dates available for *OAKLAND MILITARY INSTITUTE's* utilization of Base Alameda's facilities and provide details of such availability.
2. Shall designate a point of contact(s) for scheduling *OAKLAND MILITARY INSTITUTE's* base access and utilization of Base Alameda's facilities.
3. Shall designate a qualified Partnership In Education representative onboard Base Alameda to log and oversee activities conducted by the *Oakland Military Institute.*
4. Shall minimize the potential risks to human life and property by providing *COAST GUARD* representative to disseminate information regarding *COAST GUARD* emergency procedures (EMS, earthquake, other natural disasters).
5. Shall notify *OAKLAND MILITARY INSTITUTE's* designated point of contact of facility closures or periods of unavailability at the earliest time reasonably practicable.
6. Shall provide, at its sole discretion, volunteer Coast Guardsmen to serve as assistant instructors, chaperones, and additional safety observers when requested by *OAKLAND MILITARY INSTITUTE*, as available, and subject to Coast Guard mission commitments.
7. Shall put forth its best efforts to collaborate *with OAKLAND MILITARY INSTITUTE* to develop a productive Partnership in Education program that is beneficial to the student body, the *COAST GUARD* and the local community as a whole.

6. **POINTS OF CONTACT.**

a. *COAST GUARD*
CAPT William B. Winburn – Base Alameda Commanding Officer
Phone: (510) 437-3173
E-mail: William.B.Winburn@uscg.mil
CG Base Alameda, Bldg 21
Coast Guard Island Alameda, CA 94501

written Agreement of the Parties. Either Party upon thirty (30) days written notice may terminate this Agreement.

12. **APPROVED BY:**

UNITED STATES COAST GUARD	OAKLAND MILITARY INSTITUTE
Date:	Date:
WINBURN.WILLIAM.BRIAN.1133750122 Digitally signed by WINBURN.WILLIAM.BRIAN.1133750122 Date: 2025.08.07 09:26:34 -07'00'	
William B. Winburn, CAPT, USCG Commanding Officer Base Alameda	Mary Streshly, Dr Superintendent Oakland Military Institute

PROGRAM SERVICES AGREEMENT

This Program Services Agreement ("Agreement") is between SPECIAL EDUCATION LEADER FELLOWSHIP, INC. ("SELF") and OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY ("Partner"). Each may be called a "Party" and together, "Parties." The Parties enter into this Agreement for the purpose and on the terms provided herein and in the appendices.

1. **Purpose & Scope.**

   1.1. **Purpose.** This Agreement governs the relationship between SELF and the Partner for the delivery of professional development services as described in Appendix B: Scope of Work & Deliverables. The Partner agrees to cooperate in service delivery as outlined in this Agreement.

   1.2. **Scope of Services.** SELF will perform the duties and provide the deliverables included in Appendix B, which is incorporated by reference (the "Services"). Any timeline or milestone in Appendix B is binding.

   1.3. **Changes to Scope.** Any material change in deliverables, schedule, cost, or scope provided in Appendix B must be captured in a written change order or amended Scope of Work that is signed by both Parties. Verbal requests are not binding. If SELF agrees to a change in scope, the additional Service Fee must be paid before SELF initiates the additional Services.

2. **Partner Obligations.**

   2.1. **Partner Obligations.** The Partner agrees to (i) provide necessary access to facilities, technology, and personnel; (ii) ensure staff participation as outlined in Appendix B; (iii) designate a Program Point-of-Contact with authority to make day-to-day decisions; (iv) designate a Billing Point-of-Contact to support invoicing and payment; (v) provide required data and documentation in agreed formats and timelines; (vi) maintain appropriate insurance coverage; (vii) comply with all applicable laws and regulations; and (viii) give SELF reasonable notice of any changes affecting service delivery.

   2.2. **Cooperation Requirement.** Effective service delivery requires the Partner's active cooperation. SELF's obligations are contingent on the Partner fulfilling the commitments herein.

3. **Relationship of the Parties.**

   3.1. **Relationship Overview.** The Parties are separate and independent organizations. This Agreement does not create a partnership, employment relationship, or joint venture, and is not intended to transfer or exchange any asset. The Parties understand and expressly agree that each Party remains responsible for its own employees, taxes, and benefits. Neither Party nor any of its employees are entitled to any benefit which may be afforded to employees of the other Party, including workers' compensation and unemployment.

4. **Term and Renewal.**

   4.1. **Term and Renewal Overview.** The term of this Agreement is as listed in Appendix D: Billing, Payment & Authorization Information. This Agreement will not automatically renew. Any renewal must be confirmed in writing, signed by authorized representatives of both Parties, and executed prior to the expiration of the current term. If either Party determines that an extension is necessary, SELF will prepare an amendment, which the Partner must execute at least 15 days before the original termination date.

5. **Payment of Service Fee.**

   5.1. **Payment Terms.** The Partner agrees to pay SELF the Service Fee as listed in Appendix D and in Appendix B for the Services described herein.

5.1.1. **Time for Payment.** Upon full execution of this Agreement, SELF will issue an invoice to the Partner for the Service Fee. Payment of the Service Fee is due within thirty (30) days of the invoice date. SELF reserves the right to suspend, delay, or withhold the initiation or continuation of the Services if payment is not received by the due date. Any such suspension, delay, or withholding will not waive SELF's right to receive the full Service Fee or any other rights under this Agreement or applicable law.

5.1.2. **Obligation to Pay Fee.** The Partner's obligation to pay the full Service Fee is unconditional. The Partner remains obligated to pay the Service Fee even if the Services cannot be completed because of (a) the Partner's actions or inaction (for example, cancellations or failure to provide access, data, or approvals), or (b) events outside of SELF's reasonable control.

5.2. **No Refunds.** All fees and amounts paid to SELF are nonrefundable. Payments received will be applied to amounts due and retained if Services are cancelled or terminated for any reason.

6. Intellectual Property.

6.1. **SELF Retained Intellectual Property.** SELF retains the ownership of (i) all pre-existing methodologies, curricula, training materials, and other deliverables; and (ii) general knowledge and expertise gained through service delivery.

6.2. **Partner Intellectual Property.** The Partner owns the materials that it provides to SELF to perform the Services.

6.3. **License.** SELF assigns to the Partner a non-exclusive, royalty-free, perpetual license to use custom reports, assessments, materials, or other deliverables created specifically for the Partner by SELF in the performance of the Services.

6.4. **Name & Logos.** SELF and the Partner may use the other's name and logo in published materials (e.g., website and catalog) to reference the work done under this Agreement. The content and text of all promotional information must be approved by both Parties prior to release.

6.5. **Publicity & Use of Results.** SELF may (i) list the Partner's name and logo, as well as brief, factual descriptions of the Services that SELF provided, on its website, social media platforms, slide decks, and other marketing materials; and (ii) publish aggregate, de-identified outcome data and photographs from sessions, provided the Partner (and, where applicable, parents) give written consent for any identifiable images.

7. Termination.

7.1. **Termination without Cause.** Either Party may terminate this Agreement at any time by giving 30 days' written notice. When the Partner has paid the Service Fee directly, SELF will refund or credit the unused portion of those fees prorated to the Services already delivered.

7.2. **Termination for Cause.** A Party may also terminate the Agreement if the other Party commits a material breach of this Agreement, including non-payment or a failure to cooperate, and does not make a good-faith attempt to cure that breach within 15 days after written notice specifying the breach. In such instance, the Agreement will terminate as of the date of the notice specifying the breach.

8. Compliance Warranties.

8.1. **Partner's Warranties.** The Partner warrants that its Program Point-of-Contact identified above has reviewed this Agreement and certifies that expenditure for the Services complies with all applicable federal and state laws and regulations and the policies of the State Board of Elementary and Secondary Education ("SBESE"). The Partner warrants that the Partner's Program Point-of-Contact understands that he/she is subject to disciplinary or appropriate legal action if his/her assurance is knowingly in violation of public laws or the SBESE's policies.

8.2. **SELF's Warranties.** SELF warrants that it has conducted, with due diligence, an examination of its business relationships and affairs, and to the best of its knowledge, information, and belief, that SELF is not prohibited from entering this Agreement by La. R.S. § 42:1113. If, for whatever reason, SELF becomes unable to perform the Services under this Agreement due to La. R.S. § 42:1113, the Parties may terminate this Agreement without cause.

9. **Confidentiality and Student Privacy.**

9.1. Student Privacy. The Parties enter into this Agreement in accordance with the provisions of La. R.S. § 17:3914, the Family Educational Rights and Privacy Act, 20 U.S.C. § 1231(g), *et seq.* ("FERPA"), the Individuals with Disabilities Education Act, 20 U.S.C. § 1400, *et seq.*, ("IDEA"), and Protection of Pupil Rights Amendment, 20 U.S.C. § 1232h ("PPRA"). Details required under these laws appear in Appendix A: Confidentiality & Student Data, which is incorporated here. When SELF receives personally identifiable student data ("Student Data") from the Partner, SELF will (i) use Student Data solely to fulfill the legitimate educational interest of delivering the Services; (ii) when possible, collect only de-identified and anonymous Student Data; (iii) store and process Student Data using administrative, physical, and technical safeguards to secure the Student Data from unauthorized access, disclosure, and use; (iv) ensure that SELF's employees, partners, and contractors are aware of and adhere to these obligations; (v) promptly notify the Partner of any confirmed security breach involving Student Data and cooperate with the Partner on remediation; and (vi) retain Student Data only for as long as is necessary to deliver the Services, and thereafter will securely delete or destroy it.

9.2. Mutual Confidentiality. Each Party acknowledges that it may receive confidential information from the other Party during the performance of this Agreement. "Confidential Information" includes:

9.2.1. SELF Confidential Information. Proprietary methodologies, training materials, curricula, assessment tools, business strategies, financial information, client lists, and other non-public business information.

9.2.2. Partner Confidential Information. Student data, personnel information, internal policies and procedures, financial information, strategic plans, and other non-public institutional information.

9.3. Confidentiality Obligations. Each Party agrees to (i) maintain the confidentiality of the other Party's Confidential Information; (ii) use Confidential Information solely for purposes of performing under this Agreement; (iii) not disclose Confidential Information to third parties without prior written consent; (iv) take reasonable security measures to protect Confidential Information; (v) follow the Security Breach Response protocol outlined in Appendix A, Section 5 in the event of any confirmed or suspected breach; (vi) limit access to Confidential Information to employees or agents with a legitimate need to know; and (vii) return or destroy Confidential Information upon termination of this Agreement, except where retention is required by applicable law or regulation, in which case such information will be retained securely and in accordance with the confidentiality obligations herein for the duration of any legally mandated retention period.

9.4. Exceptions. Confidentiality obligations do not apply to information that (i) is publicly available through no breach of this Agreement, (ii) was known to the receiving Party prior to disclosure, (iii) is independently developed without the use of Confidential Information, and (iv) is required to be disclosed by law or court order (with advance notice to the disclosing Party when legally permissible).

9.5. Survival. Confidentiality obligations survive termination of this Agreement.

9.6. Remedies. Each Party acknowledges that breach of confidentiality could cause irreparable harm for which monetary damages would be inadequate. Therefore, the non-breaching Party may seek injunctive relief in addition to other available remedies.

9.7. Additional Exceptions. Confidentiality obligations shall not apply to any disclosure that is required under Louisiana public records laws (R.S. 44:1 et seq), the Louisiana posting of public school governing authority fiscal information law (R.S. 17:88.1), or other similar laws impacting public charter schools in Louisiana.

10. **Force Majeure.**

10.1. Force Majeure Overview. Neither Party will be liable for a delay or failure to perform its obligations under this Agreement when the delay or failure result from circumstances beyond that Party's reasonable control ("Force Majeure Events"). This provision does not excuse the Partner's payment obligation, and fees already paid are non-refundable.

10.2. Force Majeure Events. Force Majeure Events include (i) natural disasters (earthquakes, fires, floods, severe weather); (ii) public health emergencies (epidemics, pandemics, quarantine orders); (iii) government actions (shutdowns, emergency orders, regulatory changes); (iv) infrastructure failures (power outages, internet/communication disruptions, transportation breakdowns); (v) labor disruptions (strikes, work stoppages); (vi) acts of war, terrorism, or civil unrest; and (vii) other unforeseeable events that prevent performance despite reasonable efforts.

10.3. **Mitigation Efforts.** When a Force Majeure Event occurs, the affected Party must (i) promptly notify the other Party in writing, (ii) make good-faith efforts to minimize delays and resume performance, and (iii) provide regular updates on the situation and expected resolution. SELF may modify timing, format, or location (including remote/virtual delivery or adjusted schedules) to continue the Services. The Partner will cooperate with reasonable alternate delivery of the Services.

10.4. **Extended Force Majeure.** If a Force Majeure Event continues for more than 60 days, either Party may terminate this Agreement upon written notice in accordance with Section 7. Termination under this Section does not entitle the Partner to any refund. The Partner remains responsible for (i) amounts already paid (non-refundable), (ii) fees for the Services performed through the effective termination date, and (iii) SELF's non-cancelable, committed costs incurred to deliver the Services.

11. **Limitation of Liability & Disclaimers.**

11.1. **Liability Cap.** Each party's total liability will not exceed the total fees paid under this Agreement. Neither Party is liable for consequential, punitive, or incidental damages.

11.2. **Professional Services Disclaimer.** SELF provides professional development services based on current best practices. SELF makes no warranties regarding specific student outcomes, test score improvements, or compliance results.

11.3. **Third-Party Actions.** Neither party is liable for actions or omissions of the other party's employees, agents, or students.

12. **Warranties & Indemnification.**

12.1. **Mutual Warranties.** Each Party warrants that it has the authority to enter into this Agreement, and any amendments to the Scope of Work, and will perform their obligations in a professional manner.

12.2. **Partner Indemnification.** The Partner expressly agrees to indemnify, defend, and hold harmless SELF and its officers, directors, employees, and agents from any and all third-party claims, losses, demands, suits, causes of action, damages, liability, and judgments of sums of money (including reasonable attorney's fees, costs, and expenses) resulting from, or by reason of any act or omission committed by the Partner related to the Services.

12.3. **SELF Indemnification.** SELF expressly agrees to indemnify, defend, and hold harmless the Partner and its officers, directors, employees, and agents from any and all third-party claims, losses, demands, suits, causes of action, damages, liability, and judgments of sums of money (including reasonable attorney's fees, costs, and expenses) resulting from, or by reason of any act or omission committed by SELF related to the Services.

13. **Insurance.**

13.1. **Insurance Overview.** Each Party agrees to maintain appropriate insurance coverage, including general liability and, if applicable, professional liability coverage, for the duration of this Agreement. Either Party may request current certificates of insurance at any time.

14. **Non-Discrimination.**

14.1. **Non-Discrimination Overview.** SELF complies with all applicable federal non-discrimination laws and will not discriminate in hiring or in performing the Services on the basis of race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, or political affiliation.

15. **Miscellaneous.**

15.1. **Entire Agreement.** This Agreement, with the Appendices, contains the entire agreement between the Parties with respect to the matters covered herein and supersedes all prior and contemporaneous discussions, agreements, and understandings, whether written or oral.

15.2. **Binding Effect.** This Agreement will inure to the benefit of the Parties hereto and will be binding upon each of them, and their heirs, estates, assigns, representatives, predecessors, and successors.

15.3. **Severability.** This Agreement will be interpreted in such a manner as to be valid and enforceable, but if any provision will be held to be invalid, such provision will be ineffective only to the extent of such invalidity, without rendering

unenforceable the remainder of such provision or the remaining provisions of this Agreement.

15.4. Modification, Termination, or Waiver. No modification, termination, or waiver of this Agreement will be valid and enforceable unless in writing and signed by the Parties, or in the case of a waiver of this Agreement signed by the Party against whom the waiver is sought to be enforced.

15.5. Assignment. Neither Party may assign or transfer any right or obligation under this Agreement without the other Party's prior written consent, except that SELF may assign the right to receive payment to a bank or other financial institution as collateral. SELF will give the Partner prompt notice of any such permitted assignment.

15.6. Survival. The following Sections of this Agreement, as each may be amended, will survive termination for any reason: 6 (Intellectual Property), 9 (Confidentiality & Student Privacy), 11 (Limitation of Liability & Disclaimers), and 12 (Warranties & Indemnification).

15.7. No Construction Against Drafter. No provision of this Agreement will be construed more strictly against any Party because the Party or its agents drafted it.

15.8. Governing Law & Jurisdiction. This Agreement will be interpreted, enforced, and governed by and under the laws of the State of Louisiana, without regard to any conflicts of laws principles that would require the application of any other laws. Each Party executing this Agreement or any counterpart thereof agrees to the fullest extent permitted by law to consent to the jurisdiction of any court of the State of Louisiana, or United States Court located in the State of Louisiana, in connection with any dispute or controversy arising out of or related to this Agreement. The Parties agree that any litigation, proceeding, or other court action, will be exclusively commenced and maintained in the State of Louisiana. Louisiana will be the exclusive venue in any dispute between the Parties related to this Agreement.

15.9. Warranties. By signing this Agreement, the Parties each warrant that they have the capacity and authority to enter this Agreement and that they have done so knowingly and voluntarily, without duress, after having consulted with their respective legal counsel.

15.10. Counterparts; Execution of Agreement. The Parties are permitted to execute this Agreement in one or more counterparts, each of such counterparts is to be deemed to be an original copy of this Agreement, and all of which, when taken together, are to be deemed to constitute one and the same instrument. The exchange of copies of this Agreement and of signature pages by facsimile, electronic mail, or other electronic transmission constitutes effective execution and delivery of this Agreement as to the Parties.

15.11. Electronic Copy Sufficient. The Parties agree that this Agreement may be executed and delivered through an electronic contract platform, and that the executed electronic document, including any version downloaded in Portable Document Format ("PDF") or other digital format, is sufficient to establish and prove the terms of this Agreement. No original hard-copy document or wet-ink signature is required.

15.12. Electronic Signatures. The Parties agree that electronic signatures, including facsimile or digitally signed copies in Portable Document Format or other widely accepted electronic formats, will have the same legal effect as the original signatures and will be deemed valid and binding on the Parties for all purposes under this Agreement.

15.13. Notices. Notices and other communications related to the Services or this Agreement must be in writing and will be sent by electronic mail, or, if mailed, by first class mail, postage prepaid, certified, or registered mail, return receipt requested. Notice is effective upon confirmed delivery. Notice will be sent to the Parties' respective addresses and to the attention of the person set forth above.

The Parties execute this Agreement as follows:

SIGNED AND AGREED:

Special Education Leader Fellowship, Inc.

DATE: 2026-09-09

SIGNATURE: Shauuon M. Garfield

NAME: Shannon M Garfield

CEO

For SELF

SIGNED AND AGREED:

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY

DATE: 2026-09-09

SIGNATURE: Mary Streshly

NAME: Mary Streshly

SUPERINTENDENT

For OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY

APPENDIX A: CONFIDENTIALITY & STUDENT DATA

By executing the Program Services Agreement, the Partner expressly acknowledges and agrees to all provisions in this Appendix. All provisions of the Agreement govern this Appendix.

1. **Background.** The Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g ("FERPA"), and its implementing regulations codified at 34 C.F.R 99.1 *et seq.*, make personally identifiable student information in education records confidential and generally prohibit disclosure to third parties without parental consent. FERPA allows educational agencies to share student data with contractors performing work on their behalf under appropriate safeguards. "Personally Identifiable Information" is information that identifies or may be used to identify an individual. PII includes direct identifiers (e.g., name, social security number, or student ID); indirect identifiers, which is information that can be combined with other information to identify specific individuals (e.g., a combination of gender, birth date, geographic indicator, and other descriptions); and might also include race, religion, or education information if that information can be linked together to ascertain the identity of a person. "Student Data" means Personally Identifiable Information of students that is collected or used by SELF for the purpose of providing its Services.

2. **Privacy Compliance.** This Appendix governs the handling of Student Data under FERPA and La. R.S. § 17:3914. Both Parties acknowledge that all documents containing Student Data are confidential and will not be disclosed to third parties without proper authorization.

3. **Data Security Requirements.** Both Parties must (i) store Student Data (physical and electronic) in secure, limited-access areas; (ii) permit access to Student Data only to authorized personnel; (iii) maintain Student Data on computer systems or databases with password controls; (iv) prevent unauthorized extraction or removal of Student Data from databases; (v) keep physical materials in locked storage when not in use; and (vi) prohibit removal of data from secure areas.

4. **Audit Rights.** The Partner may conduct security audits of SELF's Student Data practices at any reasonable time. SELF will cooperate with the Partner, including by providing access to relevant personnel, records, and systems during business hours; documentation necessary for security reviews; and copies of requested materials (at the Partner's expense).

5. **Security Breach Response.**

    5.1. **Security Breach.** "Security Breach" means any compromise of Student Data security, confidentiality, or integrity, or any verified privacy complaint.

    5.2. **Prevention.** Both Parties will take reasonable steps and best efforts, using industry standards and applicable laws, to prevent a Security Breach.

    5.3. **Response Protocol.** The Parties will take reasonable steps to promptly remedy any Security Breach and to prevent any further Security Breach, each at its own expense. The Parties will adhere to the following protocol: (i) upon signing of the Program Services Agreement, the Partner provides SELF with primary and backup security contacts; (ii) either Party will immediately notify the other in the event of a Security Breach; (iii) the Parties will coordinate investigation of the Security Breach and their respective response efforts; (iv) both Parties will assist with investigations, facility access, interviews, relevant records, and required notifications; and (v) the Parties will ensure that breach procedures comply with applicable laws.

6. **Data Return and Destruction.** Upon termination of the Agreement, SELF will (i) return all Student Data to the Partner in usable electronic format, (ii) destroy any remaining Student Data using methods that prevent reconstruction, and (iii) certify completion in writing within 30 days.

APPENDIX B: SCOPE OF WORK & DELIVERABLES

The detailed Scope of Work and Deliverables for this Agreement will appear on the following page.

Oakland Collaborative

This scope of work outlines a yearlong learning sequence designed to strengthen special education leadership across participating CMOs. Each CMO will receive a two-day kickoff, a full day of learning and collaboration in both the fall and spring, and opportunities to visit strong school sites and see effective practices in action.

The CMO investment is $2,500 for the lead special education leader and $1,500 for each additional special education leader, with the total investment capped at $5,000 per CMO.

Fall Intensive Arc

REFLECT → IDENTIFY → ANALYZE → CREATE → SYNTHESIZE → BUILD → CONNECT → APPLY

The Fall Intensive sets the foundation for leaders to think beyond what is working today and toward what they want to make possible for students in the years ahead. It creates space to lead with greater intention, build systems that can grow and sustain over time, and tap into the expertise that already exists across Oakland. This foundation will carry into a year of leaders building, learning, and growing together toward a shared commitment to better outcomes for students with disabilities.

Day	Session	Outcomes
Day 1 Morning	**Leading with Intention: Building Inclusive Systems**	• Evaluate how leaders' own practices and presence shape educator, student, and system-level outcomes in inclusive environments. • Design a high-leverage growth focus for the year, grounded in the intentional practices and conditions that drive strong inclusive systems.
Day 1 Afternoon	**Seeing the System, Shaping the Future**	• Critique current special education programming, distinguishing strengths from systemic gaps through the lenses of student experience and intentional leadership. • Construct a shared vision for special education programming in which inclusive practice is both felt and seen across the school.
Day 2 Morning	**Planning with Purpose**	• Analyze current special education programming to identify strengths, systemic gaps, and opportunities for growth through the lenses of student experience and intentional

		leadership. • Design a strategic plan that centers intentional leadership, sustainable systems, and cross-school learning to drive lasting impact for students and educators.
Day 2 Afternoon	**Building Together**	• Establish intentional partnerships with Oakland schools whose strengths align to identified growth areas, setting up winter site visits and continued learning. • Translate strategic plans into action, using dedicated work time, collaboration, and individualized support to begin implementation.

Winter Collaborative Arc

LEAD → DEEPEN → REFLECT → REFINE → COLLABORATE → BUILD

The Winter Collaborative gives leaders space to deepen how they lead the work they began in Fall and learn from what has unfolded since. On Day 1, leaders will build shared leadership skills, choose a targeted area of learning most relevant to their growth and strategic work, and use that learning to reflect on and refine their strategic plans alongside peers. On Day 2, leaders have the option to extend this learning through site visits to Oakland schools whose strengths align to their areas of growth, observing practices in action and gathering insight that will also help identify the needs of new teachers to inform the Oakland-specific new teacher training scope and sequence.

Day	Session	Outcomes
Day 1 Morning	**Leading Change, Deepening Practice**	• Evaluate how strategic priorities can move beyond one leader by building buy-in, navigating influence, and creating shared ownership across teams. • Strengthen a targeted area of practice, coaching or data leadership, chosen based on relevance to individual growth and strategic work.
Day 1	**Reflect, Refine, Build**	• Synthesize learning from implementation and the morning sessions to revisit and refine

Afternoon		strategic plans. • Collaborate across schools through problem-solving, resource sharing, peer feedback, and individualized support to turn reflection into action.
Day 2	**Observe and Reflect**	• Observe practices in Oakland schools whose strengths align to identified growth areas, gathering ideas and perspectives adaptable to their own school context. • Identify patterns and needs surfaced through observation to inform the Oakland-specific new teacher training scope and sequence.

Spring Collaborative Arc

REFLECT → ENVISION → DEEPEN → INTEGRATE → DESIGN → PREPARE

The Spring Collaborative gives leaders space to step into next-year planning with the perspective and learning they have built throughout the year. Leaders will begin by considering how to intentionally lead the transition from this year's work into what comes next, choosing a targeted area of learning connected to timely needs within their schools. The afternoon brings the year together, using strategic plans, site visits, and shared learning across Oakland to shape what leaders will carry forward within their own schools and what this collective has learned about supporting educators across the city.

Day	Session	Outcomes
Day 1 Morning	**Leading Into What's Next**	• Reflect on learning about themselves, their schools, and their students this year to intentionally lead the transition into next year, determining what should be sustained, evolved, or redesigned. • Strengthen a targeted area of practice, designing professional learning that changes educator practice or coaching for planning, prioritization, and follow-through, chosen based on a timely need within their school.
		• Integrate leadership growth, strategic plans,

Day 1 Afternoon	**Reflect, Integrate & Design What's Next**	implementation, and site visit learning to identify what to sustain, strengthen, or design differently for the year ahead, including implications for educator development. • Identify patterns, needs, and opportunities emerging across Oakland to inform what future teacher development and collaborative support should prioritize.
Day 2	**Observe and Reflect**	• Observe practices relevant to where their school is headed, connecting with peers across Oakland and sharing their own areas of expertise. • Reflect on insights from the visit to inform Spring planning and determine what to carry forward into the year ahead. • Identify patterns and needs surfaced through observation to inform the Oakland-specific new teacher training scope and sequence.

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APPENDIX C: SELF W-9

SELF's most recent W-9 will appear on the following page.

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See ***Specific Instructions*** on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

Special Education Leader Fellowship, Inc.

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☑ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . ☐

5 Address (number, street, and apt. or suite no.). See instructions.

4035 Washington Ave

6 City, state, and ZIP code

New Orleans, LA 70125

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–		–				

or

Employer identification number

8	3	–	2	0	8	3	1	9	6

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person** Shannon M. Garfield **Date** 2024-09-30

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);

2. Certify that you are not subject to backup withholding; or

3. Claim exemption from backup withholding if you are a U.S. exempt payee; and

4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and

5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.

2. The treaty article addressing the income.

3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.

4. The type and amount of income that qualifies for the exemption from tax.

5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;

2. You do not certify your TIN when required (see the instructions for Part II for details);

3. The IRS tells the requester that you furnished an incorrect TIN;

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or

5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "*By signing the filled-out form*" above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of $50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a $500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or "doing business as" (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner's name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

• Generally, individuals (including sole proprietors) are not exempt from backup withholding.

• Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.

• Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.

• Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

2—The United States or any of its agencies or instrumentalities.

3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.

5—A corporation.

6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.

7—A futures commission merchant registered with the Commodity Futures Trading Commission.

8—A real estate investment trust.

9—An entity registered at all times during the tax year under the Investment Company Act of 1940.

10—A common trust fund operated by a bank under section 584(a).

11—A financial institution as defined under section 581.

12—A middleman known in the investment community as a nominee or custodian.

13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over $600 required to be reported and direct sales over $5,000[1]	Generally, exempt payees 1 through 5.[2]
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

[1] See Form 1099-MISC, Miscellaneous Information, and its instructions.

[2] However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at *www.SSA.gov*. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at *www.irs.gov/EIN*. Go to *www.irs.gov/Forms* to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to *www.irs.gov/OrderForms* to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account[1]
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor[2]
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee[1]
b. So-called trust account that is not a legal or valid trust under state law	The actual owner[1]
6. Sole proprietorship or disregarded entity owned by an individual	The owner[3]
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity[4]
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

[1] List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

[2] Circle the minor's name and furnish the minor's SSN.

[3] You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

[4] List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to *phishing@irs.gov*. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at *spam@uce.gov* or report them at *www.ftc.gov/complaint*. You can contact the FTC at *www.ftc.gov/idtheft* or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see *www.IdentityTheft.gov* and Pub. 5027.

Go to *www.irs.gov/IdentityTheft* to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

Signature Certificate

Reference number: NSLIA-23KND-XUUFH-GERH2

Signer	Timestamp	Signature
Shannon Garfield Email: sgarfield@selfnola.org		
Sent:	19 Sep 2024 16:38:22 UTC	
Viewed:	30 Sep 2024 12:44:54 UTC	
Signed:	30 Sep 2024 12:45:30 UTC	
Recipient Verification:		IP address: 64.224.255.87
✔Email verified	30 Sep 2024 12:44:54 UTC	Location: New Haven, United States

Document completed by all parties on:
30 Sep 2024 12:45:30 UTC

Page 1 of 1

Signed with PandaDoc

PandaDoc is a document workflow and certified eSignature solution trusted by 50,000+ companies worldwide.

APPENDIX D: BILLING, PAYMENT & AUTHORIZATION INFORMATION

Partner	
Partner Name	OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
Partner Address	3877 Lusk Street, Oakland, CA 94608
Designated Authorized Signatory	Mary Streshly SUPERINTENDENT Partner Authorized Signatory Email Address: mstreshly@omiacademy.org
Partner Billing Contact	Partner Billing Contact Name: carlos Rodriguez Title: Business Manager Partner Billing Email Address: crodriguez@omiacademy.org
Partner Program Point-of-Contact	Partner-Program Point of Contact Name: Zandra Texeira Title: Chief Academic Officer Partner Program Point of Contact Email Address: ztexeira@omiacademy.org
Service Amount	**$2500.00**
Service Fee	$2500.00 payable by the Partner per Section 5
Preferred Method of Payment*	ACH Transfer (SELF Preferred)
SELF	
SELF Address	4035 Washington Ave, Suite 206, New Orleans, LA, 70125
SELF Contract & Billing Contact	Shannon Garfield, CEO billing@selfnola.org
Program Offering	OAKLAND COLLABORATIVE (NSTF)
Scope of Work	See Appendix B
Term of Service	September 9, 2026 to June 30, 2027

***Billing Authorization Details**
SELF manages invoicing, payables, and receivables through BILL, its financial operations platform. Upon full execution of this Agreement, SELF will issue an invoice through BILL reflecting the Partner's selected payment method. Please reference the instructions below based on the selection above.

ACH Transfer or Credit Card (via BILL). SELF will issue an invoice through BILL to the Partner's designated Billing Point-of-Contact. The Partner may complete payment via ACH bank transfer, credit card, or other available options directly through the invoice. Where the Partner's financial policies do not allow payment via BILL, please forward the Partner's ACH authorization form to billing@selfnola.org for completion and secure processing.

Check. Please remit payment to:
Special Education Leader Fellowship
4035 Washington Avenue, Suite 206
New Orleans, LA 70125

Other. If the Partner requires a payment method not listed above, Partner should contact billing@selfnola.org prior to full execution of this Agreement so SELF can confirm compatibility and provide any necessary documentation or account information to support the Partner's process.

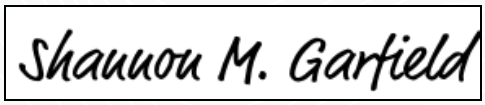
Please Note: To avoid delays in launching or continuing the Services, SELF prefers electronic payments including ACH, bank transfers, and other online payment options available through its invoices. SELF is fully responsive to the Partner's internal processes and requirements; this preference is simply intended to help avoid mail delays or lost checks.

For any support transitioning to electronic payment, the Partner may contact SELF directly at billing@selfnola.org.

CERTIFICATE *of* SIGNATURE

REF. NUMBER
P8NWM-AUEXS-9HWUU-N6GZG

DOCUMENT COMPLETED BY ALL PARTIES ON
09 SEP 2026 21:45:35 UTC

SIGNER	TIMESTAMP	SIGNATURE
MARY STRESHLY EMAIL MSTRESHLY@OMIACADEMY.ORG	SENT 09 SEP 2026 16:33:48 VIEWED 09 SEP 2026 21:32:48 SIGNED 09 SEP 2026 21:35:38	 IP ADDRESS 50.200.218.254 LOCATION EUGENE, UNITED STATES
RECIPIENT VERIFICATION	EMAIL VERIFIED 09 SEP 2026 21:32:48	
SHANNON GARFIELD EMAIL SGARFIELD@SELFNOLA.ORG	SENT 09 SEP 2026 16:33:48 VIEWED 09 SEP 2026 21:44:50 SIGNED 09 SEP 2026 21:45:35	 IP ADDRESS 32.216.29.124 LOCATION NEW HAVEN, UNITED STATES
RECIPIENT VERIFICATION	EMAIL VERIFIED 09 SEP 2026 21:44:50	

Coversheet

Approve First Interim Budget Report (Financial Update)

Section: IV. Items
Item: A. Approve First Interim Budget Report (Financial Update)
Purpose: Vote
Submitted by: Jessika Welcome
Related Material: OMI-Nov FY27 BOD Meeting Financial Packet-JW-20261113.pdf

BACKGROUND:

Charter schools are required to approve two annual Interim Budget Reports that demonstrate the school's ability to meet its financial obligations for the remainder of the current fiscal year and two subsequent fiscal years.

Interim reports are based on criteria and standards adopted by the State Board of Education (SBE). Because the budget is a "living document" that changes as new information becomes available, it is expected that variances will occur between the First Interim Budget and Second Interim Budget.

Budget revisions are brought to the Board of Directors in order to keep operations moving and the budget current. The First Interim Budget Report for the Oakland Military Institute (OMI) 2026-2027 reflects the school's financial condition as of October 31, 2026, and demonstrates that OMI will be able to meet its financial obligations for the current and subsequent two fiscal years.

A copy of this report will be sent to the Oakland Unified School District and the Alameda County Office of Education.

RECOMMENDATION:

The superintendent and staff recommends that the Board approve the 2026- 2027 First Interim Budget Report.

vertex EDUCATION

Oakland Military Institute Financial Update

Jessika Welcome

November 19, 2026

Contents

- 2026-27
  - Key Performance Indicators
  - Enrollment & Attendance
  - Forecast Update
  - 1st Interim MYP
- Exhibits
  - October Financials
  - October Cash Flows
  - October Balance Sheet
  - MYP

vertex
EDUCATION

2026-27

Key Performance Indicators

Board Budget vs. YTD Actuals

	Budget	YTD Actuals	Rec'd/ Spent
Revenue	12,575,624	1,928,261	15.3%
Expenses	11,965,664	3,908,207	32.7%
Net Income	609,960	(1,979,946)	

Current Year-End Forecast vs. Previous Forecast

	Jul 2027	Oct 2027	Change from last month
Revenue	12,827,220	13,111,026	283,806
Expenses	12,127,728	12,264,996	(137,269)
Net Income	699,492	846,030	146,538



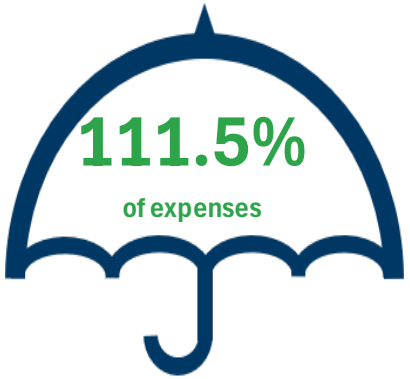
cash on hand (as of last month)

- less than 15 days
- between 15 days and 60 days
- more than 60 days



current ratio (as of last month)

- less than 0.9
- between 0.9 and 1.0
- more than 1.0



End-of-FY27 fund balance (forecast)

- less than 15.0%
- between 15.0% and 25.0%
- more than 25.0%

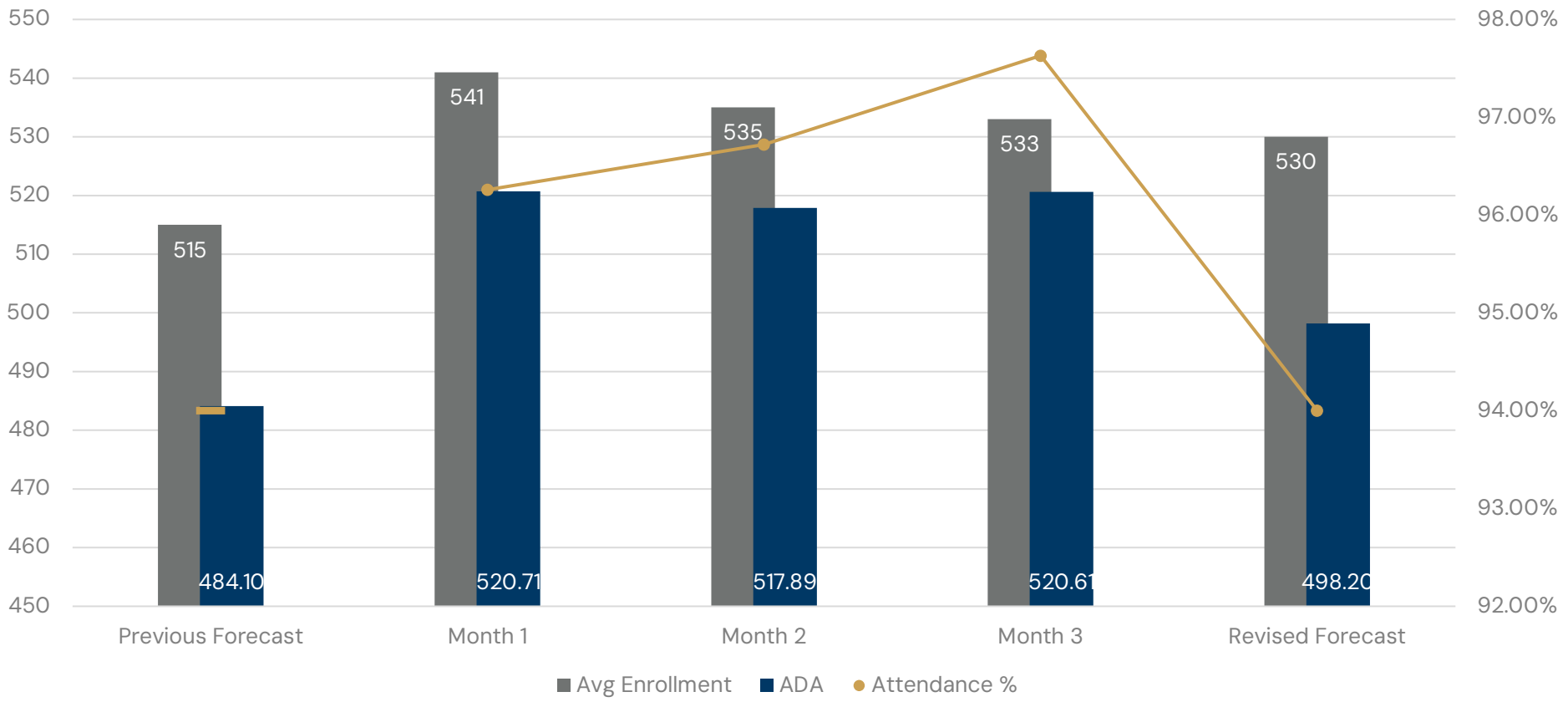


End-of-FY27 debt-to-asset ratio (forecast)

- more than 100%
- between 90% and 100%
- less than 90%

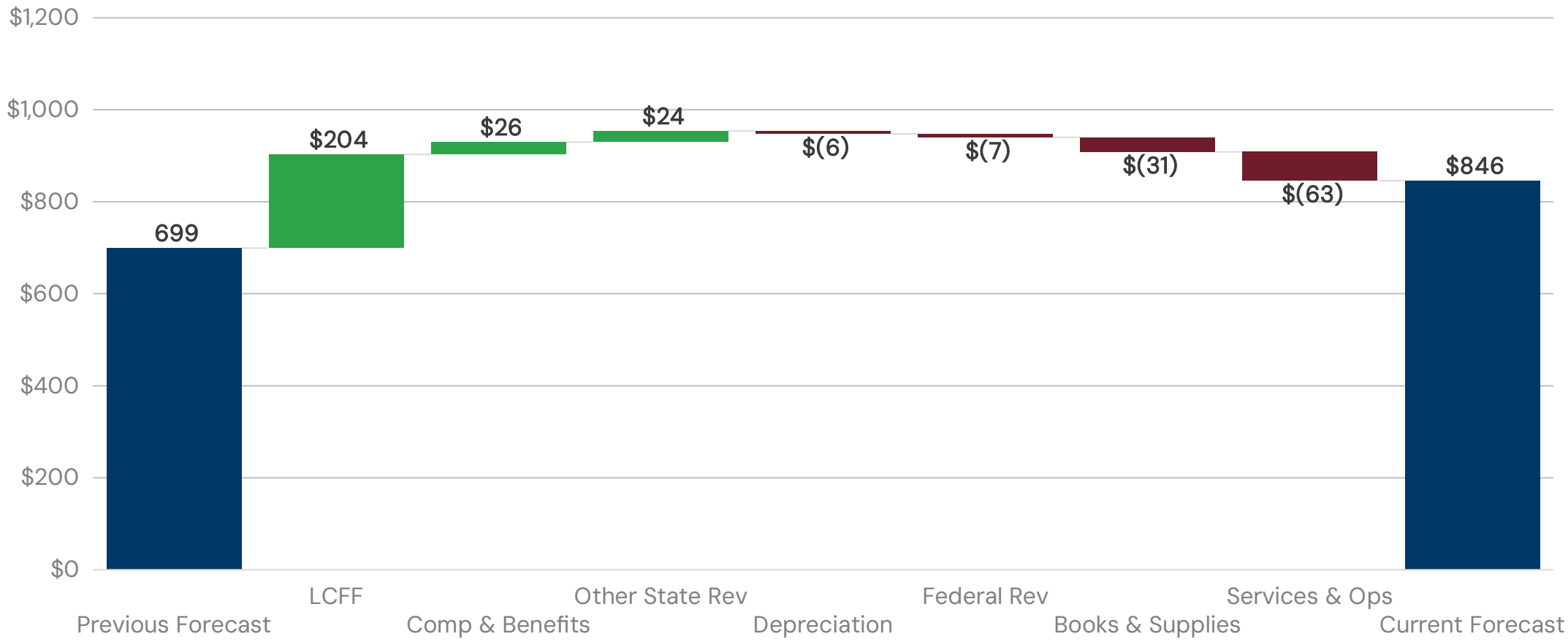
Enrollment & Attendance

Strong enrollment and high attendance prompt forecast revision; ADA target increases



Forecast Update

Forecast improves by $147K, largely due to increased ADA projection



1st Interim MYP

		2026-27	2027-28	2028-29
		Current Forecast	Projected Budget	Projected Budget
Revenue	LCFF Entitlement	8,356,104	8,567,888	9,284,957
	Federal Revenue	676,487	690,892	700,674
	Other State Revenues	2,764,673	2,254,900	2,094,322
	Local Revenues	291,500	291,500	291,500
	Fundraising and Grants	1,022,262	156,986	156,986
	Total Revenue	**13,111,026**	**11,962,166**	**12,528,439**
Expenses	Comp and Benefits	8,187,683	7,616,184	8,098,587
	Books and Supplies	864,399	864,581	900,518
	Services and Other Ops	2,783,264	2,719,411	2,808,714
	Depreciation	405,160	391,950	367,832
	Other Outflows	24,490	25,225	25,981
	Total Expenses	**12,264,996**	**11,617,351**	**12,201,632**
	Operating Income	**846,030**	**344,815**	**326,807**
	Beginning Balance (Audited)	12,832,988	13,679,018	14,023,833
	Operating Income	846,030	344,815	326,807
Ending Fund Balance (incl. Depreciation)		**13,679,018**	**14,023,833**	**14,350,640**
Ending Fund Balance as % of Expenses		**112%**	**121%**	**118%**

vertex EDUCATION

Exhibits

Oakland Military Institute
Income Statement
As of Oct FY2027

	Actual			YTD	Budget & Forecast						
	Aug	Sep	Oct	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
SUMMARY											
Revenue											
LCFF Entitlement	330,571	449,068	804,619	1,584,258	8,152,423	8,152,423	8,356,104	203,681	203,681	6,771,846	19%
Federal Revenue	-	-	-	-	677,941	683,892	676,487	(7,405)	(1,454)	676,487	0%
Other State Revenues	87,803	46,484	142,334	313,931	2,547,310	2,740,506	2,764,673	24,167	217,363	2,450,742	11%
Local Revenues	4,927	6,392	1,648	25,072	298,384	291,500	291,500	-	(6,884)	266,428	9%
Fundraising and Grants	5,000	-	-	5,000	899,566	958,899	1,022,262	63,363	122,696	1,017,262	0%
Total Revenue	**428,302**	**501,944**	**948,601**	**1,928,261**	**12,575,624**	**12,827,220**	**13,111,026**	**283,806**	**535,402**	**11,182,764**	**15%**
Expenses											
Compensation and Benefits	705,388	736,513	808,230	2,532,503	8,045,155	8,214,179	8,187,683	26,495	(142,529)	5,655,180	31%
Books and Supplies	84,918	101,426	42,464	316,435	822,546	832,902	864,399	(31,497)	(41,853)	547,964	37%
Services and Other Operating Expenditures	162,817	285,179	275,226	1,048,892	2,653,811	2,657,345	2,783,264	(125,918)	(129,453)	1,734,371	38%
Depreciation	-	-	-	-	419,663	398,812	405,160	(6,348)	14,503	405,160	0%
Other Outflows & Amortization	-	-	10,377	10,377	24,490	24,490	24,490	-	-	14,113	42%
Total Expenses	**953,123**	**1,123,118**	**1,136,297**	**3,908,207**	**11,965,664**	**12,127,728**	**12,264,996**	**(137,269)**	**(299,332)**	**8,356,789**	**32%**
Net Income	**(524,821)**	**(621,174)**	**(187,696)**	**(1,979,946)**	**609,960**	**699,492**	**846,030**	**146,538**	**236,070**	**2,825,976**	
Fund Balance											
Beginning Balance (Audited)					12,540,252	12,384,265	12,832,988	448,723	292,736		
Net Income					609,960	699,492	846,030	146,538	236,070		
Ending Fund Balance					**13,150,212**	**13,083,757**	**13,679,018**	**595,261**	**528,806**		
Fund Balance as a % of Expenses					110%	108%	112%	4%	2%		

Oakland Military Institute
Income Statement
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	Actual			YTD	Budget & Forecast						
	Aug	Sep	Oct	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
KEY ASSUMPTIONS											
Enrollment Summary											
4-6					65	65	70	5	5		
7-8					145	145	154	9	9		
9-12					305	305	306	1	1		
Total Enrolled					**515**	**515**	**530**	**15**	15		
ADA %											
4-6					94.0%	94.0%	94.0%	0.0%	0.0%		
7-8					94.0%	94.0%	94.0%	0.0%	0.0%		
9-12					94.0%	94.0%	94.0%	0.0%	0.0%		
Average ADA %					**94.0%**	**94.0%**	**94.0%**	**0.0%**	**0.0%**		
ADA											
4-6					61.10	61.10	65.80	4.70	4.70		
7-8					136.30	136.30	144.76	8.46	8.46		
9-12					286.70	286.70	287.64	0.94	0.94		
Total ADA					**484.10**	**484.10**	**498.20**	**14.10**	**14.10**		

Oakland Military Institute
Income Statement
As of Oct FY2027

		Actual			YTD	Budget & Forecast						
		Aug	Sep	Oct	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
REVENUE												
LCFF Entitlement												
8011	Charter Schools General Purpose Entitlement - State Aid	212,075	212,075	381,736	805,886	4,726,296	4,407,828	4,502,443	94,615	(223,853)	3,696,557	18%
8012	Education Protection Account Entitlement	-	-	422,883	422,883	1,429,021	1,727,573	1,777,891	50,317	348,870	1,355,008	24%
8096	Charter Schools in Lieu of Property Taxes	118,496	236,993	-	355,489	1,997,106	2,017,022	2,075,770	58,748	78,664	1,720,281	17%
	SUBTOTAL - LCFF Entitlement	**330,571**	**449,068**	**804,619**	**1,584,258**	**8,152,423**	**8,152,423**	**8,356,104**	**203,681**	**203,681**	**6,771,846**	**19%**
Federal Revenue												
8181	Special Education - Entitlement	-	-	-	-	72,645	72,645	72,645	-	-	72,645	0%
8220	Child Nutrition Programs	-	-	-	-	336,099	340,009	340,009	-	3,910	340,009	0%
8291	Title I	-	-	-	-	208,922	208,922	202,463	(6,459)	(6,459)	202,463	0%
8292	Title II	-	-	-	-	23,300	23,300	22,975	(325)	(325)	22,975	0%
8293	Title III	-	-	-	-	20,982	22,727	22,798	71	1,816	22,798	0%
8294	Title IV	-	-	-	-	15,993	16,289	15,597	(692)	(396)	15,597	0%
	SUBTOTAL - Federal Revenue	**-**	**-**	**-**	**-**	**677,941**	**683,892**	**676,487**	**(7,405)**	**(1,454)**	**676,487**	**0%**
Other State Revenue												
8319	Other State Apportionments - Prior Years	56,077	-	-	56,077	107,346	99,756	99,756	-	(7,589)	43,679	56%
8381	Special Education - Entitlement (State	-	31,758	114,328	177,844	648,694	648,694	667,588	18,894	18,894	489,744	27%
8382	Special Education Reimbursement (State	2,042	2,042	3,675	7,759	42,204	42,506	43,744	1,238	1,540	35,985	18%
8520	Child Nutrition - State	-	-	-	-	151,935	153,703	153,703	-	1,767	153,703	0%
8545	School Facilities Apportionments	-	-	-	-	113,655	113,655	113,655	-	-	113,655	0%
8550	Mandated Cost Reimbursements	-	-	-	-	19,819	20,015	20,015	-	196	20,015	0%
8560	State Lottery Revenue	-	-	-	-	137,529	138,541	142,576	4,035	5,046	142,576	0%
8590	All Other State Revenue	17,000	-	1,500	24,052	921,704	1,115,956	1,115,956	-	194,252	1,091,904	2%
8591	Prop 28 Arts & Music in Schools	5,169	5,169	9,305	19,643	99,604	102,861	102,861	-	3,257	83,218	19%
8593	ELOP	7,515	7,515	13,526	28,556	150,797	150,797	150,797	-	-	122,241	19%
8596	ASES	-	-	-	-	154,022	154,022	154,022	-	-	154,022	0%
	SUBTOTAL - Other State Revenue	**87,803**	**46,484**	**142,334**	**313,931**	**2,547,310**	**2,740,506**	**2,764,673**	**24,167**	**217,363**	**2,450,742**	**11%**
Local Revenue												
8660	Interest	3,171	2,792	648	9,672	36,000	36,000	36,000	-	-	26,328	27%
8670	Student Activities	-	388	-	7,021	25,189	25,189	25,189	-	-	18,168	28%
8699	All Other Local Revenue	1,756	3,213	1,000	8,379	80,000	73,116	73,116	-	(6,884)	64,737	11%
8703	Measure G1	-	-	-	-	157,195	157,195	157,195	-	-	157,195	0%
	SUBTOTAL - Local Revenue	**4,927**	**6,392**	**1,648**	**25,072**	**298,384**	**291,500**	**291,500**	**-**	**(6,884)**	**266,428**	**9%**
Fundraising and Grants												
8803	Fundraising	5,000	-	-	5,000	899,566	958,899	1,022,262	63,363	122,696	1,017,262	0%
	SUBTOTAL - Fundraising and Grants	**5,000**	**-**	**-**	**5,000**	**899,566**	**958,899**	**1,022,262**	**63,363**	**122,696**	**1,017,262**	**0%**
TOTAL REVENUE		**428,302**	**501,944**	**948,601**	**1,928,261**	**12,575,624**	**12,827,220**	**13,111,026**	**283,806**	**535,402**	**11,182,764**	**15%**

Oakland Military Institute
Income Statement
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		Actual			YTD	Budget & Forecast						
		Aug	Sep	Oct	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
EXPENSES												
Compensation & Benefits												
Certificated Salaries												
1100	Teachers Salaries	267,366	275,230	310,582	854,538	2,987,179	3,128,689	2,906,914	221,775	80,265	2,052,376	29%
1103	Teacher - Substitute Pay	26,349	25,688	15,451	67,488	102,505	102,505	303,677	(201,172)	(201,172)	236,189	22%
1200	Certificated Pupil Support Salaries	17,140	17,093	24,885	59,118	189,159	189,159	200,292	(11,134)	(11,134)	141,175	30%
1300	Certificated Supervisor & Administrator Salaries	64,926	62,186	62,186	251,494	745,739	745,739	745,739	-	-	494,245	34%
	SUBTOTAL - Certificated Salaries	**375,781**	**380,197**	**413,104**	**1,232,637**	**4,024,582**	**4,166,092**	**4,156,623**	**9,469**	**(132,041)**	**2,923,986**	**30%**
Classified Salaries												
2100	Classified Instructional Aide Salaries	12,609	12,832	12,354	37,796	175,890	172,158	195,879	(23,721)	(19,989)	158,083	19%
2200	Classified Support Salaries	27,618	35,751	36,082	108,974	324,008	280,910	280,910	-	43,098	171,935	39%
2300	Classified Supervisor & Administrator Salaries	34,875	34,667	30,011	137,330	452,647	452,647	415,601	37,046	37,046	278,272	33%
2400	Classified Clerical & Office Salaries	34,799	35,916	34,768	135,584	354,693	414,309	414,309	-	(59,616)	278,725	33%
2900	Classified Other Salaries	43,205	61,266	62,867	168,694	435,431	435,431	538,150	(102,719)	(102,719)	369,456	31%
	SUBTOTAL - Classified Salaries	**153,107**	**180,432**	**176,083**	**588,378**	**1,742,668**	**1,755,454**	**1,844,849**	**(89,394)**	**(102,181)**	**1,256,471**	**32%**
Employee Benefits												
3100	STRS	70,650	73,773	75,280	222,922	750,274	777,302	741,008	36,294	9,266	518,086	30%
3200	PERS	31,318	36,792	38,031	117,245	326,149	312,335	329,914	(17,579)	(3,765)	212,669	36%
3300	OASDI-Medicare-Alternative	18,353	16,623	17,738	59,501	197,650	200,680	218,576	(17,896)	(20,926)	159,075	27%
3400	Health & Welfare Benefits	50,774	46,499	86,325	302,548	909,743	905,647	796,961	108,686	112,782	494,413	38%
3500	Unemployment Insurance	5,406	2,197	1,669	9,272	30,650	31,532	33,737	(2,205)	(3,087)	24,465	27%
3600	Workers Comp Insurance	-	-	-	-	63,440	65,137	66,016	(879)	(2,576)	66,016	0%
	SUBTOTAL - Employee Benefits	**176,500**	**175,884**	**219,043**	**711,488**	**2,277,905**	**2,292,632**	**2,186,212**	**106,421**	**91,693**	**1,474,723**	**33%**
Books & Supplies												
4200	Books & Other Reference Materials	23,664	2,592	-	46,984	27,023	27,023	50,000	(22,977)	(22,977)	3,016	94%
4320	Educational Software	11,253	27,864	2,470	54,500	61,692	61,692	61,692	-	-	7,192	88%
4325	Instructional Materials & Supplies	10,665	6,800	26,154	56,559	50,470	50,470	75,470	(25,000)	(25,000)	18,911	75%
4330	Office Supplies	281	1,327	25	3,316	15,450	15,450	15,450	-	-	12,134	21%
4352	Graduation	-	-	-	-	10,190	10,190	10,190	-	-	10,190	0%
4410	Classroom Furniture, Equipment & Supplies	20,576	5,162	2,869	29,538	50,000	55,000	30,000	25,000	20,000	462	98%
4420	Computers: individual items less than $5k	8,853	238	-	42,808	95,877	95,877	95,877	-	-	53,069	45%
4430	Non Classroom Related Furniture, Equipment & Supplies	6,926	5,114	8,591	24,125	16,480	16,480	25,000	(8,520)	(8,520)	875	97%
4710	Student Food Services	-	51,750	-	51,750	460,410	465,766	465,766	-	(5,356)	414,016	11%
4720	Other Food	2,699	579	2,355	6,854	34,954	34,954	34,954	-	-	28,100	20%
	SUBTOTAL - Books and Supplies	**84,918**	**101,426**	**42,464**	**316,435**	**822,546**	**832,902**	**864,399**	**(31,497)**	**(41,853)**	**547,964**	**37%**
Services & Other Operating Expenses												
5100	Subagreements for Services	-	-	-	-	100,000	100,000	100,000	-	-	100,000	0%
5200	Travel & Conferences	-	-	-	-	26,000	26,000	26,000	-	-	26,000	0%
5300	Dues & Memberships	2,474	1,893	1,512	11,940	19,397	18,821	17,305	1,517	2,092	5,365	69%
5400	Insurance	18,246	18,246	25,226	61,718	175,827	175,827	175,827	-	-	114,110	35%
5515	Janitorial, Gardening Services & Supplies	10,900	11,199	10,900	61,499	161,347	161,347	161,347	-	-	99,848	38%
5520	Security	4,063	15,852	8,590	47,320	93,242	93,242	93,242	-	-	45,922	51%
5535	Utilities - All Utilities	39,868	13,460	18,534	83,986	196,446	196,446	211,626	(15,180)	(15,180)	127,640	40%
5605	Equipment Leases	1,109	780	4,016	8,637	20,271	20,271	20,271	-	-	11,634	43%

Oakland Military Institute
Income Statement
As of Oct FY2027

		Actual			YTD	Budget & Forecast						
		Aug	Sep	Oct	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
5610	Rent	13,970	15,013	15,013	68,148	170,908	170,908	170,908	-	-	102,759	40%
5611	Prop 39 Related Costs	-	32,500	32,500	65,000	133,900	133,900	130,000	3,900	3,900	65,000	50%
5615	Repairs and Maintenance - Building	18,352	24,176	6,999	97,072	222,850	222,850	222,850	-	-	125,778	44%
5618	Repairs & Maintenance - Auto	-	-	-	-	7,400	7,400	7,400	-	-	7,400	0%
5803	Accounting Fees	-	-	-	-	32,782	32,782	32,782	-	-	32,782	0%
5809	Banking Fees	40	10	10	70	206	206	206	-	-	136	34%
5812	Business Services	-	35,833	17,917	71,667	215,000	215,000	215,000	-	-	143,333	33%
5815	Consultants - Instructional	-	-	6,250	114,099	134,882	134,882	134,882	-	-	20,784	85%
5820	Consultants - Non Instructional - Custom 1	2,850	-	-	2,850	25,000	25,000	27,850	(2,850)	(2,850)	25,000	10%
5824	District Oversight Fees	-	-	53,069	53,069	86,489	86,489	88,650	(2,161)	(2,161)	35,581	60%
5828	Scholarships	-	-	-	-	14,057	14,057	14,057	-	-	14,057	0%
5830	Field Trips Expenses	8,453	10,953	-	19,540	20,000	20,000	40,000	(20,000)	(20,000)	20,460	49%
5833	Fines and Penalties	-	-	-	55	2,060	2,060	2,060	-	-	2,005	3%
5836	Fingerprinting	756	588	672	2,688	4,326	4,326	4,326	-	-	1,638	62%
5845	Legal Fees	5,202	8,295	4,200	19,447	101,156	101,156	101,156	-	-	81,709	19%
5851	Marketing and Student Recruiting	217	15,202	13,403	50,039	109,070	110,680	118,180	(7,500)	(9,110)	68,141	42%
5857	Payroll Fees	4,620	3,619	3,733	17,398	10,300	10,300	60,000	(49,700)	(49,700)	42,602	29%
5861	Prior Yr Exp (not accrued	11,980	12,302	-	24,282	-	-	24,282	(24,282)	(24,282)	-	100%
5863	Professional Development	4,364	18,252	178	24,993	37,695	40,195	44,195	(4,000)	(6,500)	19,203	57%
5869	Special Education Contract Instructors	-	9,436	21,084	30,520	110,000	110,000	110,000	-	-	79,480	28%
5872	Special Education Encroachment	-	1,062	3,822	5,946	17,568	17,568	17,568	-	-	11,622	34%
5874	Sports	100	5,504	3,427	13,120	30,385	30,385	30,385	-	-	17,265	43%
5877	Student Activities	-	-	3,428	3,728	15,450	15,450	15,450	-	-	11,722	24%
5878	Student Assessment	-	-	-	-	17,544	17,544	17,544	-	-	17,544	0%
5880	Student Health Services	-	-	-	-	8,355	8,355	8,355	-	-	8,355	0%
5881	Student Information System	-	1,881	350	2,231	6,360	6,360	11,118	(4,758)	(4,758)	8,887	20%
5884	Substitutes	-	255	2,040	2,295	32,960	32,960	32,960	-	-	30,665	7%
5887	Technology Services	10,340	4,728	-	18,803	46,609	46,609	47,416	(807)	(807)	28,613	40%
5893	Transportation - Student	323	2,397	10,459	13,329	29,396	29,396	29,396	-	-	16,067	45%
5898	Bad Debt Expense	-	-	-	-	11,986	11,986	11,986	-	-	11,986	0%
5899	Miscellaneous Operating Expenses	1,302	-	193	11,525	114,259	114,259	114,259	-	-	102,734	10%
5900	Communications	2,574	21,744	7,704	41,163	83,882	83,882	83,979	(97)	(97)	42,815	49%
5915	Postage and Delivery	715	-	-	715	8,446	8,446	8,446	-	-	7,731	8%
	SUBTOTAL - Services & Other Operating Exp.	**162,817**	**285,179**	**275,226**	**1,048,892**	**2,653,811**	**2,657,345**	**2,783,264**	**(125,918)**	**(129,453)**	**1,734,371**	**38%**
Capital Outlay & Depreciation												
6900	Depreciation	-	-	-	-	419,663	398,812	405,160	(6,348)	14,503	405,160	0%
	SUBTOTAL - Capital Outlay & Depreciation	**-**	**-**	**-**	**-**	**419,663**	**398,812**	**405,160**	**(6,348)**	**14,503**	**405,160**	**0%**
Other Outflows & Amortization												
7438	Debt Service - Interest	-	-	10,377	10,377	24,490	24,490	24,490	-	-	14,113	42%
	SUBTOTAL - Other Outflows & Amortization	**-**	**-**	**10,377**	**10,377**	**24,490**	**24,490**	**24,490**	**-**	**-**	**14,113**	**42%**
TOTAL EXPENSES		**953,123**	**1,123,118**	**1,136,297**	**3,908,207**	**11,965,664**	**12,127,728**	**12,264,996**	**(137,269)**	**(299,332)**	**8,356,789**	**32%**

Oakland Military Institute

Monthly Cash Forecast

As of Oct FY2027

	2026-27 Actuals & Forecast													
	Jul Actuals	**Aug** Actuals	**Sep** Actuals	**Oct** Actuals	**Nov** Forecast	**Dec** Forecast	**Jan** Forecast	**Feb** Forecast	**Mar** Forecast	**Apr** Forecast	**May** Forecast	**Jun** Forecast	**Forecast**	**Remaining Balance**
Beginning Cash	**3,382,789**	**3,846,436**	**3,630,253**	**3,175,269**	**2,908,847**	**3,079,098**	**2,686,778**	**2,966,912**	**2,682,186**	**2,469,263**	**2,847,841**	**2,740,831**		
REVENUE														
LCFF Entitlement	-	330,571	449,068	804,619	539,732	539,731	962,614	539,731	591,918	1,231,677	588,973	588,973	8,356,104	1,188,497
Federal Revenue	-	-	-	-	99,959	34,001	34,001	99,959	34,001	70,323	99,959	34,001	676,487	170,283
Other State Revenue	37,310	87,803	46,484	142,334	270,573	119,962	159,626	132,247	169,767	79,342	203,432	596,074	2,764,673	719,720
Other Local Revenue	12,104	4,927	6,392	1,648	8,836	24,788	6,508	6,508	46,824	6,508	6,508	159,946	291,500	-
Fundraising & Grants	-	5,000	-	-	-	4,513	158,290	-	-	-	-	699,998	1,022,262	154,461
TOTAL REVENUE	**49,414**	**428,302**	**501,944**	**948,601**	**919,100**	**722,995**	**1,321,039**	**778,446**	**842,509**	**1,387,851**	**898,873**	**2,078,992**	**13,111,026**	**2,232,960**
EXPENSES														
Certificated Salaries	63,555	375,781	380,197	413,104	375,964	390,123	390,123	390,123	390,123	390,123	399,123	198,286	4,156,623	-
Classified Salaries	78,755	153,107	180,432	176,083	124,562	162,167	162,167	162,167	162,167	162,167	162,167	158,910	1,844,849	-
Employee Benefits	140,062	176,500	175,884	219,043	243,900	190,883	204,377	192,570	192,570	184,694	186,487	79,244	2,186,212	-
Books & Supplies	87,628	84,918	101,426	42,464	53,935	56,355	59,196	74,825	59,853	56,800	55,515	53,857	864,399	77,628
Services & Other Operating Expenses	325,670	162,817	285,179	275,226	126,076	304,174	213,420	231,857	239,080	203,842	190,934	223,759	2,783,264	1,230
Capital Outlay & Depreciation	-	-	-	-	168,817	33,763	33,763	33,763	33,763	33,763	33,763	33,763	405,160	-
Other Outflows	-	-	-	10,377	(2,134)	1,624	1,615	1,607	1,599	1,590	1,582	1,574	24,490	5,056
TOTAL EXPENSES	**695,670**	**953,123**	**1,123,118**	**1,136,297**	**1,091,120**	**1,139,087**	**1,064,661**	**1,086,911**	**1,079,154**	**1,032,979**	**1,029,571**	**749,392**	**12,264,996**	**83,914**
Operating Cash Inflow (Outflow)	**(646,256)**	**(524,821)**	**(621,174)**	**(187,696)**	**(172,021)**	**(416,092)**	**256,378**	**(308,465)**	**(236,645)**	**354,872**	**(130,698)**	**1,329,600**	**846,030**	**2,149,047**
Accounts Receivable	1,013,411	410,509	29,401	30,488	691,138	-	-	-	-	-	-	-		
Other Current Assets	88,130	(20,679)	(18,346)	-	-	-	-	-	-	-	-	-		
Fixed Assets	(36,339)	(162,328)	(49,529)	-	25,849	33,763	33,763	33,763	33,763	33,763	33,763	33,763		
Other Assets	-	30,828	-	-	-	-	-	-	-	-	-	-		
Accounts Payable	7,901	(90,157)	10,271	(41,453)	(177,163)	-	-	-	-	-	-	-		
Other Current Liabilities	26,503	83,092	4,218	(56,177)	(87,843)	-	-	-	-	-	-	-		
Loans Payable (Current)	-	-	-	-	(60,002)	-	-	-	-	-	-	-		
Deferred Revenue	10,297	57,373	190,173	(11,585)	-	-	-	-	-	-	-	(1,004,822)		
Loans Payable (Long-Term)	-	-	-	-	(49,707)	(9,991)	(10,008)	(10,024)	(10,041)	(10,058)	(10,075)	(10,091)		
Ending Cash	**3,846,436**	**3,630,253**	**3,175,269**	**2,908,847**	**3,079,098**	**2,686,778**	**2,966,912**	**2,682,186**	**2,469,263**	**2,847,841**	**2,740,831**	**3,089,281**		

Oakland Military Institute

Balance Sheet

As of Oct FY2027

	Jun FY26	Oct FY27	Projected Jun FY27
ASSETS			
Cash Balance	3,382,789	2,913,544	3,093,978
Accounts Receivable	2,284,710	800,901	2,342,723
Other Current Assets	91,642	42,537	42,537
Fixed Assets	9,196,194	9,444,390	9,182,198
Other Assets	15,651	(15,177)	(15,177)
ROU Assets	786,401	786,401	786,401
TOTAL ASSETS	**15,757,387**	**13,972,595**	**15,432,660**
LIABILITIES & EQUITY			
Accounts Payable	290,600	177,163	83,914
Other Current Liabilities	41,321	98,958	11,115
Loans Payable (Current)	152,595	152,595	-
ROU Current Liabilities	-	-	92,593
Deferred Revenue	758,564	1,004,822	-
Loans Payable (Long-Term)	977,650	977,650	857,655
ROU Long-Term Liabilities	708,365	708,365	708,365
Beginning Net Assets	12,384,533	12,832,988	12,832,988
Net Income (Loss) to Date	443,758	(1,979,946)	846,030
TOTAL LIABILITIES & EQUITY	**15,757,387**	**13,972,595**	**15,432,660**

Oakland Military Institute

Multi-year Projection

As of Oct FY2027

	Year 1 2026-27	Year 2 2027-28	Year 3 2028-29
SUMMARY			
Revenue			
LCFF Entitlement	8,356,104	8,567,888	9,284,957
Federal Revenue	676,487	690,892	700,674
Other State Revenues	2,764,673	2,254,900	2,094,322
Local Revenues	291,500	291,500	291,500
Fundraising and Grants	1,022,262	156,986	156,986
Total Revenue	**13,111,026**	**11,962,166**	**12,528,439**
Expenses			
Compensation and Benefits	8,187,683	7,616,184	8,098,587
Books and Supplies	864,399	864,581	900,518
Services and Other Operating Expenditures	2,783,264	2,719,411	2,808,714
Depreciation	405,160	391,950	367,832
Other Outflows & Amortization	24,490	25,225	25,981
Total Expenses	**12,264,996**	**11,617,351**	**12,201,633**
Net Income	**846,030**	**344,815**	**326,806**
Fund Balance			
Beginning Balance (Audited)	12,832,988	13,679,018	14,023,833
Net Income	846,030	344,815	326,806
Ending Fund Balance	**13,679,018**	**14,023,833**	**14,350,638**
Total Revenue Per ADA	26,317	24,239	24,233
Total Expenses Per ADA	24,619	23,541	23,601
Net Income Per ADA	1,698	699	632
Fund Balance as a % of Expenses	112%	121%	118%

Oakland Military Institute

Multi-year Projection

As of Oct FY2027

	Year 1 2026-27	Year 2 2027-28	Year 3 2028-29
Key Assumptions			
Enrollment Breakdown			
6	70	70	70
7	75	70	70
8	79	75	75
9	110	90	100
10	82	90	95
11	63	70	75
12	51	60	65
Total Enrolled	**530**	**525**	**550**
ADA %			
4-6	94.0%	94.0%	94.0%
7-8	94.0%	94.0%	94.0%
9-12	94.0%	94.0%	94.0%
Average ADA %	**94.0%**	**94.0%**	**94.0%**
ADA			
4-6	66	66	66
7-8	145	136	136
9-12	288	291	315
Total ADA	**498**	**494**	**517**

Oakland Military Institute
Multi-year Projection
As of Oct FY2027

		Year 1 2026-27	Year 2 2027-28	Year 3 2028-29
REVENUE				
LCFF Entitlement				
8011	Charter Schools General Purpose Entitlement - State Aid	4,502,443	4,692,465	5,166,098
8012	Education Protection Account Entitlement	1,777,891	1,819,236	1,964,758
8096	Charter Schools in Lieu of Property Taxes	2,075,770	2,056,187	2,154,101
	SUBTOTAL - LCFF Entitlement	**8,356,104**	**8,567,888**	**9,284,957**
Federal Revenue				
8181	Special Education - Entitlement	72,645	76,850	76,125
8220	Child Nutrition Programs	340,009	350,209	360,716
8291	Title I	202,463	202,463	202,463
8292	Title II	22,975	22,975	22,975
8293	Title III	22,798	22,798	22,798
8294	Title IV	15,597	15,597	15,597
	SUBTOTAL - Federal Revenue	**676,487**	**690,892**	**700,674**
Other State Revenue				
8319	Other State Apportionments - Prior Years	99,756	-	-
8381	Special Education - Entitlement (State	667,588	667,588	692,780
8382	Special Education Reimbursement (State	43,744	44,761	48,341
8520	Child Nutrition - State	153,703	158,314	163,063
8545	School Facilities Apportionments	113,655	117,406	121,033
8550	Mandated Cost Reimbursements	20,015	22,606	23,355
8560	State Lottery Revenue	142,576	141,231	147,956
8590	All Other State Revenue	1,115,956	676,064	472,069
8591	Prop 28 Arts & Music in Schools	102,861	108,841	107,852
8593	ELOP	150,797	164,067	163,850
8596	ASES	154,022	154,022	154,022
	SUBTOTAL - Other State Revenue	**2,764,673**	**2,254,900**	**2,094,322**
Local Revenue				
8660	Interest	36,000	36,000	36,000
8670	Student Activities	25,189	25,189	25,189
8699	All Other Local Revenue	73,116	73,116	73,116
8703	Measure G1	157,195	157,195	157,195
	SUBTOTAL - Local Revenue	**291,500**	**291,500**	**291,500**
Fundraising and Grants				
8803	Fundraising	1,022,262	156,986	156,986
	SUBTOTAL - Fundraising and Grants	**1,022,262**	**156,986**	**156,986**
TOTAL REVENUE		**13,111,026**	**11,962,166**	**12,528,439**

Oakland Military Institute
Multi-year Projection
As of Oct FY2027

		Year 1 2026-27	Year 2 2027-28	Year 3 2028-29
EXPENSES				
Compensation & Benefits				
Certificated Salaries				
1100	Teachers Salaries	2,906,914	2,819,396	3,068,466
1103	Teacher - Substitute Pay	303,677	307,253	310,826
1200	Certificated Pupil Support Salaries	200,292	200,994	207,109
1300	Certificated Supervisor & Administrator Salaries	745,739	750,681	755,775
	SUBTOTAL - Certificated Salaries	**4,156,623**	**4,078,324**	**4,342,177**
Classified Salaries				
2100	Classified Instructional Aide Salaries	195,879	193,441	194,551
2200	Classified Support Salaries	280,910	283,863	285,200
2300	Classified Supervisor & Administrator Salaries	415,601	425,862	437,228
2400	Classified Clerical & Office Salaries	414,309	427,782	439,901
2900	Classified Other Salaries	538,150	-	-
	SUBTOTAL - Classified Salaries	**1,844,849**	**1,330,949**	**1,356,881**
Employee Benefits				
3100	STRS	741,008	725,288	774,896
3200	PERS	329,914	341,417	336,673
3300	OASDI-Medicare-Alternative	218,576	178,376	184,441
3400	Health & Welfare Benefits	796,961	875,647	1,013,267
3500	Unemployment Insurance	33,737	26,681	27,563
3600	Workers Comp Insurance	66,016	59,502	62,690
	SUBTOTAL - Employee Benefits	**2,186,212**	**2,206,910**	**2,399,530**
Books & Supplies				
4200	Books & Other Reference Materials	50,000	51,500	53,045
4320	Educational Software	61,692	63,543	75,449
4325	Instructional Materials & Supplies	75,470	51,984	53,544
4330	Office Supplies	15,450	15,914	16,391
4352	Graduation	10,190	10,496	10,811
4410	Classroom Furniture, Equipment & Supplies	30,000	30,900	31,827
4420	Computers: individual items less than $5k	95,877	98,753	101,716
4430	Non Classroom Related Furniture, Equipment & Supplies	25,000	25,750	26,523
4710	Student Food Services	465,766	479,739	494,131
4720	Other Food	34,954	36,002	37,082
	SUBTOTAL - Books and Supplies	**864,399**	**864,581**	**900,518**
Services & Other Operating Expenses				
5100	Subagreements for Services	100,000	103,000	106,090
5200	Travel & Conferences	26,000	26,780	27,583
5300	Dues & Memberships	17,305	17,824	18,359
5400	Insurance	175,827	181,102	186,535
5515	Janitorial, Gardening Services & Supplies	161,347	166,187	171,173
5520	Security	93,242	96,040	98,921

Oakland Military Institute

Multi-year Projection

As of Oct FY2027

		Year 1 2026-27	Year 2 2027-28	Year 3 2028-29
5535	Utilities - All Utilities	211,626	217,975	224,514
5605	Equipment Leases	20,271	20,879	21,505
5610	Rent	170,908	176,035	181,316
5611	Prop 39 Related Costs	130,000	130,000	140,000
5615	Repairs and Maintenance - Building	222,850	208,324	214,574
5618	Repairs & Maintenance - Auto	7,400	7,622	7,851
5803	Accounting Fees	32,782	33,765	34,778
5809	Banking Fees	206	212	219
5812	Business Services	215,000	215,000	215,000
5815	Consultants - Instructional	134,882	138,929	143,097
5820	Consultants - Non Instructional - Custom 1	27,850	25,750	26,523
5824	District Oversight Fees	88,650	93,624	104,503
5828	Scholarships	14,057	14,479	14,913
5830	Field Trips Expenses	40,000	15,450	15,914
5833	Fines and Penalties	2,060	2,122	2,185
5836	Fingerprinting	4,326	4,456	4,589
5845	Legal Fees	101,156	104,191	107,317
5851	Marketing and Student Recruiting	118,180	121,725	125,377
5857	Payroll Fees	60,000	61,800	63,654
5861	Prior Yr Exp (not accrued	24,282	-	-
5863	Professional Development	44,195	42,946	44,235
5869	Special Education Contract Instructors	110,000	113,300	116,699
5872	Special Education Encroachment	17,568	18,095	18,638
5874	Sports	30,385	31,297	32,235
5877	Student Activities	15,450	15,914	16,391
5878	Student Assessment	17,544	18,070	18,612
5880	Student Health Services	8,355	8,605	8,863
5881	Student Information System	11,118	6,302	6,491
5884	Substitutes	32,960	33,949	34,967
5887	Technology Services	47,416	48,838	50,304
5893	Transportation - Student	29,396	30,278	31,186
5898	Bad Debt Expense	11,986	12,345	12,716
5899	Miscellaneous Operating Expenses	114,259	61,005	62,835
5900	Communications	83,979	86,498	89,093
5915	Postage and Delivery	8,446	8,699	8,960
	SUBTOTAL - Services & Other Operating Exp.	**2,783,264**	**2,719,411**	**2,808,714**
Depreciation Expense				
6900	Depreciation	405,160	391,950	367,832
	SUBTOTAL - Depreciation Expense	**405,160**	**391,950**	**367,832**
Other Outflows & Amortization				
7438	Debt Service - Interest	24,490	25,225	25,981
	SUBTOTAL - Other Outflows & Amortization	**24,490**	**25,225**	**25,981**
TOTAL EXPENSES		**12,264,996**	**11,617,351**	**12,201,633**

Coversheet

Consideration of Employee Cost of Living Allowance for 2026-2027 (COLA)

Section: IV. Items
Item: B. Consideration of Employee Cost of Living Allowance for 2026-2027 (COLA)
Purpose: Vote
Submitted by: Mary Streshly
Related Material: OMI-Salary Increases Slide.pdf

BACKGROUND:

It is important for the Board to annually consider cost of living allowances for staff. Our CFO, Jessika Welcome, will present the Board with a sound budget with healthy reserves; therefore she will concur with the superintendent in recommending a more substantial raise to offset the significant strains of Bay Area cost of living.

RECOMMENDATION:

It is the recommendation of the superintendent and staff that the Board approve a 5% COLA for the 2026-2027 school year.

MYP Cost of Increase to Salary Schedules

Increase	2026-27	2027-28	2028-29
4%	+$271K	+$250K	+$263K
5%	+$339K	+$312K	+$328K
6%	+$407K	+$375K	+$395K

Coversheet

Superintendent's Contract

Section: IV. Items
Item: C. Superintendent's Contract
Purpose: Vote
Submitted by: Jerry Brown
Related Material: Superintendent employment agreement addendum Nov 19, 2026 (1).pdf

BACKGROUND:

Commensurate with the Board approved 2026-2027 cost of living salary increase for all OMI Classified, Certificated and Management personnel, the Superintendent will also receive the same cost of living salary increase for the same contract year

Oakland Military Institute College Preparatory Academy
SUPERINTENDENT EMPLOYMENT AGREEMENT
ADDENDUM
November 19, 2026

This Addendum ("Addendum") is made and entered into by the Governing Board of the Oakland Military Institute College Preparatory Academy ("OMI Board") and Mary Streshly Ed.D. ("Superintendent") in accordance with the Superintendent's Employment Agreement, executed on January 17, 2023 (hereinafter "Employment Agreement"). Specifically, the terms of this Addendum to the Employment Agreement are as follows:

1. Term. The District and the Superintendent executed the Employment Agreement on January 17, 2023 for the period commencing on the first day of February 1, 2023, ending on June 30, 2026. In an Addendum dated February 1, 2024 the term of the Employment Agreement was extended to June 30, 2027. The term shall extend to June 30, 2028.

2. Salary. Commensurate with the Board approved cost of living salary increase of 5% for the 2025-26 school year for all OMI Classified, Certificated and Management personnel, the Superintendent will also receive a 5% cost of living salary increase for the same contract year.

3. Review. The Superintendent has had the opportunity to obtain independent legal or other professional advice with regard to this Addendum, including tax, retirement and/or other legal consequences. The Superintendent acknowledges that the terms of this Addendum have been read and fully explained and that those terms are fully understood and voluntarily accepted.

The Employment Agreement executed on January 17, 2023 is hereby modified by this Addendum, and as such, constitutes the entire understanding and agreement between the Parties. No addition to, or modification of any term or provision of the Employment Agreement or this Addendum shall be effective unless it is set forth in writing, signed by the Parties and duly approved by the OMI Board.

_____ Date_____	_____ Date_____
Mary Streshly, Ed.D.	Honorable Edmund Gerald Brown,Jr.
Superintendent	Chairman of the OMI Board

Coversheet

Approve Main Audit + Measure G1 Audit Report

Section: IV. Items
Item: D. Approve Main Audit + Measure G1 Audit Report
Purpose: Vote
Submitted by: Carlos Rodriguez
Related Material:
Oakland Military Institute College Preparatory Academy - Audit Report - FINAL - June 30, 2026.pdf
Oakland Military Institute College Preparatory Academy G-1 - Audit Report - FINAL - June 30, 2026 1.pdf

BACKGROUND:

CDWL will present our annual audit findings.

RECOMMENDATION:

It is the recommendation of the supertintendent and staff that the board approve the 2025-2026 audit.

CWDL

See what's possible.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY

AUDIT REPORT

JUNE 30, 2026

858-387-2500
www.cwdl.com

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
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JUNE 30, 2026

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CWDL

INDEPENDENT AUDITORS' REPORT

To the Board of Directors
Oakland Military Institute College Preparatory Academy
Oakland, California

Report on the Audit of the Financial Statements

Opinion

We have audited the accompanying financial statements of Oakland Military Institute College Preparatory Academy (the "Academy"), as of and for the year ended June 30, 2026, and the related notes to financial statements, which collectively comprise the Academy's financial statements as listed in the table of contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Academy as of June 30, 2026, and the changes in its financial position and cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Academy and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America; and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Academy's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards, we*:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Academy's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Academy's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Supplementary Information

Our audit was conducted for the purpose of forming opinion on the financial statements that collectively comprise the Academy's basic financial statements. The supplementary information as listed in the table of contents, is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with GAAS. In our opinion, the supplementary information, is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated November 13, 2026, on our consideration of the Academy's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements, and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Academy's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Academy's internal control over financial reporting and compliance.

CWDL, Certified Public Accountants

San Diego, California
November 13, 2026

FINANCIAL SECTION

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
STATEMENT OF FINANCIAL POSITION
JUNE 30, 2026

ASSETS		
Current assets:		
Cash and cash equivalents	$	3,387,485
Accounts receivable		2,284,711
Prepaid expenses		91,642
Other assets		15,651
Total Current assets		5,779,489
Non-current assets:		
Capital assets, net		9,196,194
Right-of-use assets		786,401
Total Non-current assets		9,982,595
TOTAL ASSETS	$	15,762,084
LIABILITIES AND NET ASSETS		
Current liabilities:		
Accounts payable	$	331,922
Deferred revenue		758,564
Notes payable, current portion		60,002
Lease liabilities, current portion		92,593
Total Current liabilities		1,243,081
Non-current liabilities:		
Lease liabilities, non-current portion		708,365
Notes payable, non-current portion		977,650
Total Non-current liabilities		1,686,015
Total Liabilities		2,929,096
Net assets:		
Without donor restriction		12,832,988
Total Net assets		12,832,988
TOTAL LIABILITIES AND NET ASSETS	$	15,762,084

The accompanying notes to financial statements are an integral part of these statements.

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OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS
FOR THE YEAR ENDED JUNE 30, 2026

	Without Donor Restriction
SUPPORT AND REVENUES	
Federal and state support revenues:	
Local control funding formula, state aid	$ 5,608,950
Federal revenues	688,336
Other state revenues	2,040,298
Total Federal and state support and revenues	8,337,584
Local support and revenues:	
Payments in lieu of property taxes	1,974,940
Interest income	33,419
Other local revenues	1,392,727
Total Local support and revenues	3,401,086
TOTAL SUPPORT AND REVENUES	11,738,670
EXPENSES	
Program services	9,851,277
Management and general	1,438,940
TOTAL EXPENSES	11,290,217
CHANGE IN NET ASSETS	448,453
NET ASSETS, BEGINNING OF YEAR	12,384,535
NET ASSETS, END OF YEAR	$ 12,832,988

The accompanying notes to financial statements are an integral part of these statements.

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OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2026

	Program Services	Management and General	Total
EXPENSES			
Personnel expenses:			
Salaries and wages	$ 4,878,572	$ 548,036	$ 5,426,608
Pension expense	861,301	144,960	1,006,261
Payroll taxes	259,956	18,555	278,511
Other employee benefits	787,508	17,914	805,422
Total Personnel expenses	6,787,337	729,465	7,516,802
Non-personnel expenses:			
Legal expenses	-	123,049	123,049
Accounting expenses	-	42,768	42,768
Instructional materials	225,864	-	225,864
Other fees for services	1,646,297	425,433	2,071,730
Occupancy expense	36,335	-	36,335
Travel expense	1,043	1,796	2,839
Interest expense	-	66,982	66,982
Depreciation	246,514	-	246,514
Amortization	231,057	-	231,057
Insurance expense	224,154	-	224,154
Bad debt expense	-	11,410	11,410
Other expenses	452,676	38,037	490,713
Total non-personnel expenses	3,063,940	709,475	3,773,415
TOTAL EXPENSES	$ 9,851,277	$ 1,438,940	$ 11,290,217

The accompanying notes to financial statements are an integral part of these statements.

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OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
STATEMENT OF CASH FLOWS
FOR THE YEAR ENDED JUNE 30, 2026

CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets	$	448,453
Adjustments to reconcile change in net assets to net cash provided by/(used in) operating activities:		
Depreciation		246,514
Interest on lease liability		45,052
Amortization		231,057
Changes in operating assets and liabilities:		
Accounts receivable		(104,427)
Prepaid expenses		65,954
Other assets		(15,651)
Accounts payable		(302,552)
Deferred revenue		132,381
Net cash provided by/(used in) operating activities		746,781
CASH FLOWS FROM INVESTING ACTIVITIES		
Purchase of capital assets		(257,421)
Net cash provided by/(used in) investing activities		(257,421)
CASH FLOWS FROM FINANCING ACTIVITIES		
Principal payments on debt		(58,826)
Payment of lease liability		(272,469)
Net cash provided by/(used in) financing activities		(331,295)
NET INCREASE/(DECREASE) IN CASH AND CASH EQUIVALENTS		158,065
CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR		3,229,420
CASH AND CASH EQUIVALENTS, END OF YEAR	$	3,387,485
SUPPLEMENTAL DISCLOSURE OF NON-CASH FINANCING ACTIVITIES		
Cash paid for interest	$	21,930

The accompanying notes to financial statements are an integral part of these statements.

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OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2026

NOTE 1 – SIGNIFICANT ACCOUNTING POLICIES

Reporting Entity

Oakland Military Institute College Preparatory Academy (the "Academy") was incorporated in the state of California in 2000 as a nonprofit public benefit corporation that is organized under the Nonprofit Public Benefit Corporation Law exclusively for charitable and educational purposes within the meaning of 501(c)(3) of the *Internal Revenue Code* of 1954 or the corresponding provision of any future United States internal revenue law. The Academy's mission is to provide a structured, rigorous academic program where students are developed as leaders, scholars and critical thinker citizens. Through a military framework, the Academy inspires honor and pride within its students and cultivates life-long respect, confidence, and appreciation for others. The Academy provides instruction to Grades 6-12 students.

Basis of Accounting

The Academy's policy is to prepare its financial statements on the accrual basis of accounting; consequently, revenues are recognized when earned rather than when cash is received, and certain expenses and purchases of assets are recognized when the obligation is incurred rather than when cash is disbursed.

Basis of Presentation

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America as prescribed by the Financial Accounting Standards Board (FASB).

Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures, such as depreciation expense and the net book value of capital assets. Accordingly, actual results could differ from those estimates.

Functional Allocation of Expenses

Costs of providing the Academy's programs and other activities have been presented in the Statement of Functional Expenses. During the year, such costs are accumulated into separate groupings as either personnel or non-personnel expenses. Personnel or non-personnel expenses are allocated among program services and management and general expenses by a method that best measures the relative degree of benefit.

Cash and Cash Equivalents

The Academy defines its cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2026

NOTE 1 – SIGNIFICANT ACCOUNTING POLICIES, continued

Accounts Receivable

Accounts receivable primarily represent amounts due from federal and state governments as of June 30, 2026. Management evaluates the collectability of receivables and records an allowance for doubtful accounts when amounts are considered uncollectible.

During the year ended June 30, 2026, management recorded bad debt expense of $11,410 to reflect estimated uncollectible amounts. Management believes the remaining receivables are fully collectible as of June 30, 2026.

Prepaid Expenses

Prepaid expenses are recorded at the carrying amount as of financial position date. Prepaid expenses are made in advance of when the economic benefit of the cost will be realized, and which will be expensed in future periods with the passage of time or when a triggering event occurs.

Right-of-Use Assets and Lease Liabilities

The Academy has recorded Right-of-Use ("ROU") assets and lease liabilities as a result of implementing the FASB issued Accounting Standards Update (ASU) 2016-02, *Leases* (Topic 842). ROU assets represent the right to use an underlying asset for the lease term and lease liabilities represent the obligation to make lease payments arising from the lease. ROU assets and lease liabilities are recognized at the lease commencement date and are based on the present value of lease payments over the lease term. As most leases do not provide an implicit rate, a risk-free rate is utilized in lieu of determining an incremental borrowing rate at the commencement date in deciding the present value of lease payments. ROU assets also include any lease payments made and exclude lease incentives. Amortization expense is recognized on a straight-line basis over the lease term. Lease agreements with lease and non-lease components are generally accounted for separately.

Capital Assets

Capital assets are stated at cost, if purchased or at estimated fair value, if donated. Depreciation is provided on a straight-line basis over the estimated useful lives of the asset. The useful lives range varies from 3 to 50 years.

Accounts Payable and Notes Payable

All payables are reported as liabilities in the Statement of Financial Position. In general, all payables that, once incurred, are paid in a timely manner and in full from current financial resources are reported as obligations of the Academy. Accounts payable are amounts owed to vendors or suppliers at June 30, 2026, for services incurred related to the Academy's operations and are reported as current liabilities. Notes payable that are due within one year are reported as current liabilities, while portion that are due more than one year are reported as non-current liabilities.

NOTE 1 – SIGNIFICANT ACCOUNTING POLICIES, continued

Deferred Revenue

The Academy recognizes grant revenues in the period the Academy meets the conditions for revenue recognition, namely as reimbursable program expenses are incurred. Deferred Revenue relates to program receipts from government agencies in advance of program performance.

Net Asset

Net assets, revenues, expenses, gains, and losses are classified based on the existence or absence of donor or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions – Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions.

Net Assets With Donor Restrictions – Net assets subject to donor- (or certain grantor-) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

Revenue Recognition

Amounts received from the California Department of Education are conditional and recognized as revenue by the Academy based on the average daily attendance (ADA) of students. Revenue that is restricted is recorded as an increase in net assets without donor restriction, if the restriction expires in the reporting period in which the revenue is recognized. All other restricted revenues are reported as increases in net assets with donor restriction.

Contributions

All contributions are considered to be available for use unless specifically restricted by the donor. Amounts received that are restricted to specific use or future periods are reported as contributions with donor restrictions. Restricted contributions that are received and released in the same period are reported as promises to give without donor restrictions. Unconditional promises to give expected to be received in one year or less are recorded at net realizable value. Unconditional promises to give expected to be received in more than one year are recorded at fair value at the date of the promise. Conditional promises to give are not recognized until they become unconditional, that is, when the conditions on which they depend are substantially met.

NOTE 1 – SIGNIFICANT ACCOUNTING POLICIES, continued

Conditional Grants

Grants and contracts that are conditioned upon the performance of certain requirements or the incurrence of allowable qualifying expenses are recognized as revenues in the period in which the conditions are met. Amounts received are recognized as revenue when the Academy has incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as deferred revenues in the Statement of Financial Position. As of June 30, 2026, the Academy has conditional grants of $1,047,341 of which $758,564 is recognized as deferred revenue in the Statement of Financial Position.

Payment in Lieu of Property Taxes

Secured property taxes attach as an enforceable lien on property as of January 1. Taxes are levied on September 1 and are payable in two installments on or before November 1 and February 1. Unsecured property taxes are not a lien against real property and are payable in one installment on or before August 31. The County bills and collects property taxes for all taxing agencies within the County and distributes these collections to the various agencies. The sponsor agency of the Academy is required by law to provide in-lieu property tax payments on a monthly basis, from August through July. The amount paid per month is based upon an allocation per student, with a specific percentage to be paid each month.

Donated Services and In-Kind Contributions

Volunteers contribute significant amounts of time to program services, administration, and fundraising activities; however, the financial statements do not reflect the value of these contributed services because they do not meet the recognition criteria prescribed by generally accepted accounting principles. Contributed goods are recorded at their fair value on the date of donation. Donated professional services are recorded at the respective fair values of the services received.

During the year, the Academy received support from the Military Department without a commensurate monetary outlay. These support services have been valued at $2.95 million based on expenditure information provided by the Military Department. Contributed services are measured and reported at their estimated fair value in the financial statements, using current rates for comparable professional services, and have been included in the accompanying financial statements.

Income Taxes

The Academy is a nonprofit entity exempt from the payment of income taxes under *Internal Revenue Code* Section 501(C)3 and *California Revenue and Taxation Code* Section 23701d. Accordingly, no provision has been made for income taxes. The Academy is subject to income tax on net income that is derived from business activities that are unrelated to the exempt purposes. The Academy files an exempt Academy return and applicable unrelated business income tax return in the U.S. federal jurisdiction and with the California Franchise Tax Board.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2026

NOTE 2 – LIQUIDITY AND AVAILABILITY

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the Statement of Financial Position date. Financial assets available for general expenditures comprise cash and cash equivalents, accounts receivable, prepaid expenses and other assets for the total amount of $5,779,489.

As part of the Academy's liquidity management plan, they invest cash in excess of daily requirements in short-term investments, certificate of deposits, and money market funds.

NOTE 3 – CONCENTRATION OF CREDIT RISK

The Academy maintains cash balances held in banks and revolving funds which are insured up to $250,000 by the Federal Deposit Insurance Corporation (FDIC). At times, cash in these accounts exceeds the insured amounts. At June 30, 2026, deposits in excess of the FDIC limit amount to approximately $3,420,431. The Academy has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on its cash and cash equivalents.

NOTE 4 – CAPITAL ASSETS

Capital assets in the accompanying financial statements is presented net of accumulated depreciation. The Academy capitalizes all expenditure for land, buildings, and equipment in excess of $1,000. Depreciation expense was $246,514 for the year ended June 30, 2026.

The components of capital assets as of June 30, 2026 are as follows:

	Balance July 1, 2025	Additions	Deductions	Balance June 30, 2026
Capital assets not being depreciated				
Construction in progress	$ -	$ 39,456	$ -	$ 39,456
Total Capital assets not being depreciated	-	39,456	-	39,456
Capital assets being depreciated				
Land improvements	13,847,952	-	-	13,847,952
Furniture and equipment	1,552,283	82,284	-	1,634,567
Buildings	583,098	-	-	583,098
Leasehold Improvements	-	135,681	-	135,681
Total Capital assets being depreciated	15,983,333	217,965	-	16,201,298
Less: Accumulated depreciation	(6,798,046)	(246,514)	-	(7,044,560)
Capital assets, net	$ 9,185,287	$ 10,907	$ -	$ 9,196,194

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NOTE 5 – LEASES

The Academy leases certain real property and equipment for the operation of charter schools with various terms under long-term, non-cancelable operating lease agreements. The leases expire at various dates through the year 2033 and provide renewal options. The Academy included in the determination of the right-of-use assets and lease liabilities any renewal options when the options are reasonably certain to be exercised. The agreements generally require the Academy to pay insurance and repairs.

The Academy elected the option to use the risk-free rate determined using a period comparable to the lease terms as the discount rate.

The Academy has elected the short-term lease exemption for all leases with a term of twelve (12) months or less for both existing and ongoing operating leases to not recognize the asset and liability for these leases. Lease payments for short-term leases are recognized on straight-line basis. The Academy has real property short-term lease agreements for the year ended June 30, 2026.

The Academy elected the practical expedient to not separate lease and non-lease components for real estate leases.

The total operating lease cost for the year ended June 30, 2026 is $272,469. The supplemental cash flow information for the year ended June 30, 2026 is as follows:

Operating cash flows from operating leases	$ 272,469

The following summarizes the weighted-average remaining lease term and weighted-average discount rate:

Weighted-average remaining lease term:	
Operating leases	7 years
Weighted-average discount rate:	
Operating leases	5%

The future minimum lease payments under non-cancelable operating leases with terms greater than one year are listed below as of June 30, 2026.

Year Ending June 30,	Operating lease
2027	$ 129,996
2028	129,996
2029	129,996
2030	140,004
2031	140,004
Thereafter	280,008
Total Lease payments	950,004
Less: Interest	(149,046)
Present value of lease liabilities	$ 800,958

The Academy receives no sublease rental revenues or pays any contingent rentals associated with these leases.

NOTE 6 – EMPLOYEE RETIREMENT

Multiemployer Defined Benefit Pension Plans

Qualified employees are covered under multiemployer defined benefit pension plans maintained by agencies of the state of California.

The risks of participating in these multiemployer defined benefit pension plans are different from single employer plans because: (a) assets contributed to the multiemployer plan by one employer may be used to provide benefits to employees of other participating employers, (b) the required member, employer, and state contribution rates are set by the California Legislature, and (c) if the Academy chooses to stop participating in the multiemployer plan, it may be required to pay a withdrawal liability to the plan. The Academy has no plans to withdraw from this multiemployer plan.

California State Teachers' Retirement System (CalSTRS)

Plan Description

The Academy contributes to the California State Teachers' Retirement System (CalSTRS), a cost-sharing multiemployer public employee retirement system defined benefit pension plan administered by STRS. Plan information for STRS is not publicly available. The plan provides retirement, disability and survivor benefits to beneficiaries. Benefit provisions are established by state statutes, as legislatively amended, within the State Teachers' Retirement Law. According to the most recently available Comprehensive Annual Financial Report and Actuarial Valuation Report for the year ended June 30, 2025 total STRS plan net assets are $350 billion, the total actuarial present value of accumulated plan benefits is $499 billion, contributions from all employers totaled $8.50 billion, and the plan is 79.3% funded. The Academy did not contribute more than 5% of the total contributions to the plan.

Copies of the STRS annual financial reports may be obtained from STRS, 7667 Folsom Boulevard, Sacramento, CA 95826 and www.calstrs.com.

Funding Policy

Active plan members hired before January 1, 2013 are required to contribute 10.25% of their salary and those hired after are required to contribute 10.21% of their salary. The Academy is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by the STRS Teachers' Retirement Board. The required employer contribution rate for year ended June 30, 2026 was 19.1% of annual payroll. The contribution requirements of the plan members are established and may be amended by state statute.

NOTE 6 – EMPLOYEE RETIREMENT, continued

California State Teachers' Retirement System (CalSTRS), continued

Funding Policy, continued

The Academy's contributions to CalSTRS for the past three years are as follows:

	Contribution	Percent of Required Contribution
2026	$ 669,456	100%
2025	$ 657,354	100%
2024	$ 739,630	100%

California Public Employees' Retirement System (CalPERS)

Plan Description

The Academy contributes to the School Employer Pool under the California Public Employees' Retirement System (CalPERS), a cost-sharing multiemployer public employee retirement system defined benefit pension plan administered by CalPERS. Plan information for PERS is not publicly available. The plan provides retirement and disability benefits, annual cost-of-living adjustments, and death benefits to plan members and beneficiaries. Benefit provisions are established by state statutes, as legislatively amended, within the Public Employees' Retirement Law. According to the most recently available Actuarial Valuation Report for the year ended June 30, 2025 the School Employer Pool total plan assets are $105.6 billion, the present value of accumulated plan benefits is $138.5 billion, contributions from all employers totaled $5.7 billion, and the plan is 76.2% funded. The Academy did not contribute more than 5% of the total contributions to the plan.

Copies of the CalPERS' annual financial reports may be obtained from the CalPERS Executive Office, 400 Q Street, Sacramento, CA 95811 and www.calpers.ca.gov.

Funding Policy

Active plan members are required to contribute 7.0% of their salary. The school is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by the CalPERS Board of Administration. The required employer contribution rate for year ended June 30, 2026 was 26.81%. The contribution requirements of the plan members are established and may be amended by state statute.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2026

NOTE 6 – EMPLOYEE RETIREMENT, continued

California Public Employees' Retirement System (CalPERS), continued

Funding Policy, continued

The Academy's contributions to CalPERS for each of the last three years are as follows:

	Contribution	Percent of Required Contribution
2026	$ 336,805	100%
2025	$ 322,041	100%
2024	$ 316,874	100%

NOTE 7 – ACCOUNTS PAYABLE

Accounts payable at June 30, 2026 consist of vendor payables, accrued payables and other related liabilities of $331,922.

NOTE 8 – NOTES PAYABLE

California School Finance Authority

The Academy received $1,701,907 in matching funds pursuant a funding agreement between the State Allocation Board and the California School Finance Authority collectively referred to as the State. The Academy applied to the State for financing of its charter school facilities project under the Charter School Facilities Program (CSFP) established pursuant to Article 12 of Chapter 12.5 of Part 10 of the *California Education Code*. The matching loan amount is amortized over 28 years at an interest rate of 2 percent per annum.

Debt service requirements for the loan as of June 30, 2026, are as follows:

Year Ending June 30,	Amount
2027	$ 60,002
2028	61,203
2029	62,427
2030	63,675
2031	64,949
Thereafter	725,396
Total Notes payable	$ 1,037,652

NOTE 9 – CONTINGENCIES AND COMMITMENTS

The Academy has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any required reimbursement would not be material.

NOTE 10 – FUNCTIONALIZED EXPENSES

The financial statements report certain categories of expenses that are attributed to more than one program or supporting function. Therefore, expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include salaries and wages, pension expense, other employee benefits, and payroll taxes, which are allocated on the basis of estimates of time and effort.

NOTE 11 – SUBSEQUENT EVENTS

The Academy's management has evaluated events or transactions that may occur for potential recognition or disclosure in the financial statements through November 13, 2026, which is the date the financial statements were available to be issued. The Management concluded that no subsequent events have occurred that would require recognition or disclosure in the financial statements.

SUPPLEMENTARY INFORMATION

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
SCHEDULE OF INSTRUCTIONAL TIME
FOR THE YEAR ENDED JUNE 30, 2026

		2025-26	Number of Days		
	Minutes	Actual	Traditional	Multitrack	
Grade Level	Requirement	Minutes	Calendar	Calendar	Status
Grade 6	54,000	64,425	180	N/A	Complied
Grade 7	54,000	64,425	180	N/A	Complied
Grade 8	54,000	64,425	180	N/A	Complied
Grade 9	64,800	70,950	180	N/A	Complied
Grade 10	64,800	70,950	180	N/A	Complied
Grade 11	64,800	70,950	180	N/A	Complied
Grade 12	64,800	70,950	180	N/A	Complied

The Academy participated in Longer Day incentives and is funded at a level for an Academy that has not met or exceeded its LCFF target funding.

See accompanying note to supplementary information.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
SCHEDULE OF AVERAGE DAILY ATTENDANCE
FOR THE YEAR ENDED JUNE 30, 2026

	Second Period Report	Annual Report
Classroom-Based ADA:		
Grades 4 through 6	59.41	62.41
Grades 7 and 8	161.12	165.49
Grades 9 through 12	252.30	259.06
Total Classroom-Based ADA	472.83	486.96

See accompanying note to supplementary information.

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OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
RECONCILIATION OF ANNUAL FINANCIAL AND BUDGET REPORT WITH AUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED JUNE 30, 2026

There were no reconciling items to the audited financial statements for the year ended June 30, 2026.

See accompanying note to supplementary information.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
NOTE TO SUPPLEMENTARY INFORMATION
JUNE 30, 2026

NOTE 1 – PURPOSE OF SCHEDULES

Schedule of Instructional Time

This schedule presents information on the amount of instructional time offered by the Academy and whether the Academy complied with the provisions of *California Education Code*.

Schedule of Average Daily Attendance

Average daily attendance is a measurement of the number of pupils attending classes of the Academy. The purpose of attendance accounting from a fiscal standpoint is to provide the basis on which apportionments of state funds are made to charter schools. This schedule provides information regarding the attendance of students at various grade levels.

Reconciliation of Annual Financial and Budget Report with Audited Financial Statements

This schedule provides the information necessary to reconcile the net assets of the Academy as reported on the annual financial report form to the audited financial statements.

OTHER INFORMATION

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
ACADEMY ORGANIZATIONAL STRUCTURE
JUNE 30, 2026

The Academy was granted in 2000 by Oakland Unified School District (the "District"). The District has granted the Academy through June 30, 2026. During 2025-26, the Academy served approximately 480 students in grades 6 to 12. The Academy's Charter School number granted by the state is 0349.

The board of directors and the administrator as of the year ended June 30, 2026 were as follows:

GOVERNING BOARD

Name	Office	Term Expiration
Honorable Edmund Gerald Brown Jr.	Board Chairman	June 30, 2027
Marc Mares	Vice Chairman	June 30, 2028
Simón Bryce	Board Secretary	June 30, 2028
Anne Campbell Washington	OUSD Appointed Board Member	June 30, 2027
David Clisham	Board Member	June 30, 2028
Joseph Wire	Board Member	June 30, 2027
BG (CA) Peter Cross	Board Member	June 30, 2027

ADMINISTRATION

Dr. Mary E. Streshly, Ed.D.
Chief Executive Officer

CMSgt (CA) Thomas L. James
Chief Financial Officer

OTHER INDEPENDENT AUDITORS' REPORTS

CWDL

INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

To the Board of Directors
Oakland Military Institute College Preparatory Academy
Oakland, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Oakland Military Institute College Preparatory Academy (the "Academy") as of and for the year ended June 30, 2026, and the related notes to financial statements, which collectively comprise the Academy's basic financial statements, and have issued our report thereon dated November 13, 2026.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Academy's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Academy's internal control. Accordingly, we do not express an opinion on the effectiveness of the Academy's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements, on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Academy's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Academy's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of non-compliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of This Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Academy's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Academy's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

CWDL, Certified Public Accountants

San Diego, California
November 13, 2026

CWDL

INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE AND ON INTERNAL CONTROL OVER COMPLIANCE FOR STATE PROGRAMS

To the Board of Directors
Oakland Military Institute College Preparatory Academy
Oakland, California

Report on State Compliance

Opinion

We have audited Oakland Military Institute College Preparatory Academy (the "Academy") compliance with the requirements specified in the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, applicable to the Academy's state program requirements identified in the table below for the year ended June 30, 2026.

In our opinion, the Academy complied, in all material respects, with the compliance requirements referred to above that are applicable to the laws and regulations of the state programs identified in the table below for the year ended June 30, 2026.

Basis for Opinion

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States; and the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Our responsibilities under those standards and compliance requirements are further described in the Auditors' Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Academy and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion. Our audit does not provide a legal determination of the Academy's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above, and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to the Academy's state programs.

Auditors' Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Academy's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Academy's compliance with the requirements of the applicable state programs as a whole.

In performing an audit in accordance with GAAS*, Government Auditing Standards,* and *the 2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the Academy's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the Academy's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, but not for the purpose of expressing an opinion on the effectiveness of the Academy's internal control over compliance. Accordingly, no such opinion is expressed.
- Select and test transactions and records to determine the Academy's compliance with the state laws and regulations applicable to the following items:

PROGRAM NAME	PROCEDURES PERFORMED
School Districts, County Offices of Education, and Charter Schools:	
T. Proposition 28 Arts and Music in Schools	Yes
U. After/Before School Education and Safety Program	Yes
V. Proper Expenditure of Education Protection Account Funds	Yes
W. Unduplicated Local Control Funding Formula Pupil Counts	Yes
X. Local Control and Accountability Plan	Yes
Y. Independent Study-Course Based	Not Applicable
Z. Immunizations	Not Applicable
AZ. Educator Effectiveness	Not Applicable
CZ. Career Technical Education Incentive Grant	Not Applicable
DZ. Expanded Learning Opportunities Program	Yes
EZ. Transitional Kindergarten	Not Applicable
FZ. Kindergarten Continuance	Not Applicable
GZ. Comprehensive School Safety Plan	Yes
HZ. Attendance Recovery	Not Applicable

PROGRAM NAME	PROCEDURES PERFORMED
Charter Schools:	
AA. Attendance	Yes
BB. Mode of Instruction	Yes
CC. Nonclassroom-Based Instruction/Independent Study	Not Applicable
DD. Determination of Funding for Nonclassroom-Based Instruction	Not Applicable
EE. Annual Instructional Minutes - Classroom Based	Yes
FF. Charter School Facility Grant Program	Yes

The term "Not applicable" is used above to mean either the Academy did not offer the program during the current fiscal year or did not receive any funding for the program.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control over Compliance

A *deficiency in internal control* over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance on a timely basis. A *material weakness in internal control* over *compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a compliance requirement will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditors' Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Accordingly, this report is not suitable for any other purpose.

CWDL, Certified Public Accountants

San Diego, California
November 13, 2026

SCHEDULE OF FINDINGS AND QUESTIONED COSTS

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
SUMMARY OF AUDITORS' RESULTS
FOR THE YEAR ENDED JUNE 30, 2026

FINANCIAL STATEMENTS

Type of auditors' report issued	Unmodified
Is a going concern emphasis-of-matter paragraph included in the auditors' report?	No
Internal control over financial reporting:	
Material weaknesses identified?	No
Significant deficiencies identified not considered to be material weaknesses?	None Reported
Non-compliance material to financial statements noted?	No

FEDERAL AWARDS

The Academy did not expend more that $1,000,000 in federal awards; therefore, a Federal Single Audit under OMB Uniform Grant Guidance is not applicable.

STATE AWARDS

Internal control over state programs:	
Material weaknesses identified?	No
Significant deficiencies identified not considered to be material weaknesses?	None Reported
Type of auditors' report issued on compliance for state programs	Unmodified

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
FINANCIAL STATEMENT FINDINGS AND RECOMMENDATIONS
FOR THE YEAR ENDED JUNE 30, 2026

FIVE DIGIT CODE	AB3627 FINDING TYPES
20000	Inventory of Equipment
30000	Internal Control

There were no audit findings and recommendations related to the financial statements for the year ended June 30, 2026.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
STATE AWARD FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2026

FIVE DIGIT CODE	AB3627 FINDING TYPES
10000	Attendance
40000	State Compliance
42000	Charter School Facilities Program
43000	Apprenticeship: Related and Supplemental Instruction
60000	Miscellaneous
61000	Classroom Teacher Salaries
62000	Local Control Accountability Plan
70000	Instructional Materials
71000	Teacher Misassignments
72000	School Accountability Report Card

There were no state awards findings and questioned costs for the year ended June 30, 2026.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS
FOR THE YEAR ENDED JUNE 30, 2026

There were no audit findings and questioned costs during fiscal year 2025.

CWDL

See what's possible.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
MEASURE G1 PARCEL TAX FUND
ELECTION 2016

PERFORMANCE AUDIT

JUNE 30, 2026

858-387-2500
www.cwdl.com

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
MEASURE G1 PARCEL TAX FUND ELECTION 2016
PERFORMANCE AUDIT
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FOR THE YEAR ENDED JUNE 30, 2026

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Section I – General Information 2
Section II – Performance Audit Procedures 3
Section III – Findings and Conclusions 4

CWDL

INDEPENDENT AUDITORS' REPORT
ON PERFORMANCE

Board of Directors
Measure G1 Parcel Tax Fund Oversight Committee
Oakland Military Institute College Preparatory Academy
Oakland, California

Oakland Military Institute College Preparatory Academy Measure G1 Audit Report 2025-26

We are pleased to present the Oakland Military Institute College Preparatory Academy's Measure G1 Performance Audit Report 2025-26. We have completed performance audit procedures specified by the Oakland Unified School District as it relates to the Teacher Retention and Middle School Improvement Act Fund Measure G1 Parcel Tax granted to the Oakland Military Institute College Preparatory Academy (the "Academy") for the fiscal year ended June 30, 2026.

Management's Responsibility

Management of the Academy is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to the Teacher Retention and Middle School Improvement Act Fund Measure G1 Parcel Tax grant (the "Measure G1 Grant").

Auditor's Responsibility

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

Additional Information

General information about the Academy, the Measure G1 Grant and the performance audit procedures performed as well as findings and conclusions resulting from such procedures are further described in the accompanying Performance Audit Results following this Report on Performance.

CWDL, Certified Public Accountants

San Diego, California
November 13, 2026

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OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
MEASURE G1 PARCEL TAX FUND ELECTION 2016
PERFORMANCE AUDIT
FOR THE YEAR ENDED JUNE 30, 2026

SECTION I - GENERAL INFORMATION

BACKGROUND

Oakland Military Institute College Preparatory Academy (the "Academy"), was incorporated in the state of California in 2000 as a nonprofit public benefit corporation that is organized under the Nonprofit Public Benefit Corporation Law exclusively for charitable and educational purposes within the meaning of 501(c)(3) of the Internal Revenue Code of 1954 or the corresponding provision of any future United States internal revenue law. The Academy's mission is to provide a structured, rigorous academic program where students are developed as leaders, scholars and critical thinker citizens. Through a military framework, the Academy inspires honor and pride within its students and cultivates life-long respect, confidence, and appreciation for others. The Academy provides instruction for Grades 6-12 students.

TEACHER RETENTION AND MIDDLE SCHOOL IMPROVEMENT ACT FUND MEASURE G1 PARCEL TAX

On an election held on November 8, 2016, the Oakland Unified School District Measure G1 Parcel Tax passed with an over two-thirds majority vote. The measure is to levy a tax of $120 per parcel, providing $12.4 million annually, for 12 years, with exemptions for senior and low-income residents.

The Teacher Retention and Middle School Improvement Act Fund ("Measure G1") was established to provide a salary increase to school-site educators and middle school grants in Oakland Unified School District (the "District") schools as well as charter schools in Oakland. Measure G1 requires the District to secure an independent financial auditor to prepare a report ("Report") to be filed with the Board of Education and made publicly available no later than December 31 of each year. In order to meet this deadline, all schools must submit reports/responses to the independent auditor.

The final Report must include the following:

- The amount collected and expended in such year.
- The description of all programs funded, and a determination that the monies expended were for the allowable uses stated in this Measure; and
- The determination that the revenues left over after the raise provided to school-site educators generated by this Measure are being used to supplement, and not supplant, unrestricted general fund revenue so appropriated to schools to serve pupils in grades 6 through 8 based on fiscal year 2025-26 funding.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
MEASURE G1 PARCEL TAX FUND ELECTION 2016
PERFORMANCE AUDIT
FOR THE YEAR ENDED JUNE 30, 2026

SECTION II – PERFORMANCE AUDIT PROCEDURES

OBJECTIVES OF THE AUDIT

- Ensure proceeds and expenditures of the parcel tax are fully accounted in the books and records of the academy school.
- Ensure expenditures are in support of allowable uses as per the ballot language, separately with respect to middle school grants and salary for school site educators.
- Ensure that the academy school receiving middle school grant funding has an approved education improvement plan with the minimal requirements specified in the ballot.
- For the academy school receiving middle school grant funding, make a positive statement about the issue of supplanting versus supplementing.

SCOPE OF THE AUDIT

Academy school expenditures funded by Measure G1 during fiscal year 2025-26.

METHODOLOGY

1. Obtain parcel tax expenditure detail reports prepared by the academy school and agree amounts to the general ledger.
2. Select a sample of payroll related expenditures and obtain and review the necessary supporting documentation to satisfy ourselves that they were only to provide raises to "school site educators," as the term is used in the ballot text. Test payroll benefits for reasonableness.
3. Ensure the same percentage increase in salary was applied to all school site educators.
4. Review the nature of the expenditures incurred by the academy school sites, and review source documents as appropriate, to ensure they were within the specific purposes of the ballot language.
5. Verify if the parcel tax is funding supplemental activities by performing the following procedures: a) Ascertain if funds were used to provide services which were legally required to be made available by virtue of being a school; and b) Also, perform procedures to ascertain whether the parcel tax funded services that were previously provided with another funding source.
6. Obtain the approved education improvement plans for the academy school and perform the following procedures: Ensure the plan contains the minimal elements required by the ballot; b) Verify if the actual parcel tax expenditures are consistent with the approved plan.
7. Determine, from the expenditure testing performed, if there were any a) control deficiencies, b) significant deficiencies or c) material weaknesses in internal control noted. To the extent there are deficiencies noted, prepare a separate report to the District listing the weakness noted and the recommended corrective action.
8. Examine supporting documentation to validate the amount of Measure G1 Parcel Tax revenues received.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
MEASURE G1 PARCEL TAX FUND ELECTION 2016
PERFORMANCE AUDIT
FOR THE YEAR ENDED JUNE 30, 2026

SECTION III – FINDINGS AND CONCLUSIONS

OBTAINING AN UNDERSTANDING

Researching the Measure G1 ballot language and performance audit requirements previously mentioned.

- Requesting a copy of the approved education improvement plan or other documentation, such as a Measure G1 Funding Grant Request/Application, specific to Oakland Military Institute College Preparatory Academy.
- Reviewing meeting minutes of the public meeting held by the Oakland Unified School District's Measure G1 Oversight Committee.
- Obtaining and reviewing a copy of the Measure G1 Certification Form submitted to Oakland Unified School District as signed by the school representative on June 02, 2026, as well as the Measure G1 Charter Reimbursement Request Form submitted and signed by the school representative on June 02, 2026.
- Obtaining all supporting documentation as it pertains to the Measure G1 Certification Form and the Measure G1 Charter Reimbursement Request Form.
- Obtaining an understanding of internal controls over payroll and human resources of Oakland Military Institute College Preparatory Academy as it pertains to management of salaries and benefits charged to Oakland Military Institute College Preparatory Academy as well as internal controls over cash disbursements as it pertains to non-personnel costs charged.

OUTCOME OF PERFORMANCE PROCEDURES

1. Detailed information on funding and expenditures associated with the Measure G1 grant agreed to general ledger information maintained for Oakland Military Institute College Preparatory Academy.

2. We selected a sample of 12 employees from a total of 69 with salary incentives charged to the Measure G1 grant. We reviewed supporting documentation, such as payroll register reports and tax reporting forms (W-2 forms), to ensure all individuals are valid school employees, and all employees were deemed to be "school site educators."

3. Based on review of the payroll incentive calculation, funding was fully expended on a 1.75% percentage increase for employees at the school site.

4. The Measure G1 Certification Form and related salary spreadsheet supporting expenditures charged to Measure G1 noted all funding expended on 2025-26 base salaries.

5. Through review of payroll records and personnel documentation, the funds appeared to supplement and not supplant educational activities as the additional bonus to school site personnel would not otherwise be available or required had Measure G1 funding not been available to the Academy.

OAKLAND MILITARY INSTITUTE COLLEGE PREPARATORY ACADEMY
MEASURE G1 PARCEL TAX FUND ELECTION 2016
PERFORMANCE AUDIT
FOR THE YEAR ENDED JUNE 30, 2026

SECTION III – FINDINGS AND CONCLUSIONS, continued

OUTCOME OF PERFORMANCE PROCEDURES, continued

6. Auditor reviewed education improvement plans related to and approved use of actual expenditures charted to the Measure G1 Grant were Consistent with the Academy's approved plan. The Academy increased the Middle School music staff and the Middle School Mental Health Counseling. The funding expenditure was in line with the Academy's intention to offer additional faculty support to students. Per Auditor review the faculty expenditures charged for reimbursement were compared to the Academy's initial application and funding request information to verify that the funding was consistent with the approved plan. Funding expenditure appeared in line with the Academy's plan.

7. Based on our testing of payroll controls, there were no instances that would warrant a separate report on internal control weaknesses.

8. Through reviews of funding awarded and the Measure G1 Certification Form, the Measure G1 Charter Reimbursement Request Form, and related salary spreadsheet and other expenditures noting actual costs of $146,078, Measure G1 Parcel Tax revenues are confirmed as $94,083.

CONCLUSION

The following conclusions and recommendations were made as it pertains directly to the program objectives:

- We ensured the proceeds and expenditures of the Measure G1 Grant are fully accounted in the books and records of Oakland Military Institute College Preparatory Academy. There are no recommendations associated with this specific objective.
- We ensured 2025-26 expenditures are in support of allowable uses as per the ballot language and separately with respect to middle school grants and salary for school site educators. There are no recommendations associated with this specific objective.
- We reviewed the LCAP and proposed education improvements plan to confirm agreement with the goals of the Measure G1 Grant. There were no recommendations associated with this specific element.
- We conclude that all expenditures charged to the Measure G1 Grant were to supplement and not supplant current or required services or programs. There are no recommendations associated with this specific element.

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Coversheet

High Impact Tutor Model Update & Core Growth result for 2026

Section: IV. Items
Item: E. High Impact Tutor Model Update & Core Growth result for 2026
Purpose: FYI
Submitted by:
Related Material: Math Tutor Update.pdf
OMI_Growth_Report_2025-26_Final_Combined.pdf

BACKGROUND:

Per Board direction, our Chief Academic Officer will regularly provide updates regarding our math tutoring program.

Math Tutor Update

Chief Academic Officer- Zandra Texeira

The Program

What needed to be addressed:

- Tutor schedules were not consistent
  - Too much free time
- Cadets were being pulled from academic classes and missing instruction or falling behind on assignments

How we Improved

- Tutors have set schedules daily
- Tutoring provided 3 ways
    - Push in (small group)
    - Math +
    - Pull out (2:1)

What we Still Need

- More effective use of after school time
- Increase # of students who receive tutoring
- Literacy tutoring

Oakland Military Institute

Student Growth Report, 2025–26

College Preparatory Academy · grades 6–12 · 223 middle school and 51 grade 11 students with SBAC scores in 2025–26

What is growth?

Achievement

Where are students right now?

The percent of students who **met or exceeded the standard** on the SBAC test. It's a snapshot of one point in time, and it depends a lot on where students started.

Growth

How much did students move this year?

How much students **improved from one year to the next**, compared with students who started in a similar place. For **11th graders**, growth is measured from their **8th-grade score three years earlier** to 11th grade, since the SBAC isn't given in grades 9 and 10. A school can have low achievement and high growth when it is helping students catch up.

How CORE measures growth

Each student is compared with a **peer group** of students who look like them on:

- Prior SBAC score (last year's; 8th grade for 11th graders)
- English Learner status
- Socioeconomically disadvantaged status
- Special education status
- Foster youth and homeless status
- The academic and demographic profile of their school

Students are ranked within their peer group by how much they grew. Those rankings are combined into one **growth percentile** for the school, from 0 to 100 (50 is average).

> Example: in 2025–26, OMI's middle school ELA growth percentile was **98**. That means OMI students grew more than students at about **98 out of 100** schools serving similar students.

How to read the colors

0–30	31–70	71–100
Below average growth	Average growth	Above average growth

OMI at a glance

growth percentile by year

	2022–23	2023–24	2024–25	2025–26
Middle school ELA n = 168 (2025–26)	97	92	87	98
Middle school math n = 168 (2025–26)	70	51	78	100
High school ELA n = 43 (2025–26)	100	100	98	95
High school math n = 43 (2025–26)	95	97	92	95

n = students with growth scores in the most recent year. Middle school and high school results follow on separate pages.

Growth = CORE Student Growth Percentile (SGP). % met standard = CORE SBAC proficiency (met or exceeded). Source: CORE Data Collaborative, BigQuery core_prod (dashboard_school_level, dashboard_district_level, scale_scores_school_level), most recent upload for each year (11/9/2026). Middle school = grades 6–8; high school = grade 11. Comparison schools: three Oakland schools that also serve grades 6–12, plus Oakland Unified district-wide. Patterns, not proof of cause.

Oakland Military Institute

Middle School (grades 6–8): 2025–26 growth

Highlighted Areas of Success

- **Proficiency up in 2025–26:** Math 10% → 29% (+19).
- **ELA growth above average every year** from 2022–23 to 2025–26.
- **Among CORE360 similar schools:** #2 of 11 in ELA growth and #1 of 11 in math growth.
- **Highest ELA and math growth** among Oakland 6–12 schools and Oakland Unified (98 and 100).

1 2025–26 growth

98 ELA **100** Math

Students grew more than students at about **98 of 100** similar schools in ELA and **100 of 100** in math.

+19

points in math proficiency (10% → 29%) in 2025–26, with 2 straight years of above-average math growth. ELA: 27% → 30%.

2 Four-year growth and achievement

Average growth since 2022–23: **ELA 94 · Math 75**

	2022–23	2023–24	2024–25	2025–26
ELA growth	97	92	87	98
% met standard	31%	25%	27%	30%
Math growth	70	51	78	100
% met standard	18%	13%	10%	29%
Students with growth scores	144	193	202	168

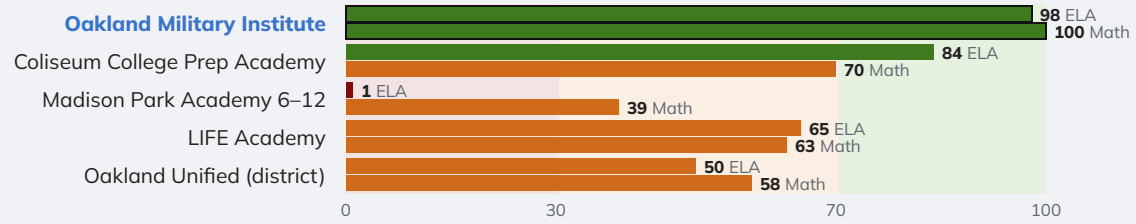
3 How OMI compares with CORE360 similar schools, 2025–26

OMI is **#2 of 11** in ELA and **#1 of 11** in math growth.

School (sorted by ELA + math growth)	ELA growth	Math growth
Lodestar Lighthouse CCPS	100	99
Oakland Military Institute OMI College Prep	98 #2	100 #1
Coliseum College Prep Academy Oakland USD	84	70
Animo James B. Taylor Charter Middle Green Dot	92	58
Lighthouse Community Charter Lighthouse CCPS	75	71
Audubon K-8 San Diego USD	68	77
Everett Middle San Francisco USD	49	68
Animo Mae Jemison Charter Middle Green Dot	46	55
Izaak Walton Intermediate Garden Grove USD	48	35
United for Success Academy Middle Oakland USD	17	27
Perkins K-8 San Diego USD	1	5
Oakland Unified (district-wide) *benchmark, not ranked*	50	58

4 How OMI compares with Oakland 6–12 schools, 2025–26

OMI's middle school growth is **the highest** in ELA and **the highest** in math.



Growth = CORE Student Growth Percentile; % met standard = CORE SBAC proficiency. MS = grades 6–8; HS = grade 11, with growth measured from 8th grade (three years earlier). Similar schools: CORE360 Similar Schools Report 2025–26, chosen separately for MS and HS. Oakland 6–12 schools: three Oakland schools that also serve grades 6–12. Source: CORE BigQuery core_prod, most recent upload (11/9/2026). Patterns, not proof of cause.

Oakland Military Institute

High School (grades 9–12): 2025–26 growth

Highlighted Areas of Success

- **Proficiency up in 2025–26:** Math 15% → 33% (+18); ELA 58% → 80% (+22).
- **ELA and math growth above average every year** from 2022–23 to 2025–26.
- **Among CORE360 similar schools:** tied for #2 of 11 in ELA growth and #3 of 11 in math growth.
- **Highest ELA and math growth** among Oakland 6–12 schools and Oakland Unified (95 and 95).

1 2025–26 growth

95 ELA **95** Math

Students grew more than students at about **95 of 100** similar schools in ELA and **95 of 100** in math.

+18

points in math proficiency (15% → 33%) in 2025–26, with 4 straight years of above-average math growth. ELA: 58% → 80%.

2 Four-year growth and achievement

Average growth since 2022–23: **ELA 98 · Math 95**

	2022–23	2023–24	2024–25	2025–26
ELA growth	100	100	98	95
% met standard	76%	63%	58%	80%
Math growth	95	97	92	95
% met standard	16%	13%	15%	33%
Students with growth scores	58	53	44	43

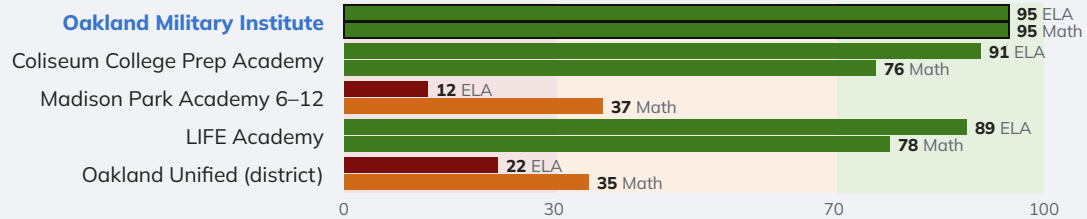
3 How OMI compares with CORE360 similar schools, 2025–26

OMI is **tied for #2 of 11** in ELA and **#3 of 11** in math growth.

School (sorted by ELA + math growth)	ELA growth	Math growth
Oakland Unity High Oakland Unity	95	99
Oakland Military Institute OMI College Prep	95 T-#2	95 #3
Animo South Los Angeles Charter Green Dot	97	92
Luskin Academy High Alliance CRPS	79	96
Ouchi-O'Donovan 6–12 Alliance CRPS	84	89
Coliseum College Prep Academy Oakland USD	91	76
Shaheen Health Services Academy Alliance CRPS	91	72
Simon Technology Academy High Alliance CRPS	64	62
Madison Park Academy 6–12 Oakland USD	12	37
Marie L. Hare High Garden Grove USD	9	17
Farber School of Credit Attainment Fresno USD	0	9
Oakland Unified (district-wide) *benchmark, not ranked*	22	35

4 How OMI compares with Oakland 6–12 schools, 2025–26

OMI's high school growth is **the highest** in ELA and **the highest** in math.



Growth = CORE Student Growth Percentile; % met standard = CORE SBAC proficiency. MS = grades 6–8; HS = grade 11, with growth measured from 8th grade (three years earlier). Similar schools: CORE360 Similar Schools Report 2025–26, chosen separately for MS and HS. Oakland 6–12 schools: three Oakland schools that also serve grades 6–12. Source: CORE BigQuery core_prod, most recent upload (11/9/2026). Patterns, not proof of cause.

Coversheet

2026-2027 Williams Monitoring Facilities Report

Section: IV. Items
Item: F. 2026-2027 Williams Monitoring Facilities Report
Purpose: FYI
Submitted by: Zandra Texeira
Related Material: OMI_Facility_Report_2026-27.pdf

BACKGROUND:

Under Assembly Bill 559, schools eligible for annual Williams monitoring include those identified for Comprehensive Support and Improvement (CSI) or Additional Targeted Support and Improvement (ATSI) under the Every Student Succeeds Act (ESSA), low-performing schools under the Elementary and Secondary Education Act (ESEA), and schools where 15 percent or more of teachers lack a preliminary or clear California teaching credential.

During the annual review cycle, the County Office of Education evaluates compliance across the following statutory areas:

- **Instructional Materials Sufficiency.** County teams visit classrooms within the first few weeks of the school year to verify that every student has sufficient, state-standards-aligned textbooks and instructional materials in core subjects.
- **School Facilities Conditions.** Inspectors evaluate school buildings and grounds using the Facility Inspection Tool (FIT) to ensure campuses are clean, safe, and maintained in "good repair".
- **Teacher Assignments and Vacancies.** The County Office reviews staffing data to identify any teacher misassignments or unfilled vacancies.
- **School Accountability Report Card (SARC).** Reviewers verify the accuracy of data reported on each school's SARC regarding instructional materials and facility maintenance.
- **Uniform Complaint Procedures (UCP).** Districts are monitored to confirm that multilingual Williams UCP notices are posted in every classroom and that quarterly complaint summaries are submitted to the County Superintendent.

RECOMMENDATION:

It is the recommendation of the superintendent and staff that the board hear the findings of the Williams report for facilities.

ALAMEDA COUNTY OFFICE OF EDUCATION

School Facility Conditions Report

2026-27 School Year

Oakland Military Institute, College Preparatory Academy

Oakland Unified | CDS 01612590130617

Overall Rating: GOOD at 91.83%. The inspection records deficiencies in 26 of 53 evaluated areas. Interior (75.47%), Electrical (79.25%) and Restrooms / Fountains (79.93%) rank FAIR; the other five categories rank GOOD.

Initial inspection	July 31, 2026 at 8:00 a.m.
Inspector	Telesforo Castro, Facility Inspector
Site profile	43 classrooms and 11 restrooms reported; sunny weather
Follow-up recorded	None recorded (Follow Up marked NA)

Ratings recorded: 30 deficient (D) and no extreme (X) ratings across 53 areas.

Category Results

FIT Category	Score	Rank
A. Systems	100.00%	GOOD
B. Interior	75.47%	FAIR
C. Cleanliness	100.00%	GOOD
D. Electrical	79.25%	FAIR
E. Restrooms / Fountains	79.93%	FAIR
F. Safety	100.00%	GOOD
G. Structural	100.00%	GOOD
H. External	100.00%	GOOD

Priority Finding. Interior is the lowest-scoring category at 75.47%, with 13 deficient ratings in Portables Boys Restroom, Portables Staff All Gender Restroom, Portables Classroom P27, Portables Classroom P28, Classroom C101 and 8 other areas.

ALAMEDA COUNTY OFFICE OF EDUCATION

Category Totals and Ranking

FACILITY INSPECTION TOOL (FIT) OFFICE OF PUBLIC SCHOOL CONSTRUCTION
SCHOOL FACILITY CONDITIONS EVALUATION

Oakland Unified | Oakland Military Institute, College Preparatory Academy (01612590130617) | Inspected by Telesforo Castro

CATEGORY TOTALS AND RANKING (displayed to two decimal places)

TOTAL NUMBER OF AREAS EVALUATED	CATEGORY TOTALS	A. SYSTEMS			B. INTERIOR	C. CLEANLINESS		D. ELECTRICAL	E. RESTROOMS / FOUNTAINS		F. SAFETY		G. STRUCTURAL		H. EXTERNAL	
		GAS LEAKS	MECH/HVAC	SEWER	INTERIOR SURFACES	OVERALL CLEANLINESS	PEST/VERMIN INFESTATION	ELECTRICAL	RESTROOMS	SINKS/ FOUNTAINS	FIRE SAFETY	HAZARDOUS MATERIALS	STRUCTURAL DAMAGE	ROOFS	PLAYGROUND/ SCHOOL GROUNDS	WINDOWS/ DOORS/GATES/ FENCES
53	Number of "OK"s:	53	53	53	40	53	53	42	7	51	53	53	53	53	1	53
	Number of "D"s:	0	0	0	13	0	0	11	4	2	0	0	0	0	0	0
	Number of "X"s:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Number of N/As:	0	0	0	0	0	0	0	42	0	0	0	0	0	52	0
Percent of System in Good Repair Number of OKs / (Total Areas - NAs)		100.00%	100.00%	100.00%	75.47%	100.00%	100.00%	79.25%	63.64%	96.23%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Total Percent per Category (average of systems)*		**100.00%**			**75.47%**	**100.00%**		**79.25%**	**79.93%**		**100.00%**		**100.00%**		**100.00%**	
Rank GOOD = 90%-100% FAIR = 75%-89.99% POOR = 0%-74.99%		**GOOD**			**FAIR**	**GOOD**		**FAIR**	**FAIR**		**GOOD**		**GOOD**		**GOOD**	

OVERALL RATING Average percentage of the eight categories	91.83%	SCHOOL RATING**	GOOD

* An X rating sets its entire category to 0.00%. ** School rating applies the percentage ranges and descriptions below.

PERCENTAGE	RATING	DESCRIPTION
99%-100%	EXEMPLARY	The school meets most or all standards of good repair. Deficiencies noted, if any, are not significant and/or impact a very small area of the school.
90%-98.99%	GOOD	The school is maintained in good repair with a number of non-critical deficiencies noted. These deficiencies are isolated, and/or resulting from minor wear and tear, and/or in the process of being mitigated.
75%-89.99%	FAIR	The school is not in good repair. Some deficiencies noted are critical and/or widespread. Repairs and/or additional maintenance are necessary in several areas of the school site.
0%-74.99%	POOR	The school facilities are in poor condition. Deficiencies of various degrees have been noted throughout the site. Major repairs and maintenance are necessary throughout the campus.

ALAMEDA COUNTY OFFICE OF EDUCATION

Detailed Inspection Findings

The 26 areas below contain 30 deficient system ratings (D). A single system rating may cover more than one observed defect.

Building or Area	Ratings	Recorded Observations
Boys Restroom by MPR	**1 D**	One urinal not working.
Girls Restroom by MPR	**1 D**	One loose faucet.
Classroom 16	**1 D**	One loose faucet inside rm 16.
Portables Classroom P21 (ID 11)	**1 D**	Outlet missing cover plate.
Portables Boys Restroom	**1 D**	Stains on ceiling tile and one cracked tile.
Portables Staff All Gender Restroom	**1 D**	Stains on ceilling tile.
Portables Classroom P23	**1 D**	One outlet missing cover plate.
Portables Classroom P25	**1 D**	Two lights out.
Portables Classroom P26	**1 D**	Two lights out.
Portables Classroom P27	**1 D**	Wall paper ripped on side wall.
Portables Classroom P28	**1 D**	Pencil sharpener missing cover.
Classroom C101	**2 D**	One ceiling tile cracked and one outlet missing cover plate.
Classroom C103	**1 D**	Two lights out.
Classroom C201	**1 D**	Two lights out.
Classroom B102	**1 D**	Two lights out.
Classroom B104	**2 D**	Wallpaper ripped on side wall, portion of baseboard sepatating from wall and one light out.
Classroom B105	**1 D**	Baseboard portion missing on side wall.

ALAMEDA COUNTY OFFICE OF EDUCATION

Building or Area	Ratings	Recorded Observations
Boys Restroom by rm 105	**1 D**	One toilet not working/flushing.
Classroom B206	**2 D**	Stains on ceilling tiles and one cracked outlet plate.
Classroom B204	**1 D**	Stains on ceiling tiles.
Classroom B203	**2 D**	One cracked outlet plate and stains on ceiling tiles.
Classroom B202	**1 D**	Stains on ceiling tiles snd wall paper ripped on side wall.
Classroom B201	**1 D**	Stains on ceilling tiles and wallpaper ripped on 2 walls.
Girls Restroom by rm 12	**1 D**	One faucet not working.
Boys Restroom by rm12	**1 D**	One urinal not working.
Classroom 2	**1 D**	3 floor tiles chipped.

Key: OK = good repair; D = deficient; X = extreme deficiency; NA = not applicable.

ALAMEDA COUNTY OFFICE OF EDUCATION

Follow-Up and Report Notes

Recorded Follow-Up

Field	Recorded Information
Follow-up inspection	None recorded (Follow Up marked NA)
District representative	Ismael Robles
Representative title	Facilities Manager/Kitchen Manager
Representative email	irobles@omiacademy.org

Suggested Next Steps. Complete and document the repairs listed on page 3 and verify completion through a follow-up inspection. No follow-up inspection is recorded in the workbook.

Inspector Comments

The Contact tab records:

> **“This is a 6-12 school and is Ed Code 35292.6 compliant”**

Comments are reproduced as entered.

Inspection Scope

The other 27 areas have no D or X ratings.

The Science Lab Equipment (9-12) tab records equipment access as Yes for eye wash station, fire blankets, fire extinguisher, goggles, goggle sanitation supplies and shower station, and as No for gas jets and hood. Annual inspection is marked NA for every entry. This tab does not feed the FIT scores. Enrollment, site size, building size and building volume fields are blank.

How the Scores Are Calculated

Each system score is calculated as **OK / (53 evaluated areas - NA ratings)**. Category scores average their system percentages. An X in any system sets that category to zero. The overall score averages the eight category scores equally.

There are 795 area-system entries: 671 OK, 30 D, 0 X and 94 NA. These are ratings across 15 systems, not counts of unique rooms or individual defects.

Source References

Workbook: Oakland Unified | Oakland Military Institute, College Preparatory Academy (01612590130617).xlsx. Contact: D4:D26, F5, F23. Inspection: C4:T56. Results: A4:R20. Science Lab Equipment (9-12): C4:E12.

Coversheet

BP 5144.1 - Honor Board and Military-Standards Dismissal

Section:	IV. Items
Item:	G. BP 5144.1 - Honor Board and Military-Standards Dismissal
Purpose:	Vote
Submitted by:	CMSgt (CA) Thomas James
Related Material:	BP5144.1 Honor Board and Military-Standards Dismissal (1).pdf

BACKGROUND:

As part of the steps Oakland Military Institute (“OMI”) is taking in response to the exit data identified in the Oakland Unified School District’s October 6, 2026 notice under Education Code sections 47607(e) and 47604.32(a), is OMI’s proposed corrective action plan under section 47607(e) that requires updating our dismissal and expulsion due process procedures.

RECOMMENDATION:

It is the recommendation of the superintendent and staff that the board adopt the new honor board and military standards dismissal policy.

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BP 5144.1

Original Adopted Date:

Last Revised Date:

BOARD POLICY: CADET HONOR BOARD, MILITARY-STANDARDS DISMISSAL, AND RELATED WITHDRAWALS

I. PURPOSE AND SCOPE

This policy governs the Cadet Honor Board, dismissal of a cadet under Education Code section 47605(e)(5) for failure to maintain the minimum standards of conduct required by the California Military Department, and withdrawals that occur after OMI has informed a cadet or family that an Honor Board referral, dismissal, expulsion, or other action affecting continued enrollment is possible.

This policy supplements, and does not replace, the cadet suspension and expulsion procedures in OMI's charter. It forms part of OMI's cadet suspension and expulsion policy.

Relationship to the charter. OMI applies this policy consistent with the charter in effect at the time of the action. If this policy conflicts with the charter then in effect, the charter controls.

II. PRINCIPLES

The Cadet Honor Board exists to correct conduct and support the cadet, not to remove students from OMI. Its primary outcome is a written Corrective Action Contract under which the cadet remains at OMI.

No OMI employee shall ask, encourage, or suggest that a cadet or family withdraw from OMI or transfer to another school for any reason, including as an alternative to an Honor Board, disciplinary, or other process. This rule does not restrict OMI from carrying out the suspension, expulsion, and involuntary removal procedures in its charter and this policy.

No cadet shall be disciplined, dismissed, or otherwise involuntarily removed for any reason related to or arising out of academic performance or achievement or deficiency, test scores, grades or coursework, or the quality of the cadet's academic work.

No cadet shall be involuntarily removed from OMI, that is, disenrolled, dismissed, transferred, or terminated, for any reason except through the procedures in OMI's charter and this policy.

III. DEFINITIONS

Commandant means the Commandant of Cadets or the Commandant's designee.

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Superintendent means the Superintendent of OMI.

Parent means the cadet's parent or guardian and, where applicable, the cadet's educational rights holder.

Required recipients means the parent and, for a foster child or youth, the foster child's educational rights holder, attorney, and county social worker, and, for an Indian child as defined in Welfare and Institutions Code section 224.1, the Indian child's tribal social worker and, if applicable, county social worker.

Military-standards dismissal means dismissal of a cadet from OMI under Education Code section 47605(e)(5) and Section VI of this policy.

Schoolday means a day on which OMI is in session for instruction.

Enrollment-related notice means written or oral notice to a cadet or parent that an Honor Board referral, a military-standards dismissal, an expulsion recommendation, or other action that may affect the cadet's continued enrollment is being considered.

IV. CADET HONOR BOARD

Referral. A cadet who engages in repeated violations of OMI's behavioral expectations, as described in the Cadet/Parent Handbook, may be required to attend a meeting with staff and the cadet's parent and subsequently a Cadet Honor Board.

Notice. Before the Honor Board meets, OMI shall give the cadet and the parent written notice of the specific conduct at issue and the handbook rule involved, the date and time of the meeting, the possible outcomes, the opportunity to respond, and the availability of language and accessibility support. The notice shall also state that the cadet has the right to remain enrolled throughout the process and to respond to the concerns raised, and shall describe the process that applies. The notice shall be accompanied by the All Students Belong at OMI flyer. OMI shall record the date, method, and recipient of delivery.

Review of supports. At each Honor Board, OMI shall review and document the supports and interventions provided to the cadet, including Tier 1, Tier 2, and Tier 3 supports, the dates, the responsible staff, the cadet's response, and remaining needs.

Dispositions. The Honor Board may make only one of two dispositions: (1) a written Corrective Action Contract with measurable goals, a staff monitor, scheduled reviews, and coordinated supports, under which the cadet remains at OMI; or (2) a referral to the Commandant for further review under Section V. The Honor Board may not expel or dismiss a cadet from OMI and may not terminate a cadet's California Cadet Corps membership.

Written disposition and appeal. The Honor Board shall provide its disposition in writing with instructions for appeal. The cadet or parent may appeal the disposition in writing to the

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Superintendent within ten (10) business days after documented delivery of the written disposition.

V. COMMANDANT REVIEW AND CHOICE OF PROCEDURE

The Commandant shall review each Honor Board referral and the underlying record. A referral to the Commandant is not a dismissal or expulsion determination.

After review, the Commandant shall do one of the following, in writing: (a) return the matter to the Honor Board or to a corrective plan; (b) initiate expulsion procedures under the charter, if the record supports an enumerated suspension or expulsion offense; or (c) initiate a military-standards dismissal under Section VI, if the record supports a ground under Section VI.A.

Any written initiation under (b) or (c) shall identify the specific offense or military standard at issue, the facts supporting it, and the supports and interventions provided, and shall explain why the facts justify formal proceedings.

A matter need not first go to the Honor Board where the charter requires or permits immediate action, including the mandatory expulsion offenses listed in the charter.

VI. MILITARY-STANDARDS DISMISSAL

A. Grounds. Education Code section 47605(e)(5) authorizes OMI, as a charter school in operation as of July 1, 2019 that operates in partnership with the California National Guard, to dismiss a cadet for failing to maintain the minimum standards of conduct required by the California Military Department. Those standards are set out in Appendix F to OMI's 2027–2032 charter renewal petition and are reproduced in Attachment A. Conduct addressed through military-standards dismissal includes continued failure to comply with the military requirements of OMI, such as refusal to wear the proper uniform, refusal to comply with established grooming standards, refusal to display military courtesy, or refusal to participate in the requirements for promotion from "candidate" to cadet after OMI has provided make-up opportunities during the first semester of enrollment.

B. Academic standards excluded. Notwithstanding any Military Department standard, no cadet shall be disciplined or subject to military-standards dismissal for any reason related to or arising out of academic performance or achievement or deficiency, test scores, or the quality of the cadet's academic work.

C. Required supports. Before recommending a military-standards dismissal, the Discipline Board shall confirm that the interventions and supports documented by the cadet's grade-level Academic Support Group and prescribed and documented by the Cadet Honor Board have been provided and verified, and that all remediation and intervention supports have been exhausted as

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prescribed by the Cadet Honor Board and detailed by the Grade Level Academic Support Group, Wellness, Cadet Services, and the IEP team where a manifestation determination is required.

D. Notice of intent to dismiss. OMI shall provide the required recipients written notice of intent to dismiss the cadet at least ten (10) calendar days before the Discipline Board hearing. The notice shall be in the native language of the cadet or the parent or, for a homeless or foster child or youth, in the native language of the educational rights holder. The notice shall state: the specific ground under Section VI.A and the Military Department standard involved; the facts supporting it; the supports and interventions provided; the date, time, and place of the hearing; the rights at the hearing listed in Section VI.F; the right to remain enrolled until OMI issues a final decision; and the right to appeal. No dismissal shall take effect until the hearing, decision, and any appeal under this Section are complete, and in no event less than five (5) schooldays after the notice is provided.

E. Hearing. OMI shall schedule a Discipline Board hearing for every proposed military-standards dismissal. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Commandant determines that the cadet has committed a dismissable offense. The hearing shall be held in closed session unless the cadet requests a public hearing in writing at least three (3) days before the hearing. If neither the cadet nor the parent appears after notice has been provided under Section VI.D, the Discipline Board may proceed with the hearing and shall note in the record the notice provided and the failure to appear.

F. Discipline Board and hearing rights. The Discipline Board consists of at least three (3) neutral and impartial certificated members who are neither a teacher of the cadet nor a member of the OMI Governing Board, presided over by a designated neutral hearing chairperson. No member may have participated in the Honor Board proceeding, the Commandant's review, or the decision to initiate the dismissal. At the hearing the cadet may appear in person; be represented by legal counsel or a non-attorney advocate; inspect and obtain copies of all documents to be used at the hearing; confront and question all witnesses who testify; question all evidence presented; present oral and documentary evidence, including witnesses; and request an interpreter. The witness protections in the charter apply.

G. Evidence and recommendation. A record of the hearing shall be made. Technical rules of evidence do not apply, but evidence may be admitted only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation to dismiss must be supported by substantial evidence that the cadet failed to maintain a Military Department standard under Section VI.A and that the requirements of Section VI.C were met, and no recommendation to dismiss shall be based solely on hearsay. The Discipline Board shall issue written findings of fact and a written recommendation to the Superintendent.

H. Decision. The Superintendent shall issue a decision within ten (10) school days after the hearing concludes and shall send the required recipients written notice of the decision, including the Discipline Board's findings, the specific ground, the effective date of any dismissal, the right

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to appeal, and the appeal deadline. If the Discipline Board does not recommend dismissal, or the Superintendent does not order it, the cadet continues in the cadet's educational program.

I. Enrollment during proceedings. A cadet facing a proposed military-standards dismissal remains enrolled and continues to attend OMI until OMI issues a final decision. Conduct addressed through military-standards dismissal is not a ground for suspension, and a cadet shall not be suspended or excluded from instruction pending a dismissal hearing on that basis. For purposes of this Section, OMI issues a final decision when the time to appeal the Superintendent's decision under Section VI.J expires without a timely appeal or, if a timely appeal is filed, when the Governing Board decides the appeal.

J. Appeal. The cadet or parent may appeal the Superintendent's dismissal decision in writing to the Superintendent within ten (10) school days of the decision. The appeal will be heard at the next scheduled meeting of the OMI Governing Board. The Governing Board's review is limited to whether OMI acted without or in excess of its jurisdiction, whether there was a fair hearing, whether there was a prejudicial abuse of discretion in the hearing, and whether there is relevant and material evidence that, in the exercise of reasonable diligence, could not have been produced, or was improperly excluded, at the hearing. The Governing Board's decision is final.

K. After a dismissal. A dismissed cadet shall be disenrolled only after completion of these procedures. OMI shall promptly provide the family with the records needed for enrollment elsewhere and information about available public school options, and shall notify the superintendent of the school district of the cadet's last known address as required by Education Code section 47605(e)(3).

L. Cadets with disabilities. The charter's procedures for cadets with disabilities apply to a proposed military-standards dismissal, including notice to the SELPA and a manifestation determination within ten (10) school days of any decision to change the cadet's placement. If the conduct is determined to be a manifestation of the cadet's disability, the IEP or Section 504 team shall proceed as the charter provides, including returning the cadet to the placement from which the cadet was removed unless the parent and OMI agree to a change of placement.

VII. CALIFORNIA CADET CORPS MEMBERSHIP

Action on a cadet's California Cadet Corps rank or membership under Military and Veterans Code section 507 is separate from OMI enrollment. A California Cadet Corps membership action does not by itself dismiss a cadet from OMI. Any proposed military-standards dismissal requires separate notice and the procedures in Section VI. When California Cadet Corps action is under consideration, OMI shall inform the family in writing that the action concerns Cadet Corps membership and is not a disenrollment from OMI.

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VIII. WITHDRAWALS AFTER ENROLLMENT-RELATED NOTICE

Voluntary withdrawal initiated by a parent is not an involuntary removal. OMI shall not delay any family's transfer.

When a parent seeks to withdraw a cadet who has received an enrollment-related notice, including before any formal referral or proceeding has begun, or within sixty (60) days after an Honor Board referral or other enrollment-related notice, OMI shall, before the withdrawal is finalized: (1) give the parent written notice, if not already given, that the cadet has the right to remain enrolled throughout the process and to challenge the charges, and of the process that applies, together with the All Students Belong at OMI flyer; (2) offer an exit conversation with an administrator; (3) record the reason for withdrawal using standard categories; and (4) have the Superintendent or designee review the withdrawal and confirm that supports were offered.

IX. RECORDS AND REPORTING

OMI shall keep a service log recording the date, method, recipient, and language of every notice under this policy, and an indexed record of each Honor Board, Commandant review, and dismissal proceeding. These records shall be made available to the Oakland Unified School District upon request. The Superintendent shall report annually to the Governing Board on Honor Board referrals and dispositions, military-standards dismissals, and withdrawals logged under Section VIII.

X. EFFECTIVE DATE AND COMMUNICATION

This policy takes effect upon adoption by the Governing Board and applies to referrals and proceedings initiated on or after that date.

OMI shall provide this policy to staff with disciplinary responsibilities and train them on it, include it in or with the Cadet/Parent Handbook, and provide it to each family whose cadet is referred to the Honor Board or receives an enrollment-related notice. OMI shall conform the Cadet/Parent Handbook to this policy.

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ATTACHMENT A. CALIFORNIA MILITARY DEPARTMENT CADET STANDARDS OF CONDUCT

The following minimum standards of conduct are prescribed by the California Military Department for purposes of Education Code section 47605(e)(5). Under Section VI.B of this policy, standard 2.a.2 (academic studies) is not a basis for discipline or military-standards dismissal at OMI.

2. Each Cadet shall:

a. Be a model citizen

1) Cadets shall not commit any offense that may result in an expulsion or removal from the school the Cadet attends (For traditional public schools, offenses that may result in expulsion are codified in Education Code Section 48900 et sec. For public charter schools, offenses that may result in expulsion are listed or referenced in the charter school's operative charter.).

2) Cadets shall not be deficient in their academic studies as defined by their school (For purposes of this Policy, "deficient in academic studies" is to be defined by the governing board of each school with a program affiliated with the CACC.).

3) Cadets shall not take any action that may bring dishonor or disgrace to the school, the California Cadet Corps, the California Military Department, the State of California, or the United States of America.

4) Cadets shall not participate in political rallies, protests, or otherwise publicly display support or lack of support for an elected official or political party while wearing any article of the California Cadet Corps uniform.

b. Be a leader of character

1) Cadets shall not violate the Cadet Honor Code.

2) Cadets shall not commit hazing, bullying, or harassment including cyberbullying, sexual harassment, and the use of a cadet's position or authority to inappropriately coerce other cadets.

3) Cadets shall not be involved in unlawful or anti-social acts including, but not limited to, participation in gang or hate group activity that negatively reflects on the school, the California Cadet Corps, the California Military Department, the State of California, or the United States of America.

4) Cadets shall not commit sexual misconduct including, but not limited to, lewd/lascivious actions or solicitation of a sexual nature toward another person. This includes capturing, possessing or displaying indecent images of another person by any means.

c. Be healthy and prepared for the demands of college / public service career

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1) Cadets shall not possess, use, or distribute illicit narcotics, drug paraphernalia, or alcohol.

2) Cadets shall meet healthy fitness standards, demonstrate improvement until they do, or demonstrate habitual and significant training towards these standards.

d. Participate honorably in the military aspects of the Cadet program

1) Cadets shall not refuse to wear the uniform or comply with established grooming standards.

2) Cadets shall not refuse to display customs and courtesies established by the Military Department.

3) Cadets shall not refuse to obey valid orders issued from Commandants, Principals, and duly-appointed adult military / CACC members or civilian school personnel.

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Coversheet

AB 2519 - CalSTRS Membership Position Review

Section: IV. Items
Item: H. AB 2519 - CalSTRS Membership Position Review
Purpose: FYI
Submitted by: CMSgt (CA) Thomas James
Related Material: AB 2519 - CalSTRS Membership Position Review.pdf

BACKGROUND:

Establish an administrative process to identify OMI civilian positions subject to California State Teachers' Retirement System (CalSTRS) membership and prepare the required governing board resolution pursuant to Assembly Bill (AB) 2519 (Chapter 947, Statutes of 2026) and Education Code section 22156.07. 2. Background.

Effective 1 July 2027, Education Code section 22156.07 recognizes qualifying charter school positions that perform, direct, coordinate, supervise, or administer functions specified in section 44065. For positions requiring board designation, the charter school governing body must adopt a resolution at a public meeting identifying each position and its corresponding statutory function(s). Positions already covered by a certificated bargaining unit are addressed separately under section 22156.07(a)(2).

RECOMMENDATION:

It is the recommendation of the superintendent and staff that the board approve the CALSTRS membership position review.

OAKLAND MILITARY INSTITUTE
COLLEGE PREPARATORY ACADEMY
3877 Lusk Street | Oakland, CA 94608 | 510 594 3900 | oakmil.org
Superintendent: Dr. M.E. Streshly
Board Chairman: Honorable Edmund G. Brown

SUBJECT: Assembly Bill 2519 – CalSTRS Membership Position Review and Governing Board Resolution

1. Purpose. Establish an administrative process to identify OMI civilian positions subject to California State Teachers' Retirement System (CalSTRS) membership and prepare the required governing board resolution pursuant to Assembly Bill (AB) 2519 (Chapter 947, Statutes of 2026) and Education Code section 22156.07.

2. Background. Effective 1 July 2027, Education Code section 22156.07 recognizes qualifying charter school positions that perform, direct, coordinate, supervise, or administer functions specified in section 44065. For positions requiring board designation, the charter school governing body must adopt a resolution at a public meeting identifying each position and its corresponding statutory function(s). Positions already covered by a certificated bargaining unit are addressed separately under section 22156.07(a)(2).

3. Position Review. Human Resources shall evaluate the following OMI civilian classifications identified on the preliminary worksheet: Superintendent; Executive Director of Administrative Services; Chief Academic Officer; Teacher; Dean of Climate & Safety; Tutor; and Director of Teaching & Learning. Inclusion on the worksheet does not, by itself, establish CalSTRS eligibility.

4. Required Actions.

a. Review current position descriptions and actual functions against Education Code section 44065; document whether each position performs or directs, coordinates, supervises, or administers the qualifying functions.

b. Confirm whether each position requires a qualifying credential, license, permit, or certificate, or would require one in an equivalent public school district or county office of education position.

c. Determine existing CalSTRS or CalPERS coverage, any applicable retirement election, and whether a position is included in a certificated or noncertificated bargaining unit. Coordinate determinations with CalSTRS and legal counsel before payroll changes.

d. Prepare a proposed board resolution and exhibit listing each qualifying position and the corresponding section 44065 function(s); present the resolution for action at a public meeting before 1 July 2027.

e. Coordinate with payroll to implement validated membership and reporting changes effective 1 July 2027, subject to applicable statutory eligibility and elections.

5. Scope. This review is limited to OMI civilian employee classifications. California Military Department State Active Duty personnel assigned to OMI shall not be included solely by virtue of their military assignments.

6. Recommendation. Human Resources should complete the position matrix and obtain legal review prior to submission of the proposed resolution for consideration at an upcoming OMI Board of Directors meeting. A separate board memorandum is an administrative support document, not a substitute for the required resolution.

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Carlos Rodriguez
Business Services Manager
Oakland Military Institute
College Preparatory Academy

Coversheet

Cadet Commander Report

Section: V. Cadet Commander's Report
Item: A. Cadet Commander Report
Purpose:
Submitted by:
Related Material: Board Meeting Update – 19 NOV 2026 (1).pdf

Participation & Promotions

Overall cadets participating

2025

68.27%

25'26 Total Events: 16

2026

73.38%

26'27 Total Events: 14

August-November 2026 promotions

Total promotions

187

Class of 2027 Seniors at C/SGT+

51 / 51

Class of 2028 Juniors at C/SGT+

27 / 64

FALL FESTIVAL

Money Raised, 2025 vs 2026

SOURCE	2025	2026
Companies	$2,745	$3,209
Sports	$942	$889
Clubs	$453	$790
CACC	–	$617
Other	N/A	$1,125
Total	$4,140	$6,630

2026 TOTAL

$6,630

up from $4,140 in 2025

LIAISONS UPDATE

OMI Cares & Cadet Tutors

OMI Cares

Events	Hours this semester	Total cadets
9	606	200

Cadet Tutors

Current Tutors	Hours this semester	Cadets served
7	60	50

Tutoring goal

Cadet tutors support middle school cadets in any task, from math to English, building foundations like PEMDAS and Jane Shaffer. After homework, they move on to math worksheets to build proficiency, working alongside the adult tutors. We hope to grow the program into worksheets for every subject, with tutors inspiring younger cadets to tutor in high school and build an endless system of success.

CHARTER RENEWAL

161 Cadets Attended
79 Parents





Coversheet

Initial Public Hearing Slides

Section: VI. Superintendent's Update
Item: A. Initial Public Hearing Slides
Purpose:
Submitted by:
Related Material: initial public hearing slides 11_12.pptx.pdf

OAKLAND MILITARY INSTITUTE

The mission of the Oakland Military Institute College Preparatory Academy (OMI) is to prepare each of its cadets to qualify for, and succeed in, leading colleges and universities. OMI through a cadet-led experience, instills honor, integrity, and leadership.

OMI Has Earned It: The Case For A Clear 5 Year Charter Renewal

OMI is one of a kind.

No other school in the Bay Area offers our unique Cadet experience.

OMI has achieved exceptionally strong growth rates by the CORE Districts growth metric assigned by OUSD.

Extraordinary trajectory of academic improvement.

OMI surpassed most similar schools in math, literacy, & CCI

OMI invests in intensive structures and supports to excel at serving Oakland's most challenged teens.

"I chose... because I wanted to be the first one to graduation high school. Omi has a lot of opportunities and they can help you, the counselors work really well with you to see what path is good for you." Shastlyn CR (High School Cadet)

There is only one OMI.

An opportunity East Bay students would not otherwise have.

A state partnership, not a program

Founded by then Mayor of Oakland, Jerry Brown , in 2001 with the California Military Department, which assigns and pays about 20 active-duty cadre to OMI: a staffing resource no school budget could replicate.

Military academy structure, no tuition

Families elsewhere pay private military academies for this kind of structure. At OMI, any student can enroll, and on average, 91% of cadets are socioeconomically disadvantaged.

Experiences that build confidence

Every new cadet begins with a week at Cal Poly Maritime, in the dorms, at a camp planned and run by cadet leaders. From first aid to wilderness survival, cadets leave OMI certified, tested, and ready!

“Our family has been part of OMI since its beginnings in West Oakland, and we couldn't be happier to have found such a wonderful school.” — Alicia D. (Parent)

OMI: Who We Serve

- OMI serves twice the percentage of English learners as the state average.
- Over nine out of ten of its students are socioeconomically disadvantaged.
- New students entering OMI, on average, are over 80% below proficient, with approximately 60% scoring far below (Level 1) in the prior year.

Student Group	OMI	OUSD	CA
English Learners	**33.5%**	30.6%	16.2%
Socioeconomically Disadvantaged	**91.0%**	80.4%	63.1%
Students with Disabilities	**15.8%**	17.6%	14.8%
African American	**13.0%**	19.0%	4.8%
Asian	**9.6%**	8.6%	10.3%
Hispanic	**65.3%**	50.9%	56.0%
White	**1.4%**	10.6%	19.7%



Myth vs. Fact

A supportive academic structure, not a disciplinary school

MYTH
OMI is a military school for students with discipline problems.

FACT
OMI is a college preparatory public school of choice. Admission is open to all, with a public random drawing when oversubscribed, and is never conditioned on grades or behavior.



MYTH
Cadets are being trained for the military.

FACT
Cadets are being prepared for college. In the Class of 2026, of the 53 graduates, 26 accepted 4-year university offers, 18 chose 2-year college programs, and 6 enlisted with college tuition assistance due to our academy partnerships.



MYTH
Structure means punishment.

FACT
Structure means support. The military cadre serve as advisors and mentors (Teach, Advise, Counsel), adding caring adults at every grade level and performing as grade level team leaders who support all teachers. Zero expulsions in four years.

MYTH
Leadership is for a few top students.

FACT
Leadership is a daily practice for everyone: cadets hold real roles in their company, classroom, and headquarters, and senior cadets plan, teach, and mentor younger cadets. As early as 6th grade, cadets are tasked with complex leadership roles.



"To me, OMI is the best school I could have ever chosen for them." - Onelia S. (Parent)

Age Quod Agis

Do Well Whatever You Do - Focus On The Task At Hand

The motto cadets recite every day is the ethos of the school: attention to what matters, integrity in how it is done, and leadership that is practiced, not just taught.

1. **Do the task at hand, and do it right**
   Full attention is a practice in mindfulness and self-reliance and service as this is the path to self-actualization.

2. **Honor yourself**
   Honor and integrity are OMI's mission: cadets learn self-respect by keeping their word and owning their choices.

3. **Lead, don't just learn about leading**
   Cadets run the cadet command, plan schoolwide events, teach and mentor younger cadets, and report to the Board at every meeting.





363
real leadership roles for about 525 cadets

13%
Chronic Absenteeism in 2025-26, vs. 35% at similar Oakland schools

"At OMI I learned what it meant to be a fearless leader who steps up to challenges... After Princeton, I committed to serve humanity in any way possible". Nelly. R % 2021

The Power of Outdoor Adventure and Leadership Development



WE AIM TO BUILD

Perseverance · Passion · Improvisation · Communication · Empathy



OMI believes strong leaders balance technical expertise with communication, emotional intelligence, and decision-making in dynamic environments.

OMI CARES

1,005
community service hours recorded, 2025-2026 SY (HS 795.5 / MS 209.5)

76.5
hours of tutoring volunteered across the 2025-2026 SY

PROGRAMS

- Entrance Camp
- Summer Encampment
- BIVOUAC
- Wilderness
- Survival
- Regional Hikes
- State Competitions
- OMI Cares



From Investment to Impact: Programs That Move The Needle

- Skills based instruction for students with IEPs, Inclusive and Equity minded training for all staff
- High Impact Tutoring for all
- Community Engagement Initiative
- Governor’s Baccalaureate Diploma and College Advantage Dual Enrollment
- The power of outdoor adventure and leadership development

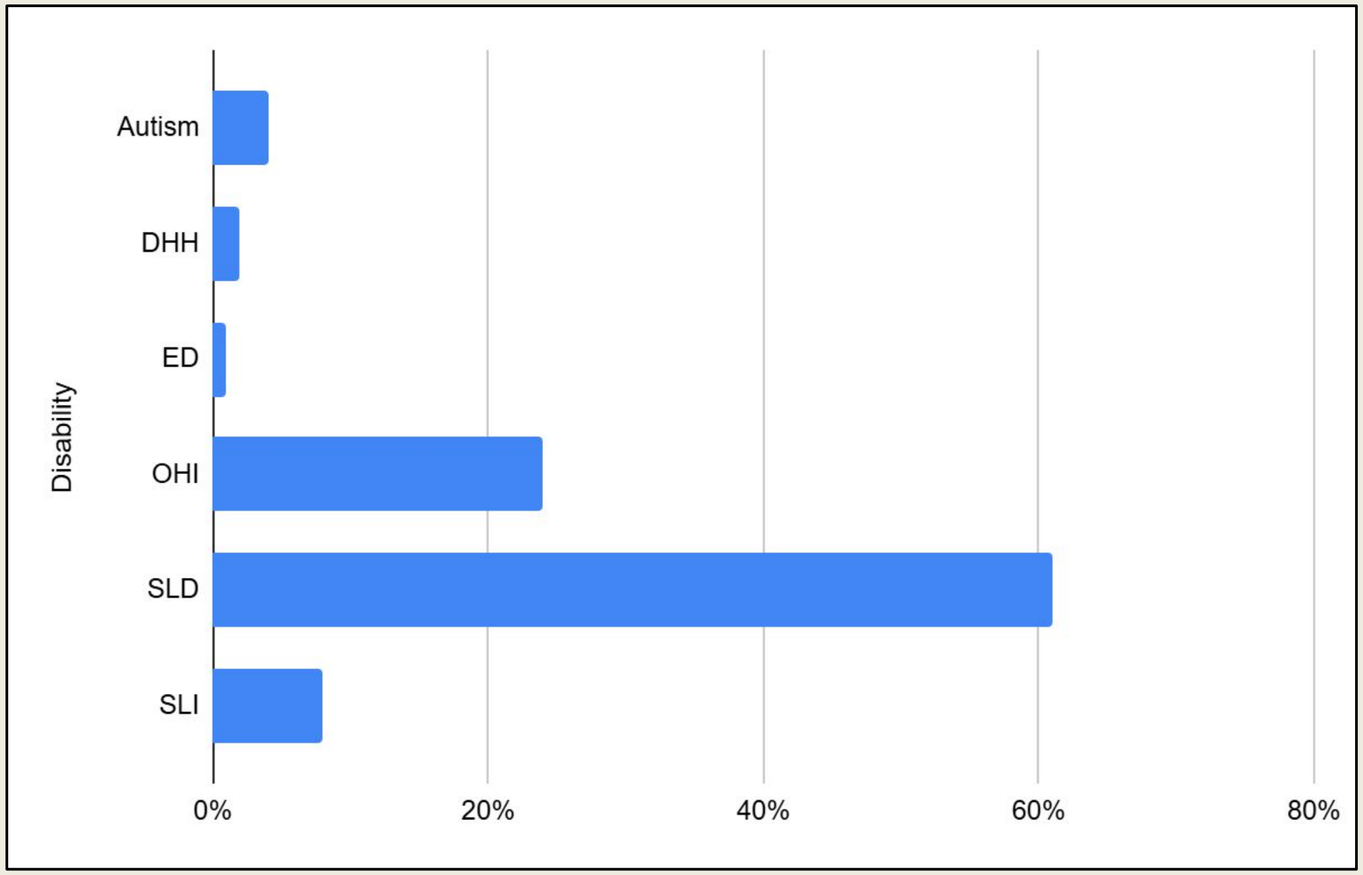




“Public school wasn't a great fit, I wasn't getting the grades I was capable of getting. My family and I chose OMI because we knew that I would thrive in a highly structured environment where I was pushed to succeed.” - S.B 11th Grade

Special Education Focused Expansion of Supports

4 Education Specialists
2 Para educators
1 Bilingual aide
2 Mental health staff
1 School Psychologist
1 Special Ed. Administrator
DHH teacher
Speech Therapist
87 SWD - 2026-2027



*From the 2024-2025 to the 2025-2026 school year, our CAASPP scores for both ELA and Math doubled.

"It gives us peace of mind knowing that our son always receives the individualized support he needs to succeed."
— Marisol G. (Parent)

Special Education Programs, cont.

- 99% of students spend more than 80% of their day in the General Education setting
- Education Specialists provide small group instruction as well as pushing into General Education classes for support
- Paraeducator support is provided based on student need (responsive)
- Counseling support is provided through 1:1 and group sessions



The School is excellent! It provides a welcoming, supportive, positive learning environment where students can learn, grow, and reach their full potential. The staff is wonderful, caring, professional, and dedicated to help every student succeed." Norma E.

High Impact Tutoring [HIT]

Theory of Action

OMI’s mission is college preparedness and eligibility for all. Math is a major barrier to college access and degree attainment. 80%+ students enter significantly below grade level. High frequency, individual support is the surest way to cure the learning loss and severe skill gaps with which cadets enter OMI.





OMI created a CEI team of parents, cadets, community partners and staff to attend CEI meetings & conferences for the purpose of building OMI's capacity to engage our community effectively.

- Grizzly Family Nights
- Increased attendance
- Grade level teams & Cadet hosts
- Cadet recognition in every convening
- Parent education topics
- Parent Led Committee
- Annual Parent empathy interviews
- Great food, music and fun themes

GOVERNOR'S BACCALAUREATE DIPLOMA

Goals:

- All OMI cadets given access to early college benefits
- Offer a defined program of dual enrollment grades 9-12 that would satisfy CALGETC requirements to transfer up to a full year of GE- breadth coursework to a 4-year university
- Save our families thousands of dollars of tuition and
- Increase exponentially the likelihood of degree attainment by reducing the time and cost of post secondary education

Where are we now?

★ Almost half the class of 2026 graduated with at least 1 semester of UC/CSU transferable credits.

★ 5 (10%) earned the Governor's Baccalaureate Diploma signifying 1 year of college completed.

Results That Follow Cadets to College

3,000+
dual enrollment credits earned in 2025–26, more than double pre-program levels

60%
of the Class of 2026 earned a college-credit diploma, up from 33% of the Class of 2025

96%
average pass rate in dual enrollment courses

91%
of dual enrollment students come from low-income families; 58% are first-generation college students





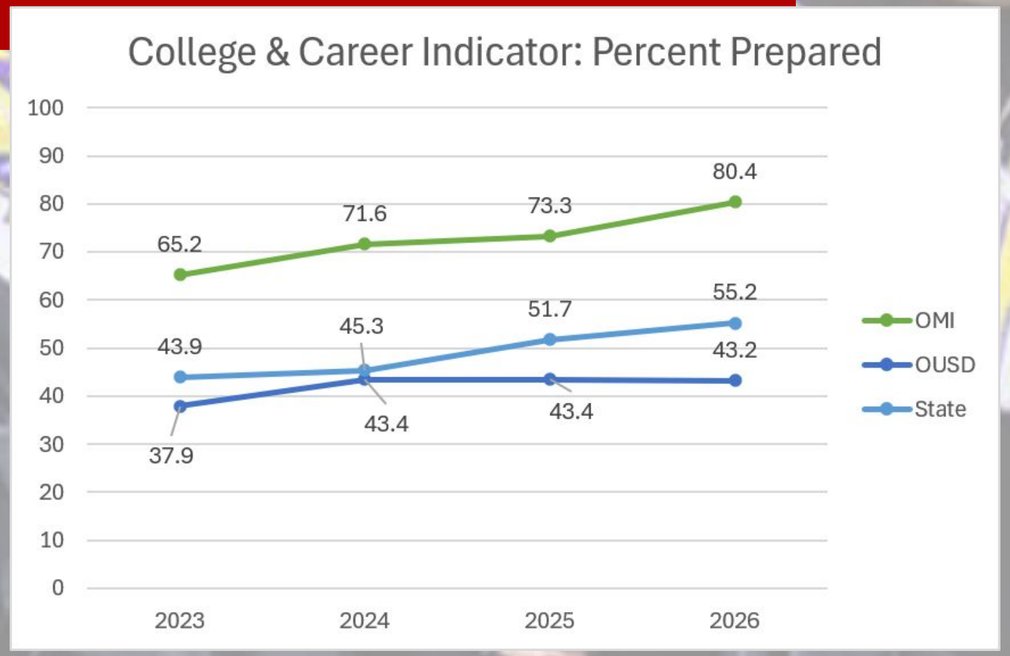


“I really appreciate how committed they are to keeping parents informed.” Lizbeth R. (Parent)

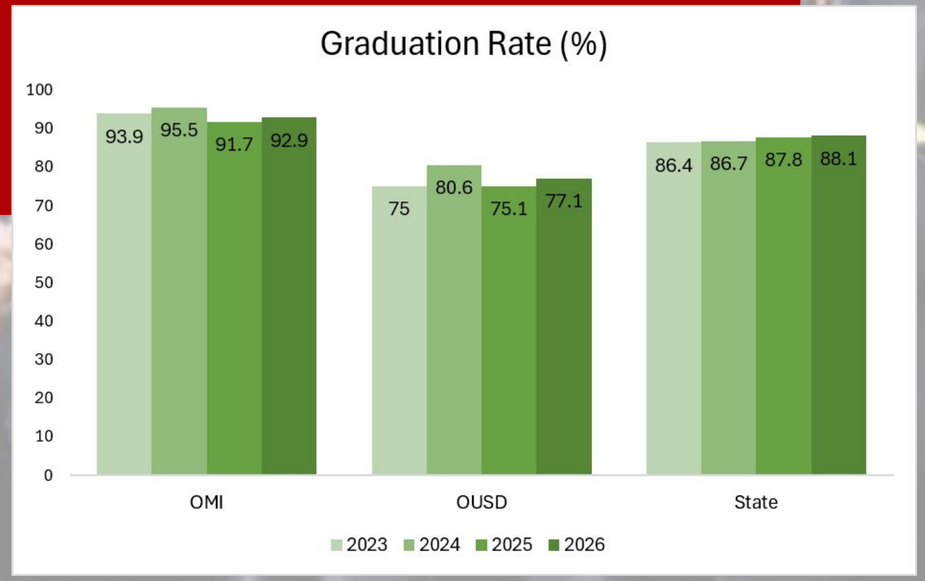
Preparing Students for College & Career

OMI prepares more of its students for college and career than the state or the district.

Over the last four years, the share of OMI students graduating college- and career-prepared has grown from 65% to 80%, consistently outpacing both state and district averages.



OMI also had a high graduation rate with over 90% of students graduating within 4 or 5 years.



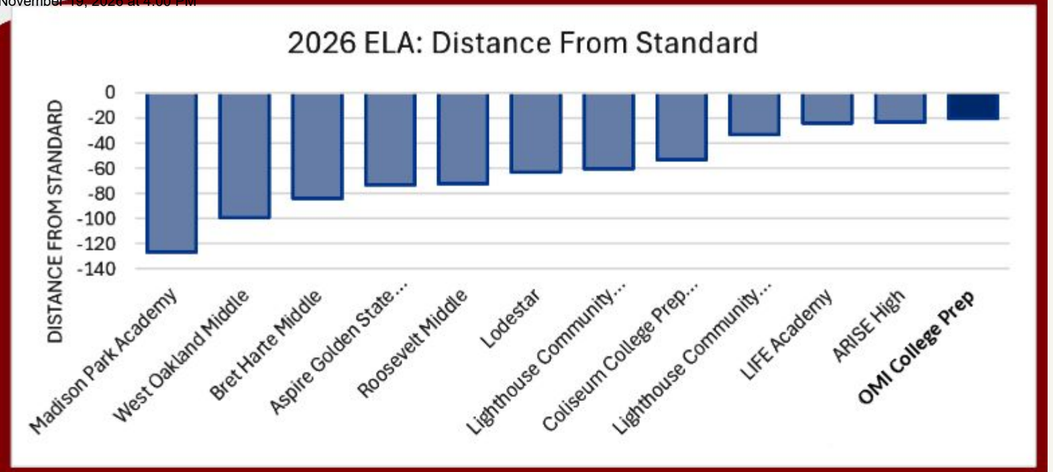
There's more leadership opportunities and for kids to teach each other stuff. It's not just the teachers instructing but it's other cadets teaching each other. Even if you're shy, they are going to make you feel more confident. Fernanda H. (11th grade)

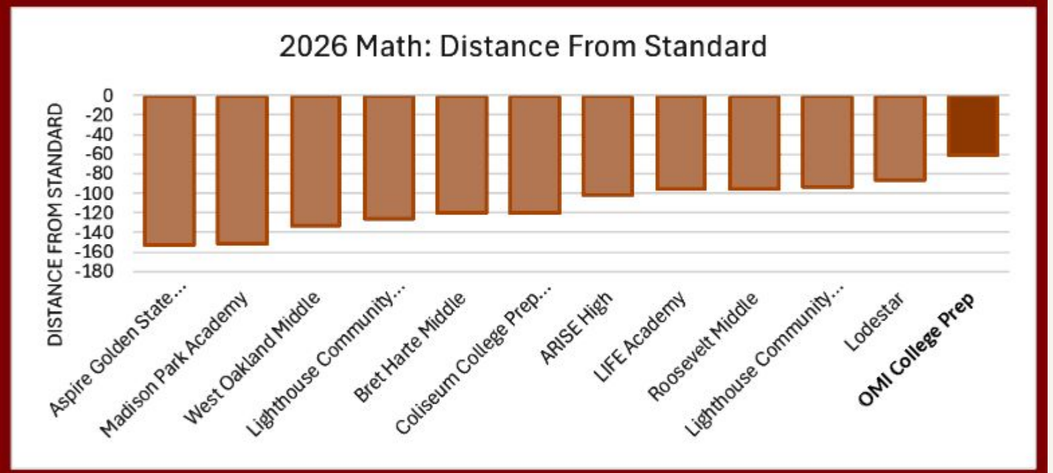
2026 Academic Comparisons to Local Schools

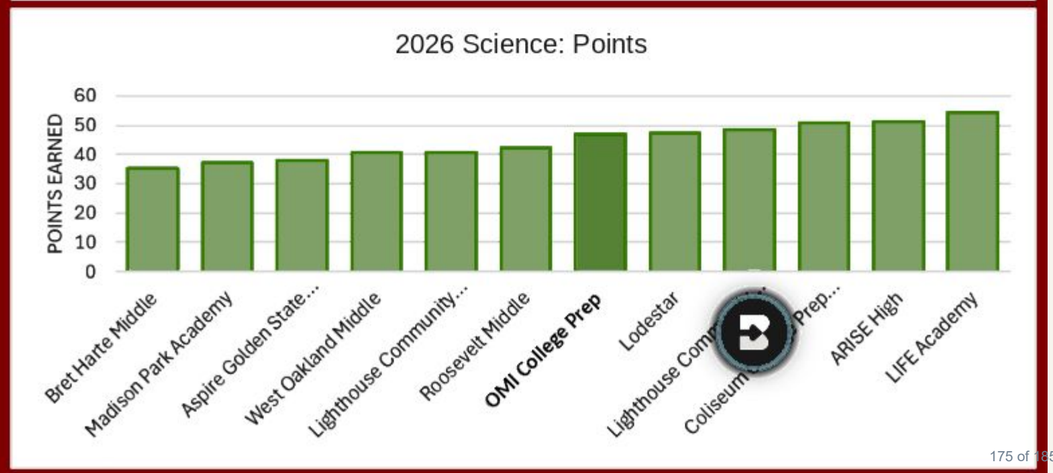
Compared to local similar schools in 2026, OMI surpassed:

- 11 of 11 schools in ELA
- 11 of 11 schools in Math
- 6 of 11 schools in Science

"My mom chose this school so she thought it would teach me discipline and independence and help me speak up for myself...You experience a lot that not other schools will give the opportunities." Suheiry (11th grade)







ELA & Math Comparison by Distance from Standard

In 2026, OMI performed better than all comparison local schools for nearly all student groups in ELA and Math.

	ENGLISH LANGUAGE ARTS							MATHEMATICS						
School	All	EL	LTEL	SED	SWD	AA	Hisp	All	EL	LTEL	SED	SWD	AA	Hisp
Oakland Military Institute	-20.1	-38.9	-56.6	-22.1	-86.6	-27.3	-27.1	-60.4	-73.7	-110.6	-65.2	-133.7	-95.9	-77.9
Bret Harte Middle	-84.0	-109.1	-133.3	-89.6	-125.4	-109.5	-100.4	-120.5	-131.4	-171.1	-126.9	-191.0	-161.7	-132.4
Roosevelt Middle	-72.6	-93.0	-125.8	-74.4	-131.1	-100.3	-105.5	-95.8	-117.5	-156.7	-98.3	-168.3	-135.4	-129.8
West Oakland Middle	-99.6	-120.1	-154.3	-102.1	-164.6	-107.5	-101.7	-132.8	-131.3	-163.7	-135.0	-206.3	-165.0	-121.1
Aspire Golden State College Prep	-73.0	-98.2	-120.2	-73.6	-138.1	-98.5	-67.0	-152.6	-166.2	-194.2	-152.6	-217.2	-183.6	-149.0
Coliseum College Prep Academy	-53.4	-69.6	-102.8	-54.4	-117.6	-83.5	-52.4	-119.9	-132.1	-166.0	-121.3	-180.8	-162.2	-114.7
LIFE Academy	-24.1	-44.3	-94.7	-25.5	-105.3		-23.7	-95.8	-113.1	-175.5	-96.9	-163.0		-94.6
Madison Park Academy 6-12	-126.6	-135.1	-169.1	-126.6	-172.5	-182.3	-115.7	-151.4	-163.0	-196.4	-151.4	-207.8	-198.7	-147.3
ARISE High	-23.2	-64.8	-74.6	-23.7	-93.1		-26.8	-101.9	-128.3	-130.9	-102.5	-137.2		-101.6
Lighthouse Community Charter High	-33.0	-94.2	-95.1	-37.5	-116.3		-35.9	-126.0	-163.5	-156.5	-131.8	-171.1		-130.7
Lighthouse Community Charter	-60.1	-75.2	-104.8	-61.1	-118.2	-99.4	-59.1	-93.1	-106.6	-133.8	-95.9	-157.8	-125.0	-92.4
Lodestar	-63.5	-78.5	-89.1	-65.0	-122.4	-60.8	-66.3	-86.0	-103.8	-143.5	-86.9	-151.2	-84.2	-88.8
Oakland Unified	-48.4	-95.8	-132.5	-73.9	-120.8	-89.0	-79.2	-72.4	-112.3	-177.9	-99.0	-145.9	-123.6	-104.9

ENGLISH LANGUAGE ARTS

Compared to local similar schools in 2026, OMI surpassed:

- 11 of 11 schools for All Students
- 11 of 11 schools for English Learners
- 11 of 11 schools for Long-Term English Learners
- 11 of 11 schools for Low Income students
- 11 of 11 schools for Students with Disabilities
- 8 of 8 schools for African American students
- 9 of 11 schools for Hispanic students

MATH

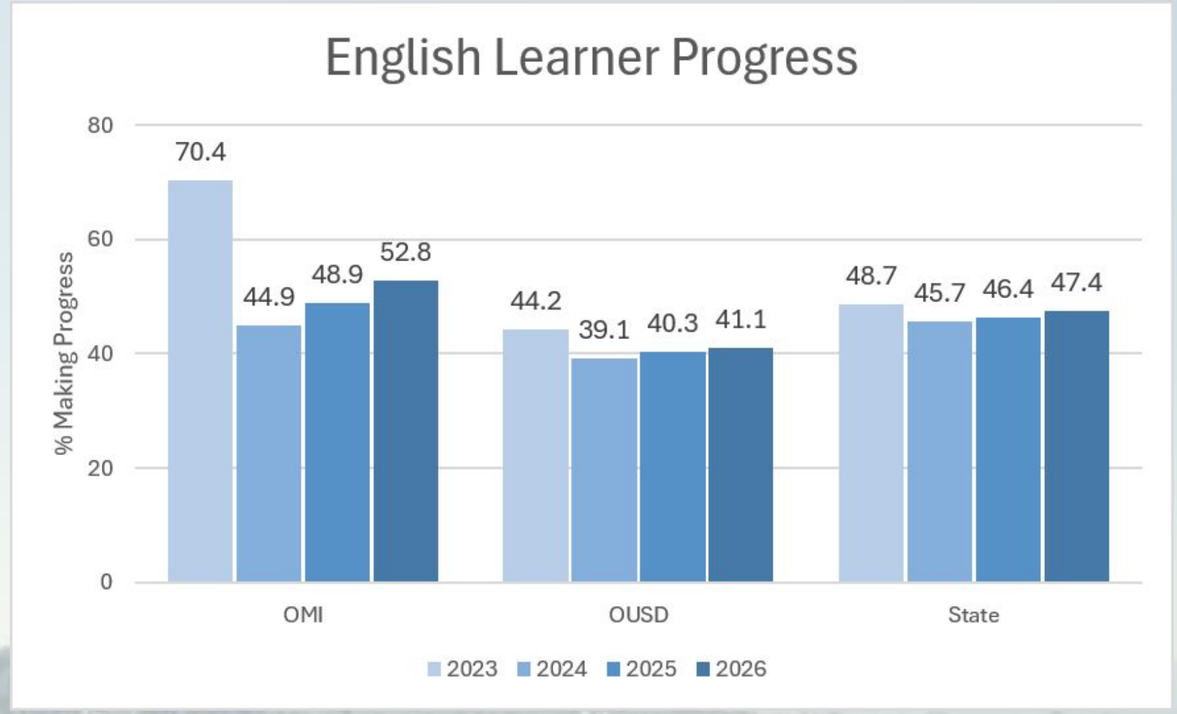
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- 11 of 11 schools for Low Income students
- 11 of 11 schools for Students with Disabilities
- 7 of 8 schools for African American students
- 11 of 11 schools for Hispanic students

"It gives us peace of mind knowing that our son always receives the individualized support he needs to succeed." Marisol G (parent)

English Learner Progress

OMI increased the percentage of LTELs making progress by 13+ percentage points from 2024 to 2025 to bring performance on par with the state.

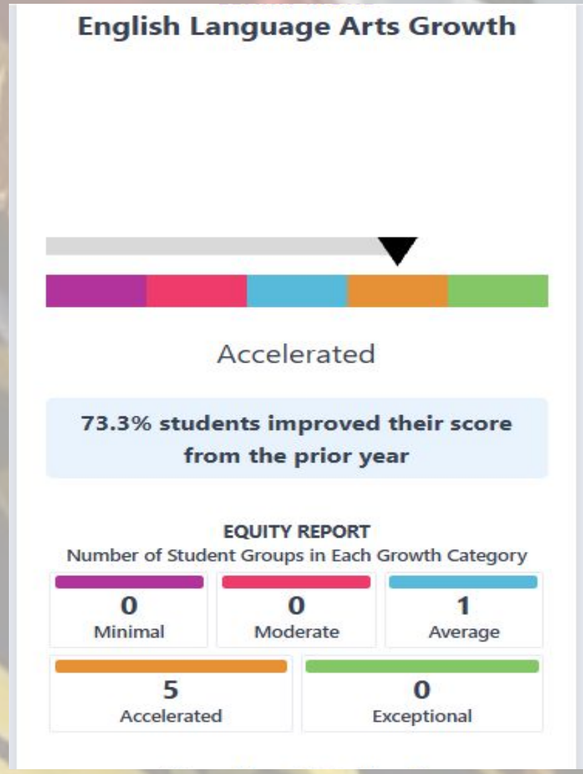


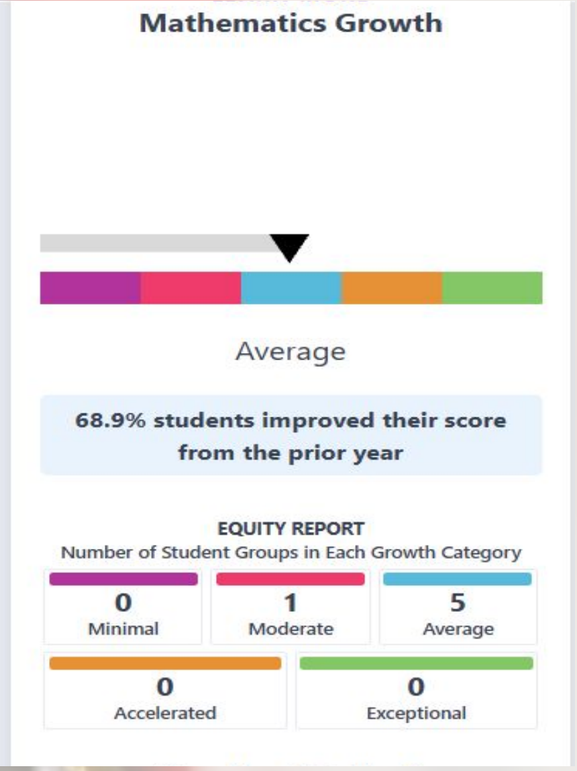
Long-Term English Learner Progress			
	2024	2025	2026
OMI	**35.9**	**49.5**	**60.0**
District	39.0	44.8	47.8
State	45.8	49.1	54.1

More of OMI's students make progress towards English language proficiency or maintain the highest level on the ELPAC than in OUSD or CA overall.

"My daughter arrived in this country at the age of 14, and in a very short time, with your support, she not only learned the language but has also maintained an impressive 4.0 GPA." — Monica A. (Parent)

Dashboard Growth





In 2025, OMI achieved an **Accelerated** growth score in ELA and an **Average** growth score in Math.

All but one student group achieved a growth score of Average or above in 2025, across both ELA and Math.

Only students with disabilities scored Moderate for growth in Math, with 74.3% improving their score from the prior year. In comparison, only 63.9% SWD improved for OUSD.

"The continuous encouragement she's received from her peers and teachers has helped her grow into a capable leader." - Kennisha J.C. (Parent)

Verified Data: Above Average Growth with CORE

CORE is a non-profit organization formed by several large California school districts. CORE's Data Collaborative allows OMI to compare its academic growth with similar schools in CA.

CORE DISTRICTS

Grade Level: MS



Grade Level: HS

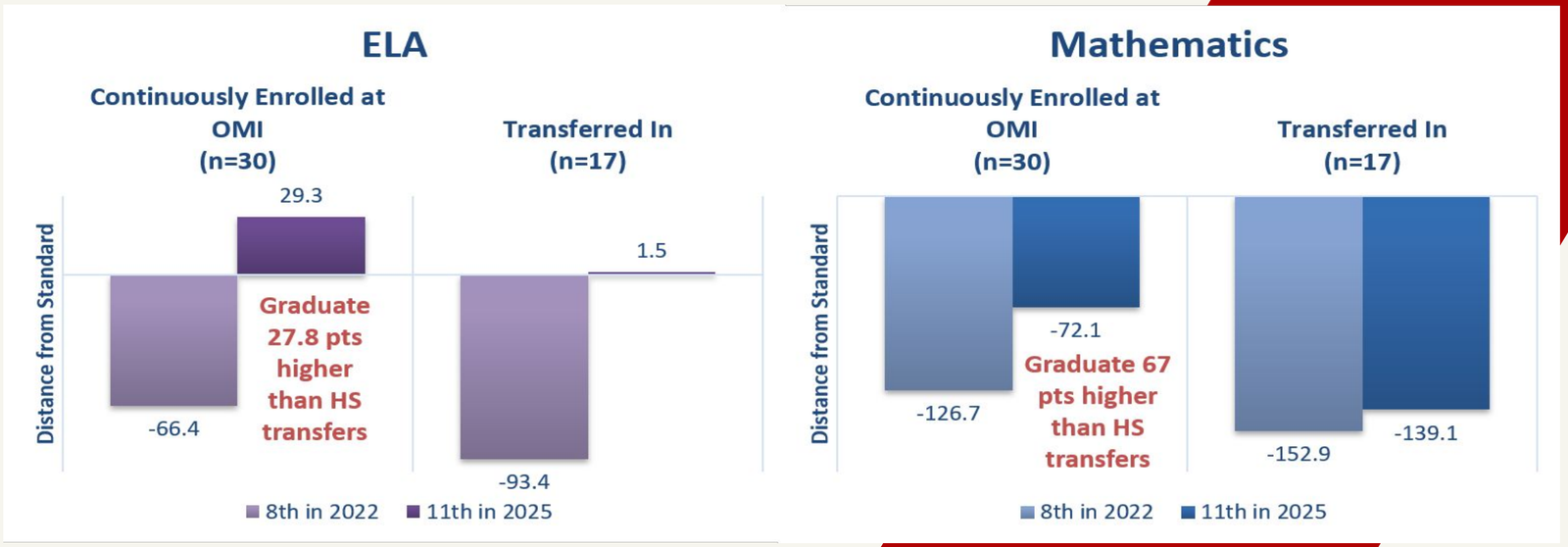


"I never imagined I would one day be earning my degree from an Ivy League institution". - Millie B. % 2022

The Seven-Year Advantage

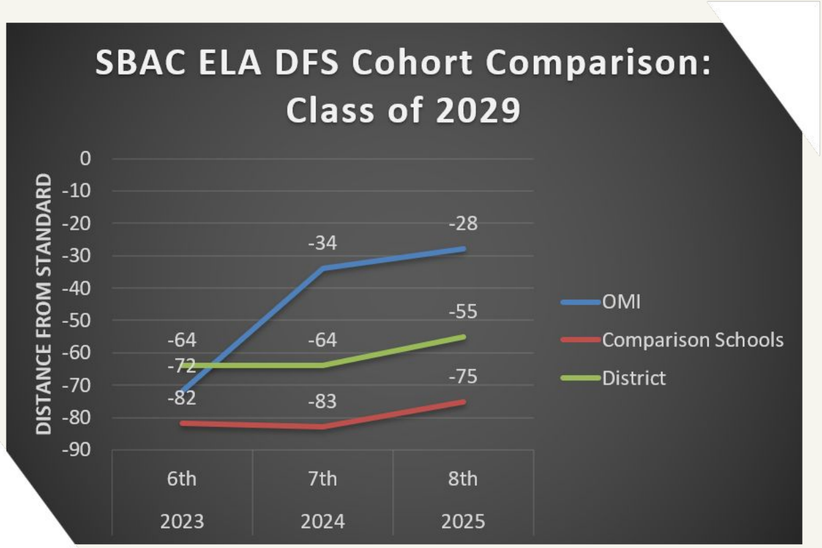
Students who stay continuously enrolled at OMI from MS to HS <u>significantly</u> outperform students who enter OMI in high school.

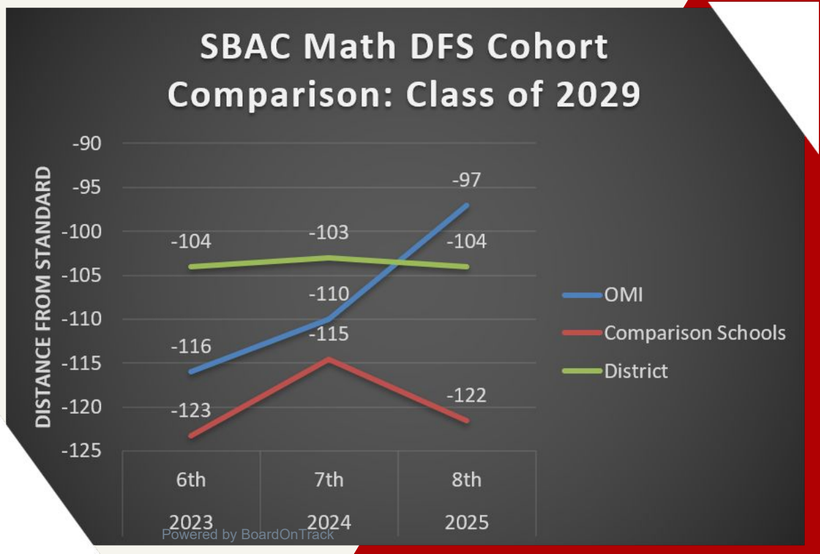
SMARTER BALANCED GROWTH FROM 8th to 11th: CLASS OF 2026



Students in OMI's middle school also show higher growth than comparison schools and the district.

- In ELA, OMI's 8th graders grew 44 DFS points since 6th grade; comparisons grew less than 10 points.
- In Math, OMI's 8th graders grew 19 points compared to 1-point growth at comparisons.

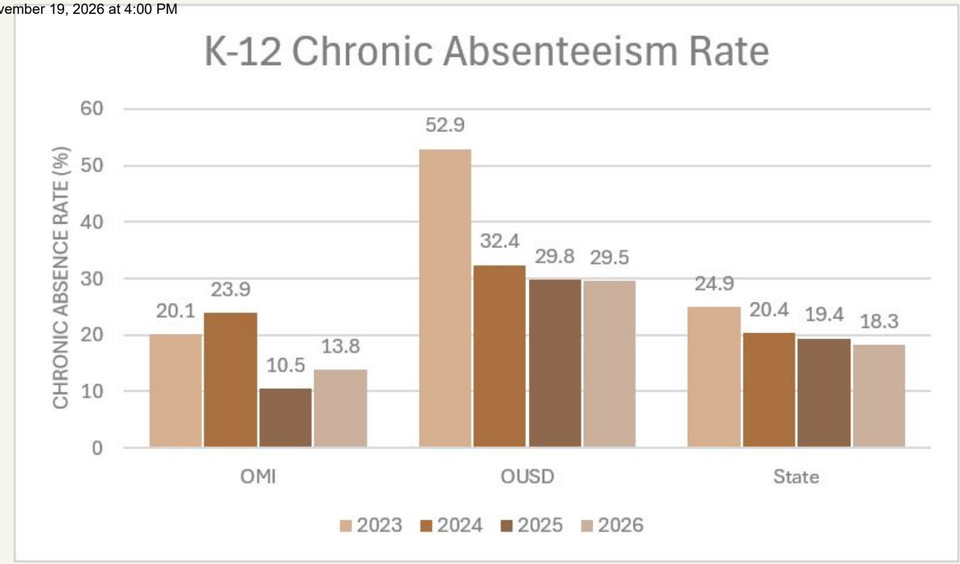




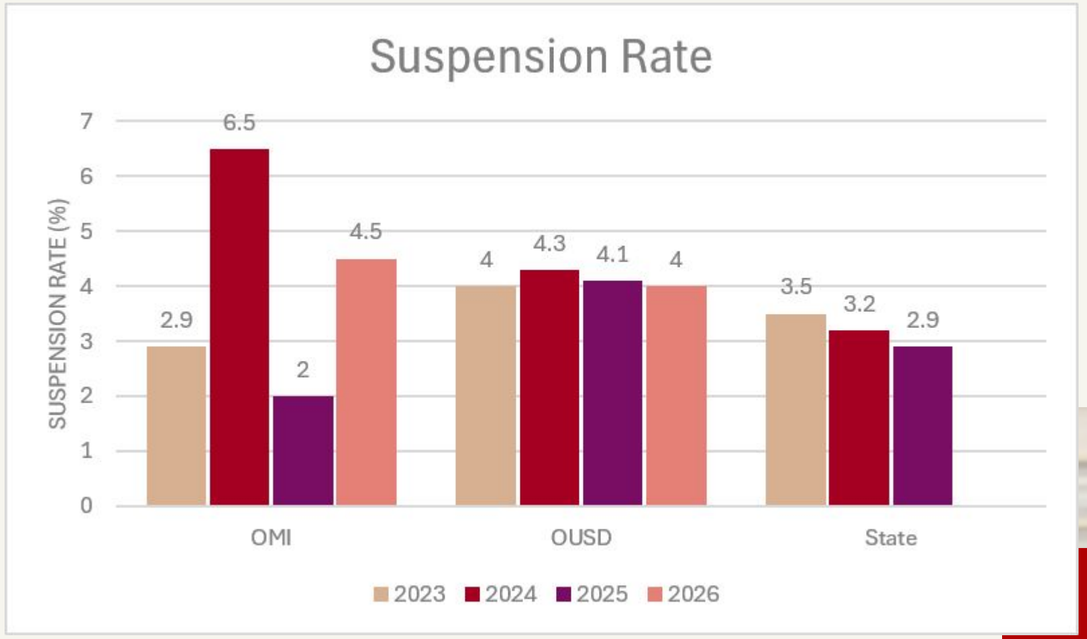
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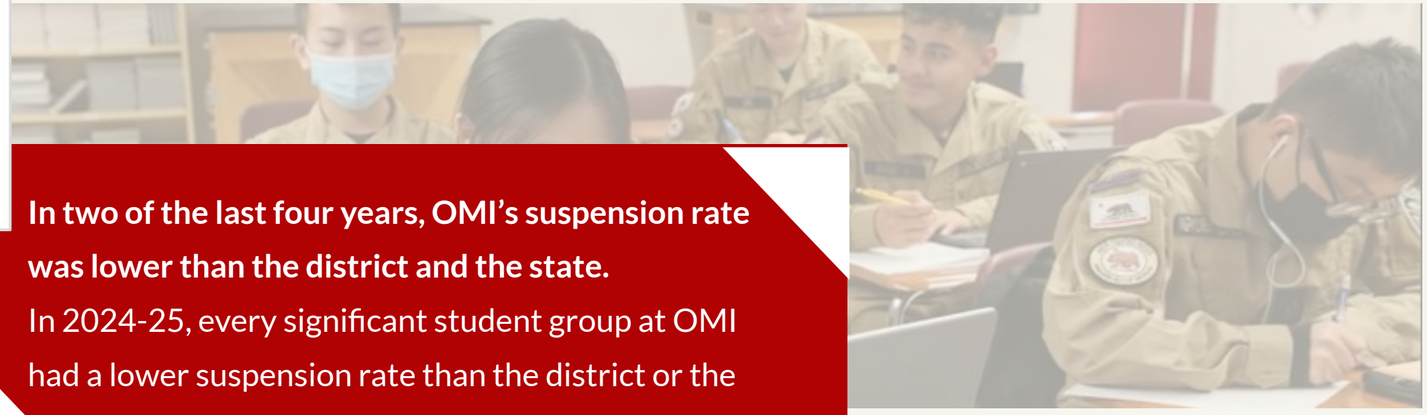
Chronic Absenteeism & Suspension Rates

Chronic absenteeism and suspension rates are indicators of academic engagement and school climate.



OMI has a lower rate of chronically absent students than the district or the state.
In 2025-26, every student group at OMI had lower chronic absence rates than the district or state.





In two of the last four years, OMI's suspension rate was lower than the district and the state.
In 2024-25, every significant student group at OMI had a lower suspension rate than the district or the state.

"This gives me peace of mind because I know my daughter is safe here." Maritza O. (parent)

***"OMI has even helped my children become leaders, teaching them to take initiative."* Celina GS (parent)**

Behind the Suspension Numbers

Suspensions only where the Education Code requires them

1. **Mandatory offenses only, not permissive ones**
   Every 2025-26 suspension was for an offense where the Education Code requires suspension (Ed. Code § 48915(c)), not a discretionary offense under § 48900. [SCHOOL TO CONFIRM COUNTS AND CATEGORIES]

2. **Zero suspensions for defiance, dress code, or decorum**
   Uniform, conduct, and classroom expectations are enforced through in-school supports, Honor Boards, and restorative practices, not suspension.

3. **Zero expulsions, 2021-22 through 2024-25**
   Structure, relationships, and the TAC cadre model do the work that exclusion does elsewhere.

2.0%
suspension rate, 2024-25 (Blue on the Dashboard)

4.5%
2025-26 rate

Where the law gives OMI discretion, OMI chooses support over suspension. The suspensions that remain are the ones state law does not leave to the school.

"(OMI) gives me peace of mind because I know my daughter is safe here." - Maritza O. (Parent)

At other schools, there's usually a lot of kids so it's hard to get noticed. I think OMI puts a lot of time and effort into acknowledging individual kids and the good qualities they bring." Mariam A. (11th grade)

Exit Data & Continuous Improvement

OMI takes the questions raised about student exits seriously. **It is our mission to be a home for <u>all</u> students performing below grade level.**

- Reviewing every exit during the charter term, including the reasons families give
- Analyzing state test data for students who left and students who stayed
- Speaking with families who have left OMI to understand their decisions
- Strengthening how we support cadets at risk of leaving and how we document
- Developing a written dismissal and Honor Board policy with clear safeguards and supports

OMI Has Earned It Because Of Our Amazing Cadets, Parents and Staff

"OMI gave me the chance to break out of my comfort zone and experience many things." Tommy N. (Alumni)



"I like the diversity and I get to see a new side of things with a military aspect. I've never been exposed to anything like this before so it's cool to see that different set of how things work."
Miriam A. 11th grade



"I chose OMI as my school of choice because of the legacy, the uniform and the environment." J.A 8th Grade

"OMI instilled in me discipline, confidence, and a commitment to personal and professional growth."
Phillip H. (Alumni)



Thank You

