

**OAKLAND ENROLLS
MEMORANDUM OF UNDERSTANDING
FOR PARTICIPATING CHARTER PARTNERS
(2020-2021 School Year)**

This **Memorandum of Understanding** (“**MOU**”) is entered into by American Indian Model Schools (“**Charter Partner**”) and Oakland Enrolls, a California Nonprofit Public Benefit Corporation, effective August 1, 2020 (“**Effective Date**”) Charter Partner and Oakland Enrolls are sometimes referred to in this MOU individually as “**Party**” and together as “**Parties.**”

BACKGROUND

Oakland Enrolls is responsible for the Oakland common charter application project. Prior to the Oakland common charter application project a fragmented system of school enrollment existed in Oakland, making it difficult for families to navigate the public-school enrollment process. The Oakland common charter application project aims to address this problem, in collaboration with the Oakland Unified School District, charter schools, and other stakeholders, by providing a universal enrollment process, where families can use one single platform to fill out one application for district schools and another for charter schools, applying to multiple schools at once. Charter Partner wishes to participate in this Oakland common charter application project, in order to enhance school choice, make the process for families easier, and share data to gain more insight into application and enrollment trends in Oakland. Therefore, in exchange for good and valuable consideration, the Parties agree as follows:

RIGHTS AND RESPONSIBILITIES

1. Description of Oakland common charter application Project.

- a. ***Timeline*** – Charter Partners participating in the city-wide charter enrollment system will follow the following timeline for the 2020-2021 School Year (“**SY**”). The timeline is subject to change at the discretion of Oakland Enrolls, and Charter Partner will be required to follow any changes implemented by Oakland Enrolls:
- October 23, 2020 – Review and finalize lottery preferences
 - November 16, 2020 – On Time application launch
 - January 2021 – Lottery verification
 - February 12, 2021 – On Time applications due
 - February 15, 2021 – Late applications launch
 - March 3-4, 2021 – Schools run lotteries, offers remain in Pre Offer status
 - March 5, 2021 – All offers made public by Oakland Enrolls
 - March 26, 2020 – On Time lottery confirmation deadline
 - March 29, 2020 – Bulk rescind of On Time lottery offers by Oakland Enrolls

- May 27, 2022 – Application closes for all schools (best guess date)

b. Key System Functionalities of Charter Enrollment Program

- i. *Multiple Languages*: the common application is available in five languages.
- ii. *Single Accept*: A family is only allowed to accept one offer per student in the common charter application system.
- iii. *On Time Lottery Offer Launch*: All Charter Partners will publicize On Time lottery offers to families on the same date.
- iv. *On Time Lottery Offer Rescind*: Oakland Enrolls will automatically rescind any outstanding On Time lottery offers on the same date, March 29 2020. Oakland Enrolls recommends a 10 business day offer expiration post On Time lottery offers, but this is not required.

c. Data Sharing Features – The Oakland common charter application project involves and requires data sharing related to applications, enrollments, transfers, waitlists, and accepted offers, as follows:

- i. By the start of December 2020, Charter Partner will share their Fall 1 Submission CALPADS 8.1 Student Profile List as of October 2020;
- ii. Oakland Enrolls will use the CALPADS data to assess the full enrollment pipeline, subgroups enrollment information, and pipeline attrition (see [Oakland Enrolls – Spring Enrollment Reports](#)). Oakland Enrolls agrees to handle this data in accordance with the terms set out in **Appendix C**.
- iii. Shared data will also be used for joint marketing and outreach activities by the Parties and Oakland Enrolls' individual marketing and outreach activities, in accordance with applicable law.
- iv. Charter Partner represents and warrants that in assigning the applicable Student Profile Data to and sharing information with Oakland Enrolls including, but not limited to (Confidential Information as defined in Appendix C) that Charter Partner is in compliance with the provisions of FERPA, and any amendments thereto. Oakland Enrolls represents and warrants that it is also in compliance with any applicable provisions of FERPA, if any, and any amendments thereto. Furthermore, Charter Partner represents and warrants that it has the requisite consents and is allowed under FERPA, and other applicable laws, to assign Student Profile Data with Oakland Enrolls that Oakland Enrolls would then share with third parties for research purposes. Nothing in this Agreement may be construed to allow either Party to maintain, use, disclose or share information in a manner not allowed by state or federal law or regulation.

2. Charter Partner's Commitments.

- a. Charter Partner will complete the following Appendixes:
 - i. **Appendix A** – Confirmation of Commitments and Services.
 - ii. **Appendix B** – Key Organization Contacts and Optional Work Groups
- b. Oakland Enrolls implements the charter enrollment program, in part, through its use of SchoolMint, an online school enrollment platform. To participate in the charter enrollment program, Charter Partner must create a SchoolMint portal and give Oakland Enrolls access to Charter Partner's SchoolMint portal. Charter Partner agrees and understands that Oakland Enrolls will have the certain access to data and the permission to alter data on Charter Partner's SchoolMint portal as stated in *Oakland Enrolls Multi Org Access*, attached to this MOU **Appendix D**.
- c. Charter Partner will be responsible for ensuring that the applications are accurate and updated in accordance with parent and/or legal guardian wishes.
- d. Charter Partner will only accept applications to its school(s) through the Oakland common charter application project. All applicants to Charter Partner's school(s) must submit an Oakland Enrolls common charter application during the On Time (Open Enrollment) and Late (Post Enrollment) Application periods during the common application timeline. Charter Partner will not create or distribute a school-specific application for any grades it serves and will only accept applications per the Oakland Enrolls common application timeline.
- e. Charter Partner will provide information to Oakland Enrolls for school choice collateral in a timely fashion and will maintain its editable [SchoolFinder](#) profile attributes.
- f. Charter Partner will use Oakland Enrolls' tools and protocols for lotteries, waitlist management, collecting verification documentation, and communicating offers to families. If the tools provided by Oakland Enrolls cannot accommodate specific lottery configurations, Oakland Enrolls will collaborate with the software vendor and Charter Partner to develop a solution.
- g. Charter Partner will not require verification documentation before running any lottery unless approved by Oakland Enrolls.
- h. Charter Partner will publicly post on each of its schools' websites links to Oakland Enrolls website and display the common application verbiage and lottery date(s) on or before launch as specified in 1.a.

- i. Charter Partner will participate in Oakland Enrolls community outreach activities (such as school fairs and targeted events with community-based organizations) and Charter Partner will host at least one event for transition grade students (5th and 8th grade) focused on the common application, timeline, and resources. Oakland Enrolls plans to finalize outreach activities and communicate to Charter Partners by October 2020.
- j. Charter Partner will have the appropriate people in its organization review Oakland Enrolls' training materials, best practices, and checklists. Charter Partner will ensure staff attend training session as required.
- k. ***Participation Requirements and Estimated Fees***
 - i. ***Enrollment System Requirements:*** Charter Partner will purchase the following SchoolMint application modules through Oakland Enrolls for a licensing period of September 1 2020 through August 31 2021:
 - 1. Common Application (MultApply), Communication, Lottery, Waitlist with a cost of \$4,000 per school
 - ii. ***Optional Enrollment System components:*** Charter Partner may opt to purchase the following modules from SchoolMint. Oakland Enrolls recommends the module license(s) start/end dates align with the Common Application (MultApply) license:
 - 1. Registration
 - 2. Registration with ReEnrollment
 - 3. Registration with ReEnrollment and Interest Tracker
 - iii. ***Optional Oakland Enrolls services:*** Charter Partner may opt to purchase the following optional Oakland Enrolls services (dates of service):
 - 1. On Time Applications Operations Support (Nov 2020 – Feb 2021)
 - 2. Managing Ongoing Offers (Mar 2021 – Jun 2021)
 - 3. Managing Registration (requires purchasing SchoolMint Registration module | Mar 2021 – Jun 2021)
 - 4. Custom Reports and Seat Offer Tool (varies)
 - 5. Custom Outreach & Marketing Plan and Support (Sep 2020 – Apr 2021)
- l. ***Summary of Roles and Responsibilities***
 - i. Oakland Enrolls has summarized role and responsibilities for Charter Partner, Oakland Enrolls, and SchoolMint to help provide clarity around who is responsible for what. This is not mean to be comprehensive, rather a summary to provide guidance. See **Appendix E**.
- m. ***Indemnification*** – Charter Partner agrees that it will defend, indemnify and hold harmless Oakland Enrolls and its officers, directors, employees, and agents (collectively, the “indemnified parties”) against and from any and all claims, actions, demands, losses, causes of action, damages, expenses or liabilities, including attorneys’ fees, to which any Indemnified Party may become subject or which it may suffer as a result of or arising out of any negligent, willful or

reckless acts or omissions, breach of this MOU, dishonesty or fraud of or by Charter Partner, its agents, employees or representatives.

- n. ***LIMITATION OF LIABILITY.*** CHARTER PARTNER AGREES AND UNDERSTANDS THAT OAKLAND ENROLLS SHALL NOT BE LIABLE UNDER ANY CIRCUMSTANCES, WHETHER IN CONTRACT, TORT, EQUITY OR OTHERWISE, FOR ANY INDIRECT, INCIDENTAL, CONSEQUENTIAL, SPECIAL, PUNITIVE OR EXEMPLARY DAMAGES (EVEN IF SUCH DAMAGES ARE FORESEEABLE, AND WHETHER OR NOT OAKLAND ENROLLS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES), INCLUDING DAMAGES FOR LOSS OF PROFITS, ANY OVERHEAD EXPENSES, OR COMMITMENTS TO THIRD PARTIES. OAKLAND ENROLLS' MAXIMUM AGGREGATE LIABILITY ARISING FROM OR RELATING TO THIS MOU SHALL BE LIMITED TO THE AMOUNTS PAID BY CHARTER PARTNER TO OAKLAND ENROLLS UNDER THIS MOU.

3. **Oakland Enrolls' Commitments.** In addition to the services described elsewhere in this MOU, Oakland Enrolls commits to the following:

- a. Charter Partner's participation in the uniform charter enrollment program will be fully supported by Oakland Enrolls, with training and development of school staff, standard operating procedures, communication templates and best practices, direct support provided to families, school and sector-level data analysis, and information sharing including real-time visibility of applications to Charter Partner's school(s).
- b. Oakland Enrolls will collaborate with Oakland Unified School District on choice collateral, options activities, summary data sharing, and developing a blueprint towards a citywide application system.

Oakland Enrolls is and will continue to exploring new policies to enhance the universal enrollment process. In assessing new policies, Oakland Enrolls retains ultimate decision-making authority to decide what policies to implement and how, but it commits to discussing potential policies with the Steering Committee and to bring them to the Council for review.

4. **Mutual Commitments, Terms Conditions.**

- a. ***Term*** – The term of this MOU is from August 1, 2020 to July 31, 2021 ("**Term**"), at which point Oakland Enrolls shall have no obligation or duties to Charter Partner to provide services under this MOU. Charter Partner's obligation to pay any fees due under this MOU shall survive the Term of this MOU. The provisions of section 3(k) and 3(l), all of the provisions of section 4, and any other provision reasonably intended to survive the Term of this MOU will survive the termination or expiration of this MOU.

- b. **Governing Law** – This MOU is governed by California law, without regard to any conflict of laws rules. Each Party consents to exclusive jurisdiction and venue of state or federal courts located in Oakland, California.
- c. **Assignment** – Charter Partner may not assign its rights or obligations under this MOU without the express prior written consent of Oakland Enrolls.
- d. **Integration, Modification, Waiver** – This MOU, and its appendixes, constitute the entire agreement between the Parties and supersedes all prior discussions, negotiations, and agreements whether oral or written relating to Oakland Enrolls and the Oakland common charter application project. This MOU may be amended or modified only in writing, signed by all Parties. No delay or omission by Oakland Enrolls in exercising any right under this MOU will operate as a waiver of that or any other right provided for in this MOU.
- e. **Counterparts, Electronic Signatures and Delivery** – This MOU may be executed in counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. The Parties agree that electronic signatures of the Parties shall have the same force and effect as original signatures. Delivery of a copy of this MOU by facsimile, electronic mail as an attached file (e.g., pdf), or by any other electronic means (e.g., DocuSign) shall be acceptable to bind the Parties and shall not in any way affect this MOU’s validity.

WITH INTENT TO BE BOUND, Charter Partner and Oakland Enrolls, by signature of their authorized representatives, have executed this MOU as of the Effective Date.

Accepted and agreed to by: American Indian Model Schools Accepted and agreed to by: Oakland Enrolls

Signature: _____

Name: _____

Title: _____

Signature: 

Name: Luis Rodriguez

Title: FY20 Executive Director

Signature: 

Name: Lisa Gibes de Gac

Title: FY21 Executive Director

APPENDIX A:

Confirmation of Commitments and Services for

August 1, 2020 through July 31, 2021

Charter Partner will purchase:	Brief Description	Cost Per School
Required Services		
X Yes	Common charter application (MultApply) with SchoolMint modules: application, communication, lottery, and waitlist. Fee includes enhancements and translation costs	\$4,000 per school
Optional Services offered by Oakland Enrolls (see Appendix F for description of services) Please select Yes or No <i>Note: the items below are not SchoolMint modules. Please contact SchoolMint to purchase Registration, Re-Enrollment, or Interest Tracker modules.</i>		
<input type="checkbox"/> Yes <input type="checkbox"/> No	On Time Applications Operations Support	\$3,000 per school (Nov 1 2020- Feb 28 2021)
<input type="checkbox"/> Yes <input type="checkbox"/> No	Managing Ongoing Offers	\$3,000 per school (Mar 1 2021 – Jun 30 2021)
<input type="checkbox"/> Yes <input type="checkbox"/> No	Managing Registration	\$8,000 per school (Mar 1 2021 – Jun 30 2021)
<input type="checkbox"/> Yes <input type="checkbox"/> No	Custom Reports and Seat Offer Tool	\$2,500 per school (varies)
<input type="checkbox"/> Yes <input type="checkbox"/> No	Custom Outreach & Marketing Plan and Support	\$8,500 per school (Sep 1 2020 – Apr 30 2021)
Total Cost		
American Indian Public Charter School, American Indian Public Charter School II, and American Indian Public High School	# Schools	3
	TOTAL COST	

Note: You must sign up for the Required Services. Please select if you plan to use any of the Optional Services or select No.

Accepted and agreed to by: American Indian Model Schools

Signature: _____

Name: _____

Title: _____

APPENDIX B:

Key Organization Contacts

In the spaces provided below please review, update, and/or identify the key contacts in your organization for each of the following roles. If a staff member serves multiple roles, please enter their name and contact information for each role.

Representative for Oakland Enrolls Council: Each Charter Partner should have at least one member on the Oakland Enrolls Council. Ideally, council members have **decision-making authority** at their school and are well-informed about enrollment processes and challenges at their organization. Oakland Enrolls expects a council member to attend quarterly meetings to participate in key decision making.

<u>School(s)</u>	<u>Name</u>	<u>Title</u>	<u>Email</u>	<u>Phone</u>
AIMS (all) (510) 893-8701 x.13	Marisol Magana	Operations Director	marisol.magana@aimschools.org	O: C: (510) 220-9985

Lottery Configuration Signatory: A person with **the authority to** review and approve final lottery preferences, weightings, and quotas prior to the Round 1 launch. For a multi-school organization, please list a lottery configuration signatory for each school.

<u>School(s)</u>	<u>Name</u>	<u>Title</u>	<u>Email</u>	<u>Phone</u>
AIMS (all) (510) 893-8701 x.13	Marisol Magana	Operations Director	marisol.magana@aimschools.org	O: C: (510) 220-9985

Special Education information: Each Charter Partner should identify an individual, ideally an individual at each school, who Oakland Enrolls can contact when families have questions about Special Education services.

School(s)	Name	Title	Email	Phone
AIMS (all) x2	Tiffany Tung	Operations Manager	tiffany.tung@aimschools.org	(510) 893-8701

Website Updates: Each Charter Partner should identify an individual at each school who Oakland Enrolls can contact when website updates are required. This may be a centralized role for a CMO or each school may have individual contacts.

School(s)	Name	Title	Email	Phone

Operations contact(s): Charter Partner may have as many operations contacts as needed, ideally at least 1 per school. Operations contacts are staff at your organization who deal with applications and enrollment on a regular basis and need to be “in-the-know”. Please clearly identify the lead operations contact for each individual school in your organization (if applicable).

<u>School(s)</u>	<u>Name</u>	<u>Title</u>	<u>Email</u>	<u>Phone</u>
AIMS I + II	Evelin Palacios	Clerk	evelin.palacios@aimschools.org	510-893-8701
AIMS I + II	Kevin Ma	Clerk	kevin.ma@aimschools.org	510-893-8701
AIMS (all) 893-8701 x19	Alexander Lee	Administrative Assistant	alexander.lee@aimschools.org	(510) 893-8701
AIMS (all)	Aileen Wang	Clerk	aileen.wang@aimschools.org	
AIMS (all)	Benjamin Wang	Clerk	Benjamin.wang@aimschools.org	
AIMS (all) (510) 893-8701 x.13 C: (510) 220-9985	Marisol Magana	Operations Director	marisol.magana@aimschools.org	O:
AIMS (all) x23	Tiffany Tung	Operations Manager	tiffany.tung@aimschools.org	(510) 893-8701
AIMS (all)	Mayra Contreras	Registrar	mayra.contreras@aimschools.org	(510) 893-8701
AIMS (all)	Chaniel Clark	Enrollment Coordinator	chaniel.clark@aimschools.org	(708) 238-7699
AIMS (all) 893-8701	Laila Ahmad	Administrative Assistant	laila.ahmad@aimschools.org	(510) 893-8701

Outreach contact(s): Oakland Enrolls wants to ensure we have a clear point of contact at each participating school for outreach activities so we can stay in the loop on school level outreach and ensure staff are aware of Oakland common charter application activities. This may be the same person as previously listed or another person (and may vary school to school). Our goal is to get a better understanding of how much outreach Oakland common charter application and school partners do throughout the community.

<u>School(s)</u>	<u>Name</u>	<u>Title</u>	<u>Email</u>	<u>Phone</u>
AIMS (all)	Laila Ahmad	Administrative Assistant	laila.ahmad@aimschools.org	(510) 893-8701

APPENDIX C:

Policy Regarding Data Shared under the MOU

One of the purposes of the MOU is the sharing of information by Charter Partners with Oakland Enrolls to enable Oakland Enrolls to analyze enrollment data, in a manner that is consistent with the Family Education Records Privacy Act of 1974 (“FERPA”), in order to develop reports regarding application, offer, and acceptance patterns. Oakland Enrolls agrees to abide by the following policies with respect to certain data shared with it under the MOU.

1. In the performance of its services under the MOU, Oakland Enrolls may have access to or receive “Confidential Information,” which shall include: (i) student data comprised of (a) directory information, or (b) aggregate and individual level student information, including information that identifies or could reasonably be used to identify a particular student; and (ii) school level data comprised of information or data not generally known to the public which identifies or could reasonably be used to identify a particular school. Confidential Information does not include any information that (x) is or becomes generally known or available by publication, commercial use or otherwise through no fault of each Party; (y) lawfully obtained by each Party from a third party who has the right to make such disclosure; or (z) is released for publication by another Party in writing.
2. Oakland Enrolls will exercise at least the same degree of care with respect to Confidential Information that it uses with its own data and confidential information, but in no event less than reasonable care, to protect the Confidential Information from unauthorized use or disclosure. For example, Oakland Enrolls agrees to limit internal distribution of Confidential Information only to its employees and agents who have a need to know, and to take reasonable steps to ensure that the dissemination is so limited.
3. When transmitting Confidential Information, Oakland Enrolls will take reasonable steps to ensure that the following things are done:
 - a. Confidential Information is encrypted prior to transmitting it electronically.
 - b. Descriptions of the Confidential Information are not included with passwords.
 - c. Physical copies of Confidential Information are secure under lock and key, or that other sufficient physical access control measures are in place to prevent unauthorized access.
 - d. Confidential Information stored on portable or removable electronic media, such as electronic CDs, DVDs, or flash drives, is encrypted and that such media is stored under lock and key or in another controlled manner to prevent unauthorized access.
 - e. That workstations and laptops are password protected and that enabling screen locks are activated.
4. Within five business days of becoming aware of an unauthorized use or disclosure of Confidential Information, Oakland Enrolls shall promptly provide an impacted Charter Partner with notice of the unauthorized use or disclosure. In the event of an unauthorized use or disclosure, Oakland Enrolls shall cooperate with a remediation that Charter Partner reasonably determines is necessary to fulfill any reporting obligations required by law and to mitigate any effects of such unauthorized use or disclosure of the Confidential Information, including measures necessary to restore good will with teachers, students, or other stakeholders.

APPENDIX D:

Oakland Enrolls Access

Purpose: Building on the MOU, this document will help establish a clear understanding about the permissions and access levels Oakland Enrolls has while logged into participating school organization SchoolMint portals.

Overview: To improve Oakland Enrolls ability to support school organizations participating in the Common Application, SchoolMint has implemented an enhancement that simplifies how Oakland Enrolls can access portals of participating school organizations. Once logged into a participating school organization portal, Oakland Enrolls (OE admin) can perform the following actions (Yes). Please review this document and follow-up with julia.judge@oaklandenrolls.org if you have questions or concerns.

AREA	Yes or No	Notes
Edits to Student Family Information		
Can this OE admin edit information about existing guardians?	Yes	
Can this OE admin add new guardians to an existing applicant account?	Yes	
Can this OE admin edit information about a student like name, date of birth, and address?	Yes	
Can this OE admin update the account login?	Yes	
Can this OE admin update the account password?	Yes	
Can this OE admin update the account preferred language?	Yes	
Application Processing		
Can this OE admin edit application data?	Yes	
Can this OE admin attach sibling information to an application?	Yes	
Can this OE admin leave a note on an applicant's profile?	Yes	
Can this OE admin assign or remove priorities?	Yes	
Can this OE admin approve priorities?	NO	
Can this OE admin change the status of an application (revert to previous status)?	Yes	

Lottery Management		
Can this OE admin view the lottery configuration?	Yes	
Can this OE admin modify the lottery configuration?	Yes	With permission from lottery signatory or appointed school level lottery specialist
Can this OE admin view the results of the lottery?	Yes	
Can this OE admin make offers to eligible applicants?	Yes	Oakland Enrolls changes Pending Offers to Offers in bulk per the timeline and reverts to Offer status within 24 hours of bulk rescinding of Open Enrollment lottery Offers
Can this OE admin accept / reject offers on behalf of parents?	Yes	
Can this OE admin rescind offers?	Yes	Oakland Enrolls only Rescinds Offers in bulk per the On Time Offer expiration timeline
Communications		
Can this OE admin send school specific communications to families?	Yes	Oakland Enrolls only sends bulk communications to families that are not school specific in SchoolMint
Can this OE admin view the communications log to see messages that were previously sent?	Yes	
Can this OE admin edit school specific automated messages that get sent when triggered?	Yes	Oakland Enrolls creates standard automated messaging, schools may customize and Oakland Enrolls will load customized messages on their behalf
Settings		
Can this OE admin add new schools or edit information about existing schools (including grade levels)?	Yes	
Can this OE admin create new or edit existing school specific forms, including application templates?	Yes	Oakland Enrolls can edit the Common Registration and Common Re Enrollment forms. Oakland Enrolls does not edit school specific forms in their instance unless requested
Can this OE admin update the enrollment calendar dates (application open/close, enrollment open/close, etc.)?	Yes	
Can this OE admin create new events or edit existing events that families can RSVP to?	NO	

APPENDIX E:

Purpose: Provide guidance on primary and secondary responsibilities around key Oakland common charter application activities throughout the school year.

	OAKLAND ENROLLS	PARTICIPATING SCHOOLS	SCHOOLMINT
GATHER INFO FOR APPLICATION, LOTTERIES	primary	secondary	
CONFIRM LOTTERY PREFERENCES	secondary	primary	
BUILD APPLICATION	secondary		primary
MANAGE APPLICATION, PROVIDE TRANSLATIONS, PROVIDE MESSAGING	primary	secondary	
DATA CLEAN UP: DUPLICATES, AGE/GRADE INCONSISTENCIES***	primary	secondary	
DATA CLEAN UP: VALIDATE PRIORITIES, UNCONFIRMED ADDRESSES		only	
SUPPORT LOTTERY SETUP	secondary		primary
RUN LOTTERY		only	
BUILD REGISTRATION PACKETS	secondary*	primary	secondary
SETUP ONLINE REGISTRATION		primary	secondary
MANAGE ONLINE REGISTRATION		primary	secondary
ONGOING OPERATIONS SUPPORT	primary		secondary
PRODUCT USER TRAINING	primary		secondary
SCHOOLFINDER UPDATES	secondary**	primary	
OUTREACH: SCHOOL-SPECIFIC		only	
OUTREACH: GENERAL PROCESS	primary	secondary	

Primary – main party responsible for ensuring completion of the task

Secondary – support the main party with technical support, guidance, implementation support, and/or feedback

Only – sole party responsible for the task

* Oakland Enrolls creates common registration templates schools can customize to their needs

** Oakland Enrolls makes bulk updates to SchoolFinder around key dates and data, schools are responsible for school profile maintenance

*** Oakland Enrolls only does Data Cleanup during the On Time enrollment period

APPENDIX F:

Purpose: Describe the optional services offered by Oakland Enrolls in more detail

1. On Time Applications Operations Support (Nov - Feb) \$3,000

Oakland Enrolls creates an On-Time enrollment operations plan and completes the plan in partnership with school staff. Includes:

- Weekly report to school with summary of: number of new applications, number of cancelled applications, aggregated applicant demographics (race/ethnicity and region), analysis of type of priorities of applicants, and analysis of time/date of application
- Suggested messaging content and frequency for applicants
- Sending suggested messaging
- Tracking of success of messages (how many received/bounced, etc.) for follow up
- Phone outreach to families who applied to let them know of upcoming tours, events, etc.
- Phone outreach to follow up with school tour/event attendees to help them apply

Basically, this service would take the day-to-day SchoolMint application management off of your hands up until the lottery. This would also include answering school-specific questions from families (though this shouldn't take the place of families interacting with the school specifically).

Schools would need to:

- Confirm application questions in accordance with lottery
- Have the ability to help families apply who walk in to their school
- Work with Oakland Enrolls to build timelines around when communications should go out, to whom, what they should say (though OE would execute these)

2. Managing Ongoing Offers (Mar - Jun) \$3,000

Oakland Enrolls partners with a school to set up a process for managing Offers, Rescinds, Waitlist Confirmations, etc. through the end of the school year. Includes:

- Weekly report to school with summary of: number of new applications, number of cancelled applications, number of new accepts, status of registering students (if using SM registration), aggregated applicant demographics (race/ethnicity and region), analysis of type of priorities of applicants, and analysis of time/date of application
- Making/rescinding offers based on school's enrollment strategy
- Suggested messaging content and frequency for applicants in various application statuses, and execution of sending messaging
 - Ex: sending messaging to accepted students to outline registration process, sending messaging to offered students to let them know about orientation/events, etc.
- Tracking of success of messages (how many received/bounced, etc.) for follow up
- Follow up by phone with families with pending offers to make sure they're aware and help take action

Oakland Enrolls would also field school-specific registration questions (but would not include supporting families over the phone or in person) about the registration process. Oakland Enrolls runs this process, which goes up until the registration process.

Schools would need to:

- Run their lottery
- Work with Oakland Enrolls to build timelines around when communications should go out, to whom, what they should say (though OE would execute these)
- Work with us to determine how many offers should be made (though OE would execute)
- Be able to answer family questions when they call
- Be able to support their families through the entire registration process by phone or in person

3. Managing Registration (Mar - Jun) \$8,000

(Note: to receive this service, you must purchase SchoolMint's registration module)

Oakland Enrolls partners with a school to set up a process for managing school Registration through the end of the school year. Includes:

- Building and implementing a SchoolMint registration packet based on Oakland Enrolls template (if more than slight modifications to the template are necessary, this will lead to an increase in cost)
- Communications/outreach to families via SchoolMint, email, text, and phone
- Follow up by phone with accepted students who have not registered
- Follow up by phone with accepted students who are missing documentation or part of requirements
- Direct support to families over the phone and in person with completing the entirety of the registration packet
- Translation of all materials (registration forms and messaging) into all 5 of our languages
- Weekly summary of registration status movement

NOTE: this service does not include offer management (making and rescinding offers).

Schools would need to:

- Provide Oakland Enrolls with all registration questions/list of documentation needed
- Confirm with Oakland Enrolls when a family has successfully registered
- Provide Oakland Enrolls with deadlines
- Be available for families to ask school-specific questions (not related to registration)
- Verify registration documents (for example, Oakland Enrolls won't scrutinize a parent's ID to see if the address is correct)

4. Custom Reports and Seat Offer Tool (varies) \$2,500

Oakland Enrolls creates a more in-depth report to assist schools with analyzing enrollment policies and practices. Oakland Enrolls will also create the Seat Offer tool before lottery season and create custom reports during On Time enrollment, as well as Late enrollment. Oakland Enrolls will partner with schools to determine whether there are additional reports they would like to see that we can produce.

Reports Included:

1. Seat Offer Tool
2. Current Students Activity
3. Enhanced Demand Report

5. Custom Outreach & Marketing Plan and Support (Sept - April) \$8,500

Oakland Enrolls partners with schools to review and develop a custom outreach and marketing plan that schools will execute. Includes:

- One-on-one strategic planning session with historical school data to help school come up with individualized marketing plan (setting goals, strategies, tactics, and tracking metrics)
- Creation of calendar of social media posts and communications outreach
- Calendar of events throughout Oakland where school can attend
- Template for tracking event attendance
- Template for tracking outreach and marketing metrics and progress
- Graphic design support for marketing materials
- Translation services for marketing materials
- Support planning an options fair or other enrollment event at the school
- Recommended tactical/strategy changes throughout the enrollment season based on tracked metrics

Oakland Enrolls will not be marketing or distributing school-specific collateral during our outreach events or to families who come to Oakland Enrolls support center.

Schools would need to:

- Have an outreach point person with whom Oakland Enrolls can work and who can execute the marketing plan
- Conduct their own outreach activities such as attending school options fairs and community events on behalf of the school
- Track their progress toward goals and metrics
- Manage their own websites, social media channels, etc.
- Send/distribute their own communications to families (emails, text messages, mailers, flyers, etc.)
- Pay for all costs associated with running an event (facility, food, materials, technology, childcare, etc.)
- Pay for printing marketing materials that are produced for the school