



**CITY OF OAKLAND  
CHILDREN'S INITIATIVE OVERSIGHT COMMISSION  
REGULAR MEETING AGENDA  
Thursday, June 25, 2026**

4:00 PM

1 Frank H. Ogawa Plaza, Oakland, CA  
Hearing Room #2

**Oversight Commission Members:**

Edgar Rodriguez-Ramirez, Emma Batten-Bowman (District 1), Kym Johnson (District 4), Lisa Truong (District 6), Marcy Whitebook (District 1), Maria Sujo (District 5), Michael-Sesen Perrilliat (District 3), Michelle NewRingeisen (District 1), Natalia Rios (District 5), Peter Haviland-Eduah (District 1), Priya Jagannathan, Rickey Jackson (District 3), Sam Davis (District 1)

**PUBLIC PARTICIPATION**

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

**OBSERVE:**

**Please click the link below to join the meeting:**

<https://us06web.zoom.us/j/84549958561>

Phone one-tap:

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Join via audio:

+1 669 444 9171 US

+1 720 707 2699 US (Denver)

+1 253 205 0468 US

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 719 359 4580 US

+1 646 931 3860 US

+1 689 278 1000 US

+1 301 715 8592 US (Washington DC)

+1 305 224 1968 US

+1 309 205 3325 US

+1 312 626 6799 US (Chicago)

+1 360 209 5623 US

+1 386 347 5053 US

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

**Comment in advance:**

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

**In-Person:**

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

If you have any questions about these protocols,  
please e-mail Jennifer Cabán at [JCaban@oakland.ca.gov](mailto:JCaban@oakland.ca.gov).

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

|          | <b>AGENDA ITEM</b>                                                                                                                                                                                                                         | <b>SCHEDULE</b> | <b>ACTION</b> | <b>ATTACHMENTS</b>                  |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|---------------|-------------------------------------|
| <b>1</b> | <b>Welcome</b>                                                                                                                                                                                                                             | 04:00 PM        | AD            |                                     |
| <b>2</b> | <b>Roll Call</b>                                                                                                                                                                                                                           | 2 Minutes       | AD            |                                     |
| <b>3</b> | <b>Review of Agenda &amp; Values</b>                                                                                                                                                                                                       | 5 Minutes       | AD            |                                     |
| <b>4</b> | <b>Open Forum (Non-Agendized Items)</b>                                                                                                                                                                                                    | 5 Minutes       | AD            |                                     |
| <b>5</b> | <b>Presentation</b> <ul style="list-style-type: none"> <li><b>American Institutes for Research (AIR) - Oakland Children's Initiative Evaluation Partner Presents:<br/><i>Economic Impact Study and Impact Design Report</i></b></li> </ul> | 60 Minutes      | I             | Attachments 1 & 2, Appendices 1 & 2 |
| <b>6</b> | <b>Accountability Officer Update</b>                                                                                                                                                                                                       | 30 Minutes      | A*            | Attachment 3                        |
| <b>7</b> | <b>Wrap-Up &amp; Next Steps</b>                                                                                                                                                                                                            | 5 Minutes       | AD            |                                     |

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

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

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

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



# Our Community Agreements

## Respect, Integrity & Trust

Speak your truth with curiosity and respect and be honest and constructive in disagreements. Ensure your communication reflects integrity in how you speak and receive information.

## Accountability & Engagement

Show up both physically and emotionally. Be accountable for your participation and commitment to the group's goals. Be intentional about how time is spent, ensuring we cover everything on the agenda and remain transparent about what is scheduled.

## Curiosity & Accessibility

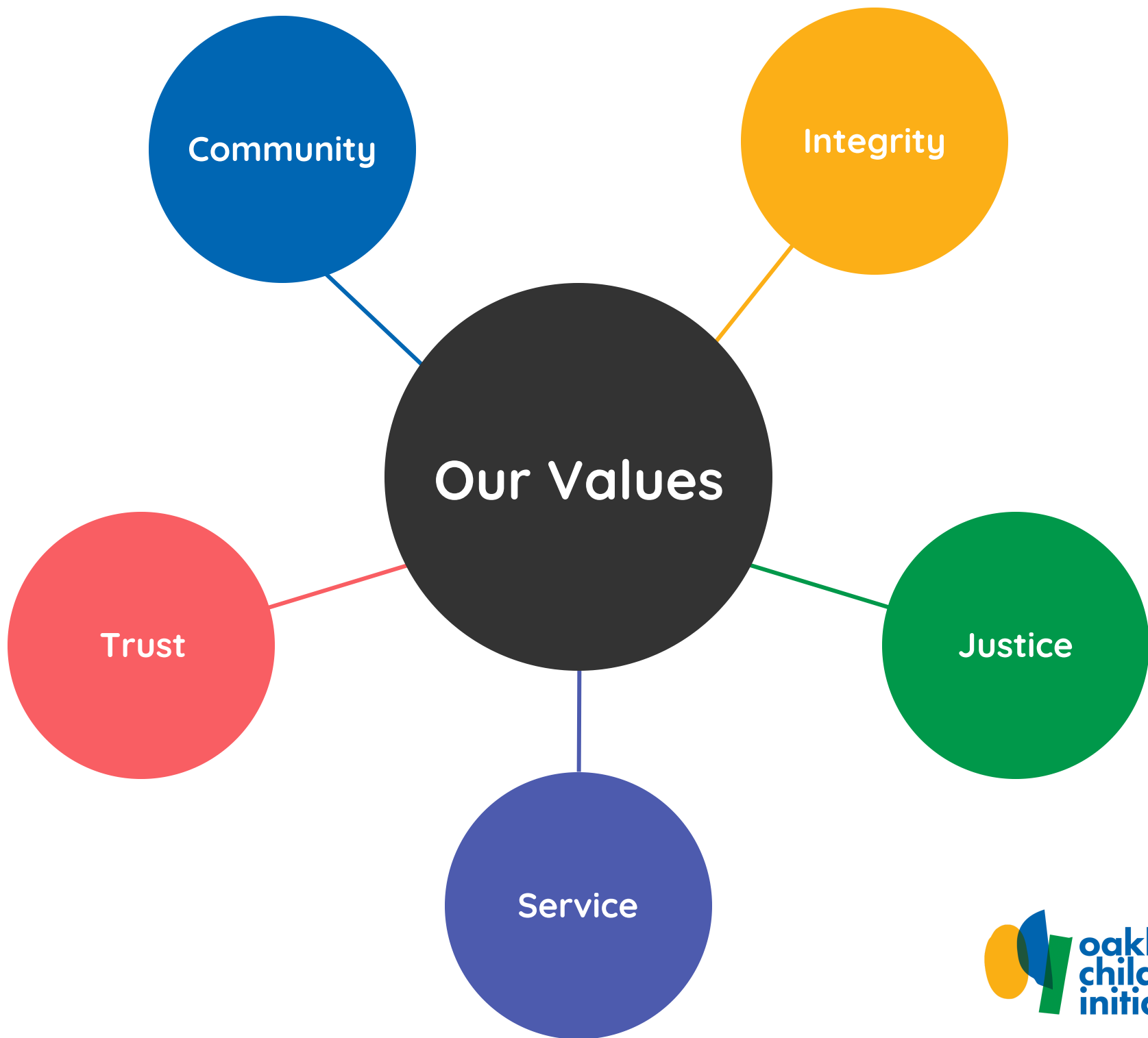
Lean into curiosity, ask questions, and make information and processes accessible to all.

## Community Voice & Inclusivity

Center and channel the community's voice, ensuring that diverse perspectives are heard and valued.

## Levity & Fun

Embrace a positive and enjoyable atmosphere, incorporating levity and fun into the process





# How OCI Funds Are Used: Early Data on the Economic Impact of the Oakland Children's Initiative

OCI Commission Meeting

June 2026

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# Objectives

- Show how the Economic Impact Study fits in the overall OCI evaluation
- Describe the methodology we used to conduct the study
- Summarize the study report and answer your questions about it



# Evaluation Overview

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## – Economic Impact Study

- How are funds being used?
- What is the predicted economic impact of OCI?

## – Process Study

- How is OCI implementation going?

## – Outcome/Impact Study Design

- How can the City of Oakland measure the impact of OCI in the future?





# Research Questions

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1. How do OCI investments map onto OCI goals?
2. How are OCI investments distributed across Oakland?
3. What value do OCI investments add over and above existing funding?
4. What is the projected economic impact of OCI investments?

At this stage, we can answer these questions for Fiscal Year 2024. We present findings based on available data, which vary across implementation partners and their subcontractors.

# The Big Picture: FY 2024 Investments

College Access Fund

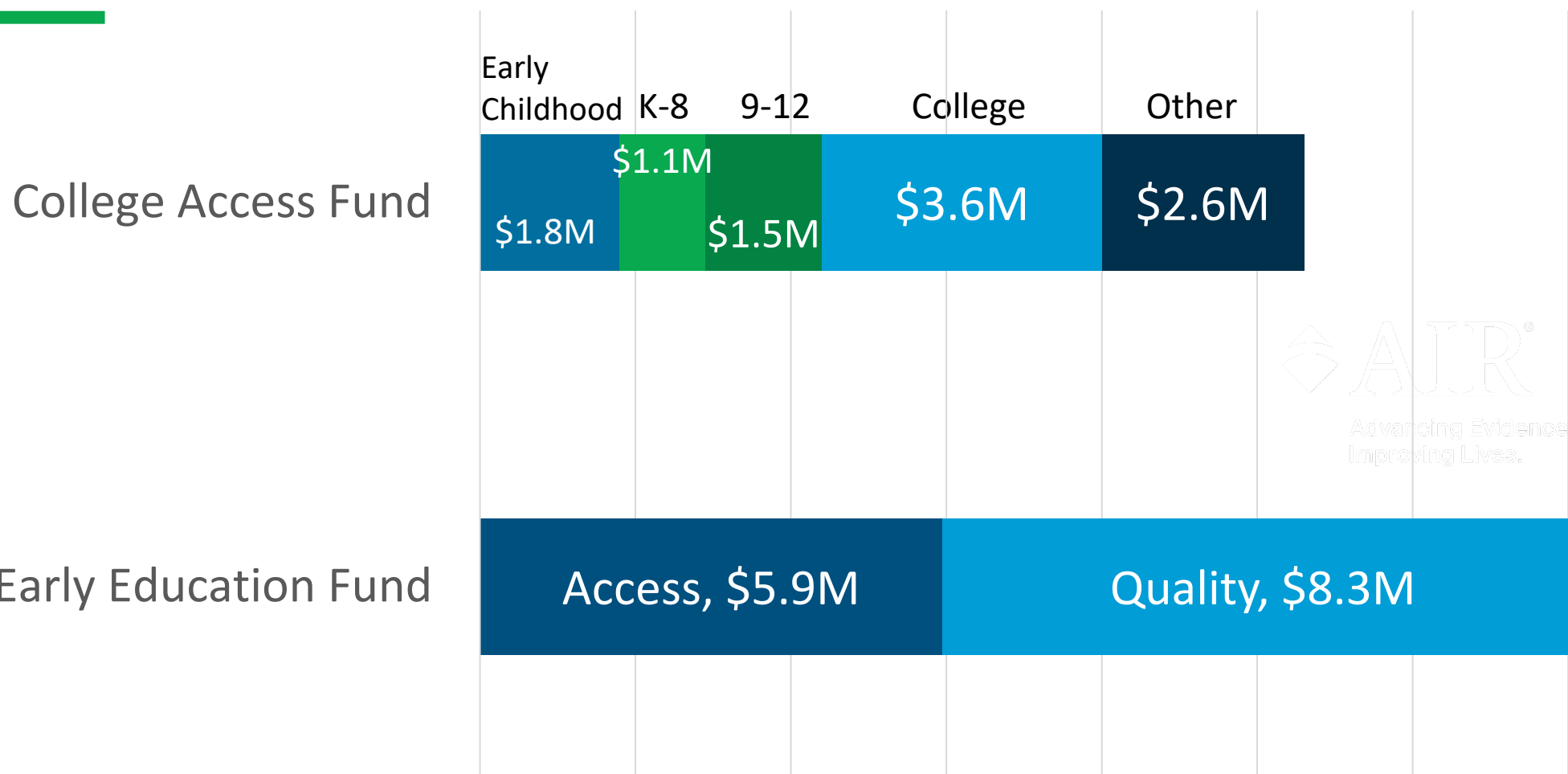
\$10.6M

Early Education Fund

\$14.2M



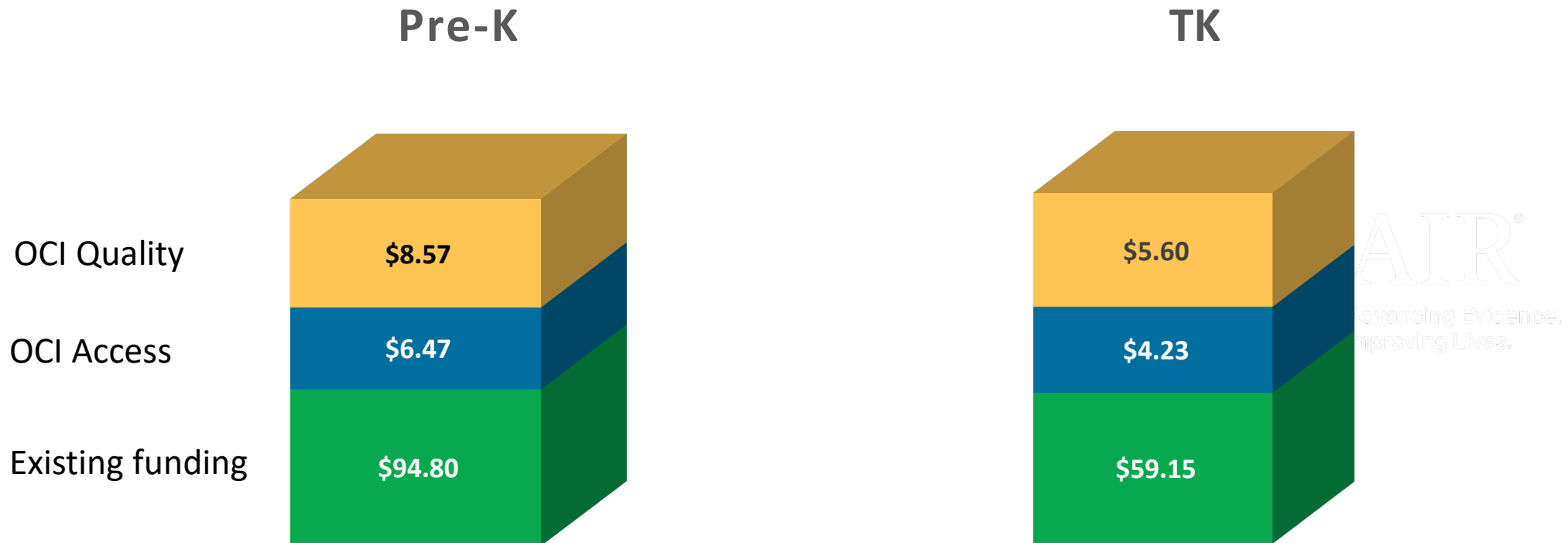
# The Big Picture: FY 2024 Investments



# Who Benefited from These Investments?

- Early Education Fund investments benefited families and children served by the Oakland Unified School District (Pre-K and Transitional Kindergarten programs) and by the City of Oakland Early Childhood and Family Services Program (COOECFS, Head Start)
- OUSD investments included playgrounds, family navigators, teacher professional development, and classroom materials
- COOECFS investments included keeping three sites in East Oakland open and providing support for some program-wide services (e.g., kitchen)

# OCI investments increased OUSD Pre-K funding by 16% and Transitional Kindergarten (TK) funding by 17%



# Who Benefited from These Investments?

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College Access Fund investments benefited families, children, and students in:

- » The Brilliant Baby Program
- » The Kindergarten to College Program
- » OUSD Elementary, Middle, and High Schools
- » College



Most of these investments were administered through community-based subcontractors, who provided help with college savings accounts (CSAs), planning for college, tutoring/ mentoring, and scholarships

# Who Benefited from These Investments?

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Across both funds, children and families who benefited included primarily:

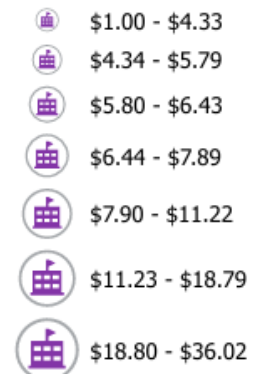
- Students enrolled in OUSD schools and their families
- Graduates from OUSD enrolled in college
- Children and families eligible for Head Start
- Children and families in neighborhoods with less educational opportunity

The distribution of OCI investments was closely aligned with the OCI objectives as stated in the OCI Ordinance.



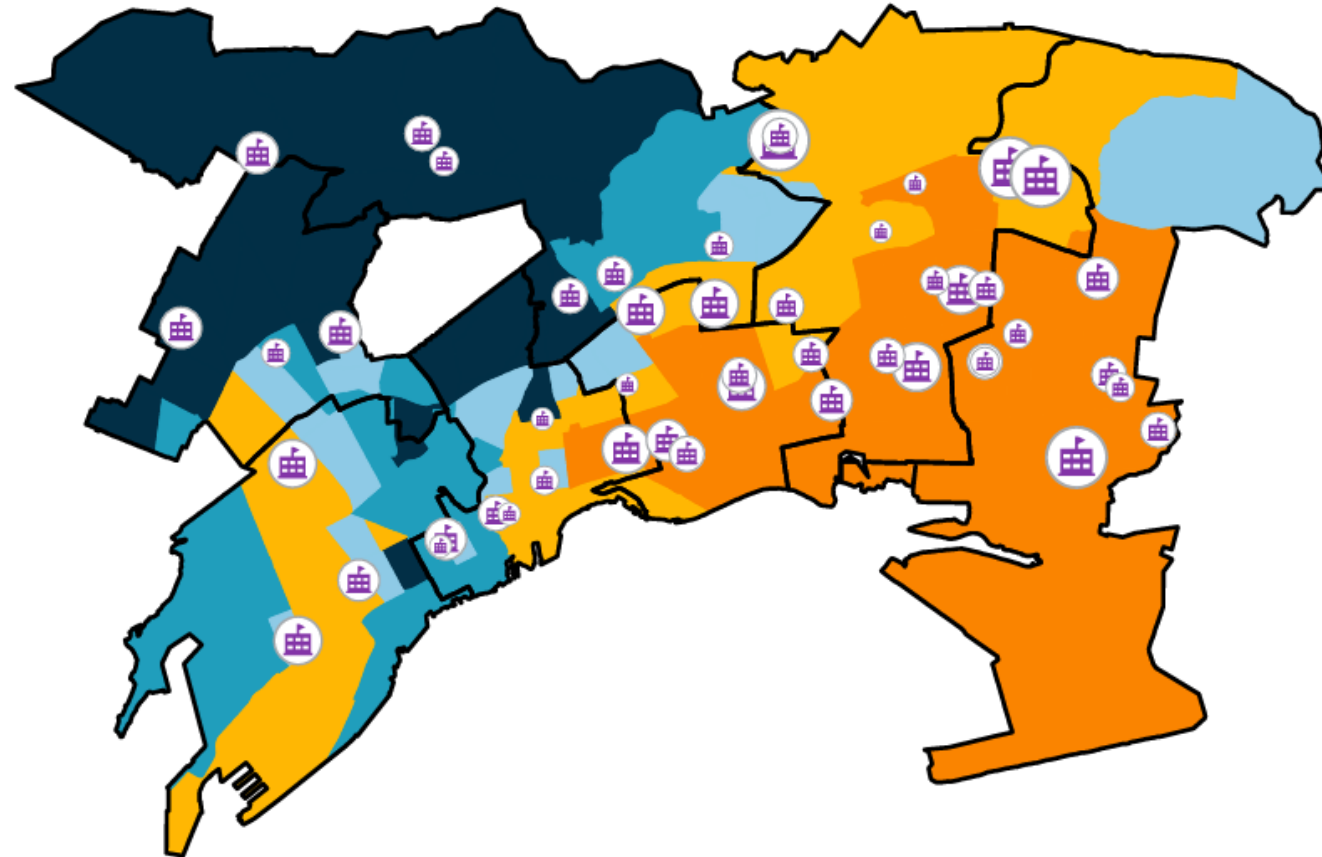
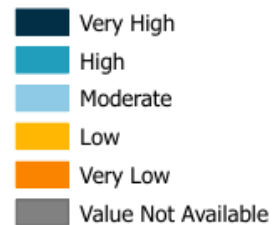
# OCI investments in OUSD early education programs were largest in neighborhoods of lowest educational opportunity

OCI Annualized investments per PreK, TK, and SpEd children per day by site FY 24



Council District Borders

2023 Education Child Opportunity Index

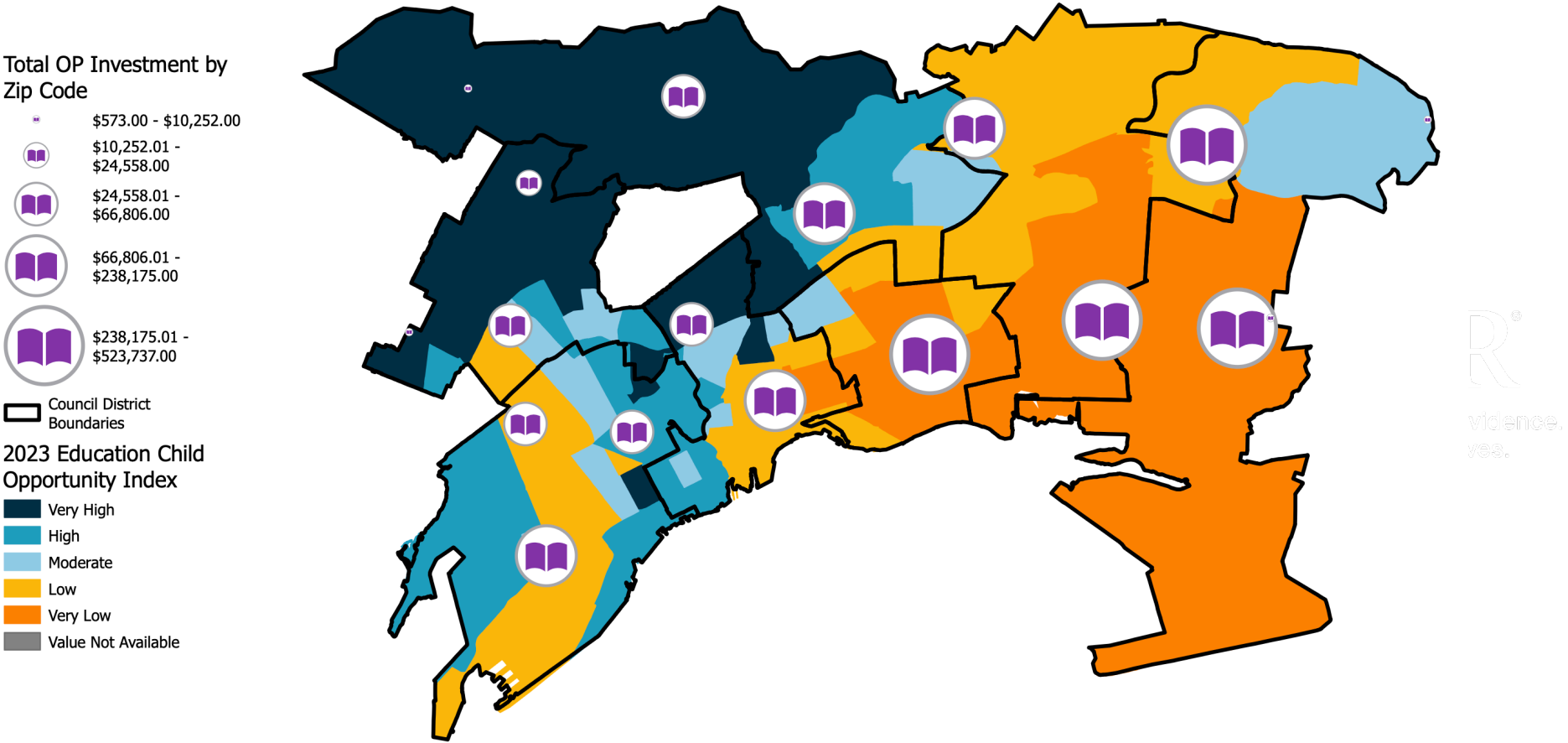


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source: Child Opportunity Index data, FY24 OUSD invoice data and OUSD site address data.



# OCI Investments for Brilliant Baby and K2C were largest in neighborhoods of lowest educational opportunity



Source. Child Opportunity Index data and OP FY24 Supplementary RBA Metric Data Tables.

# Preliminary Economic Impact Estimates: Our Approach

- We do not have actual estimates of OCI's impact yet, so we calculated projected future impact
  - We used published research to project longer-term benefits of OCI investments
  - We projected the **expected** broader economic impact of OP scholarships, contributions to college savings accounts, and investments in early education by combining the partners' Results Based Accountability (RBA) measures with these estimated benefits
  - We focused our analysis on **selected** RBA measures that have a **research base** regarding **impacts and/or cost-benefit analyses**

# The projected economic impact of OCI is significant

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- Drawing on this literature base, all OCI investments in the Early Education and College Access Funds are projected to have substantial positive long-term payoffs
- These projections result in benefit-cost ratios ranging from 3 to more than 100
- OCI is likely to be a good economic investment for the City of Oakland



# Based on the literature, early education investments have significant long-term benefits

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- A realistic expected return on every dollar invested in high-quality early education is \$3 to \$4 (Karoly, 2016)
- The OCI investment of \$12.4M in ECE in FY 2024 is likely to yield an economic payoff of between \$37M and \$50M
- Academic consensus is that public investments targeting young children, especially children who face economic disadvantages, have the greatest long-term benefits for society

# Based on the literature, the projected benefits of increasing college access and supporting college completion are even larger

| OCI investment                                                 | Pathway by lifetime earnings                                          | Projected economic impact |
|----------------------------------------------------------------|-----------------------------------------------------------------------|---------------------------|
| Brilliant Baby early college savings accounts                  | Impact of increased likelihood of college degree on lifetime earnings | \$120M                    |
|                                                                | Projected lifetime impact on state GDP                                | \$286M                    |
| K2C program participation                                      | Impact of increased likelihood of college degree on lifetime earnings | \$134M                    |
|                                                                | Projected lifetime impact on state GDP                                | \$319M                    |
| Increased college graduation rate for Oakland Promise scholars | Impact of increased likelihood of college degree on lifetime earnings | \$327M                    |
|                                                                | Projected lifetime impact on state GDP                                | \$781M                    |

# Projected benefits will vary depending on OCI's actual impact

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- Do increases in ECE access and quality translate into longer-term academic gains?
- Do increases in college access, college mindset, and financial resources cause more OUSD students to enroll in college?
- Do increases in student enrollment in college translate into more degrees?
- Do those degrees have as much value in the labor market as they had in the past?

Bottom line: OCI funds what matters, and the projections are positive, but we need an impact evaluation with long-term data to know for sure.

# Thank you!

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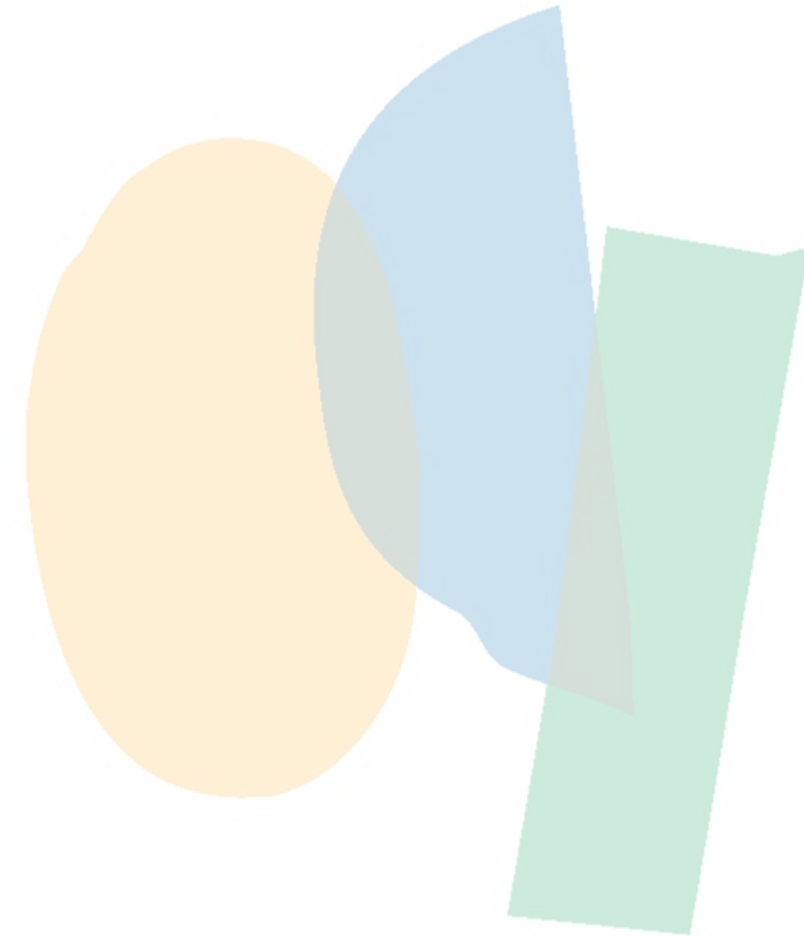
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# Design for an Impact Evaluation of the Oakland Children's Initiative

Oakland Children's Initiative Commission Meeting

June 2026



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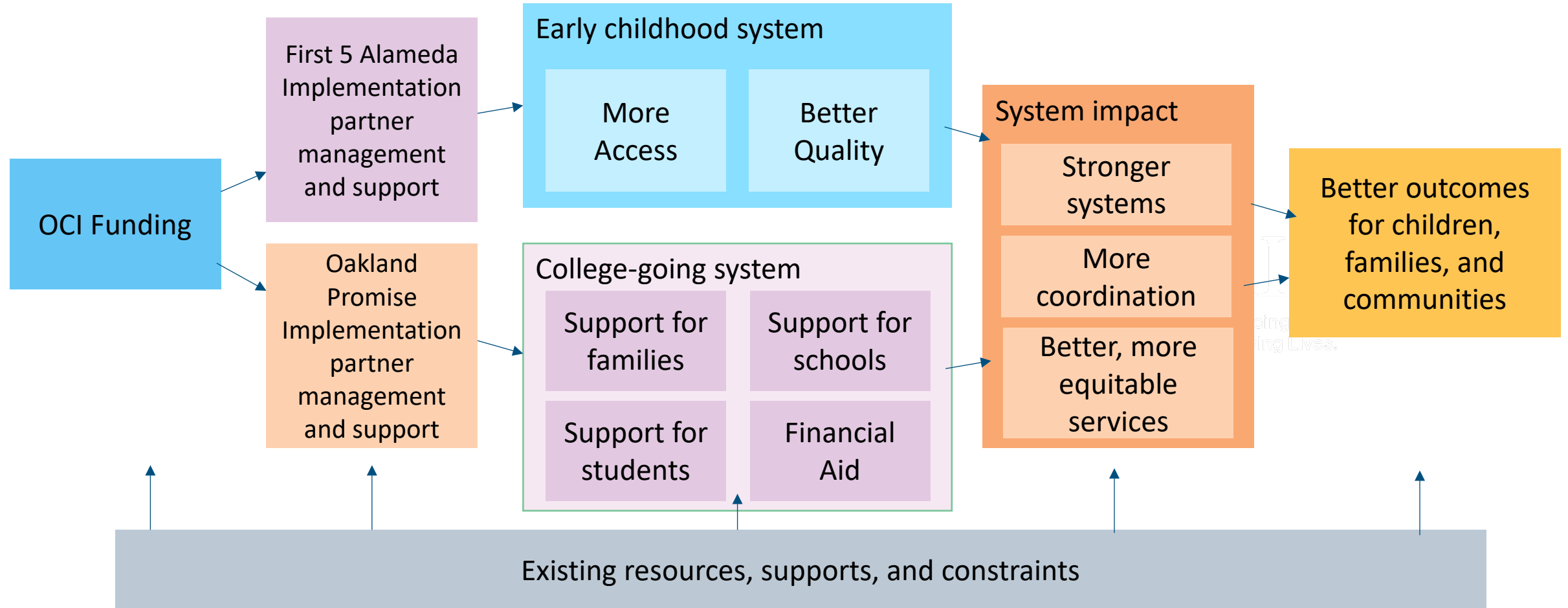


# Objectives

- Present a study design framework for an OCI impact evaluation
- Summarize the OCI impact design report and answer your questions about it
- Discuss design options and remaining decisions
- Help the OCI Accountability Officer launch a successful and useful impact evaluation in 2027-2028



# The study design is based on this OCI logic model



# Questions an impact study will address

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- **System-level impact**—How does OCI affect the **service infrastructure** for children, youth, and families in Oakland, and **collaboration** and **coordination** among service providers?
- **Service reach**—Does OCI increase families' **awareness** of, **access** to, and **participation** in ECE and college access services?
- **Child, youth, and family outcomes**—How does OCI influence child and family **well-being**, educational **aspirations**, academic **outcomes**, and college **success**?
- **Equity**—Does OCI increase **equity** in access to high-quality ECE and college success by reducing gaps by **neighborhood**, **income** group, and **race** or **ethnicity**?

# Levels of impact

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**Service  
Providers  
and Staff**

**Children,  
Youth, and  
Families**

**Community**

# Data Sources

**Service  
Providers  
and Staff**

**Children,  
Youth, and  
Families**

**Community**

Program Records and RBA Measures

Staff/Provider surveys

Family Surveys

Administrative Outcome Data

# Detailed Examples in Report

Exhibit 5. Sample Data Sources for Analyzing Community-Level Impacts of OCI Funding

| Construct                   | Indicators                                                                                                | Possible data sources                                                                                                                                                                                                                                                                                         |
|-----------------------------|-----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Child care affordability    | Out-of-pocket child care expenses for 4-year-olds as a share of household income                          | American Community Survey                                                                                                                                                                                                                                                                                     |
| Child care availability     | Enrollment data for 4-year-olds                                                                           | American Community Survey                                                                                                                                                                                                                                                                                     |
| Best place to raise a child | Child Opportunity Index                                                                                   | American Community Survey, synthesized by diversitydatakids.org (Noelke, et al., 2025).                                                                                                                                                                                                                       |
| Educational attainment      | High school graduation<br>College enrollment<br>College degree attainment                                 | American Community Survey                                                                                                                                                                                                                                                                                     |
| Residential stability       | Number of years in current residence and/or in current community (especially relevant for young families) | American Community Survey                                                                                                                                                                                                                                                                                     |
| Economic development        | Employment and earnings<br>Share of jobs requiring advanced degrees<br>Real estate trends<br>Tax basis    | American Community Survey<br>Current Employment Statistics Survey (BLS)<br>Current Population Survey<br>Job Openings and Labor Turnover Survey (BLS)<br>Occupational Employment and Wage Statistics (BLS)<br>Housing Statistics and Real Estate Market Trends (NAR)<br>California State Board of Equalization |

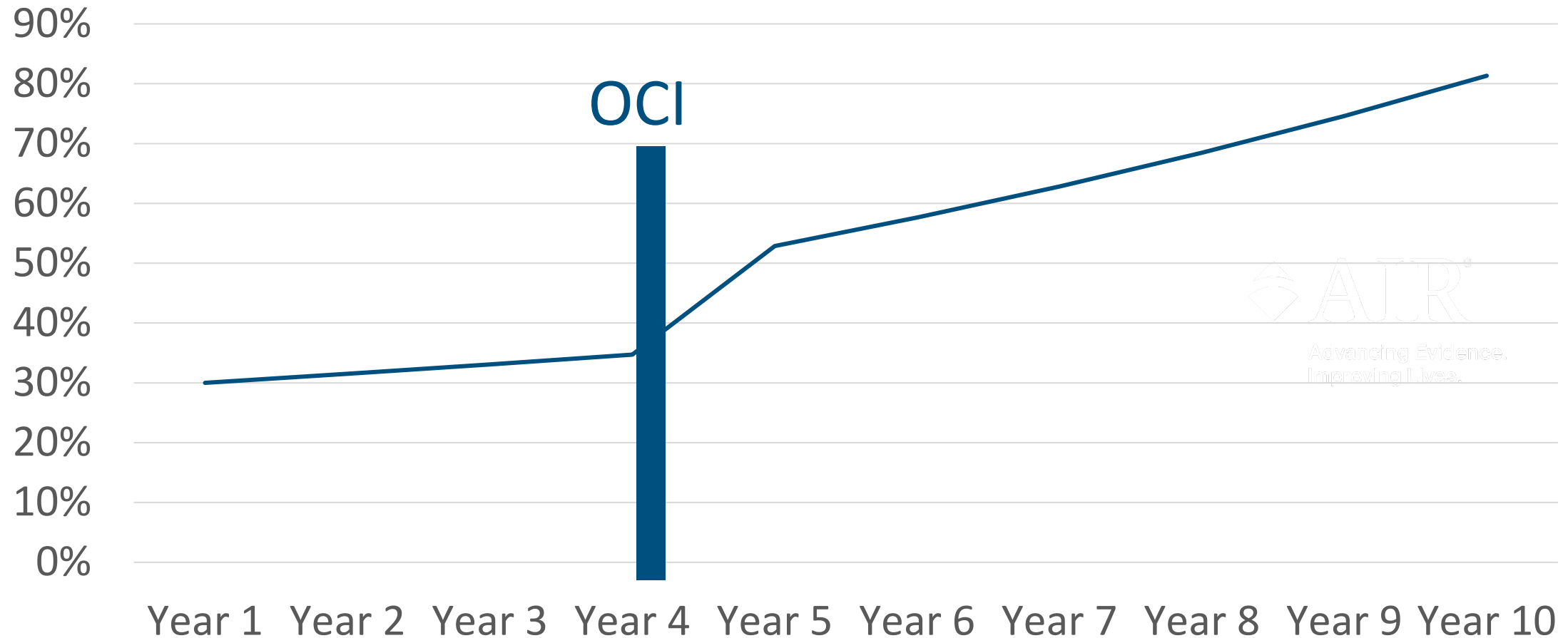
Exhibit 3. Administrative Data Sources for Child, Youth, and Family Outcomes

| Indicators                                                                                                                                                                                           | Possible data sources                                                                                                        |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| 5-year-olds in different arrangements: unsubsidized, full time, full year/part year, care, proximity of care                                                                                         | Resource and referral agency data, OUSD enrollment data, Head Start enrollment data, census data                             |
| children in various groups receiving high-quality ECE services, children with disabilities, children experiencing homelessness, children in the foster care system, children with language learners) | Resource and referral agency data, OUSD enrollment data, Head Start enrollment data, census data                             |
| care of children in settings with high Quality Counts ratings, highly qualified staff members, and/or high observed quality ratings                                                                  | Quality Counts ratings<br>OUSD CLASS scores<br>Data about workforce qualifications, tenure, professional development         |
| Child assessments in state preschool programs, Head Start programs, TK classrooms, and kindergarten                                                                                                  | OUSD EDI data, ASQ or TS Gold data from OUSD preschool programs and Head Start centers                                       |
| Grade 3 test scores, Grade 8 test scores, course-taking patterns (including AP), SAT test-taking rates, graduation rates                                                                             | OUSD and charter school records                                                                                              |
| Number of students participating in mentoring or advising programs and other services to support college transitions                                                                                 | Oakland Promise and OUSD records                                                                                             |
| Enrollment, persistence, and completion of 2- and 4-year college programs                                                                                                                            | OUSD records, National Student Clearinghouse data                                                                            |
| Receipt of scholarships, Pell grants, student loans, and other financial aid; remaining out-of-pocket expenses for students                                                                          | Oakland Promise records and data from OUSD and from receiving colleges and universities; National Student Clearinghouse data |

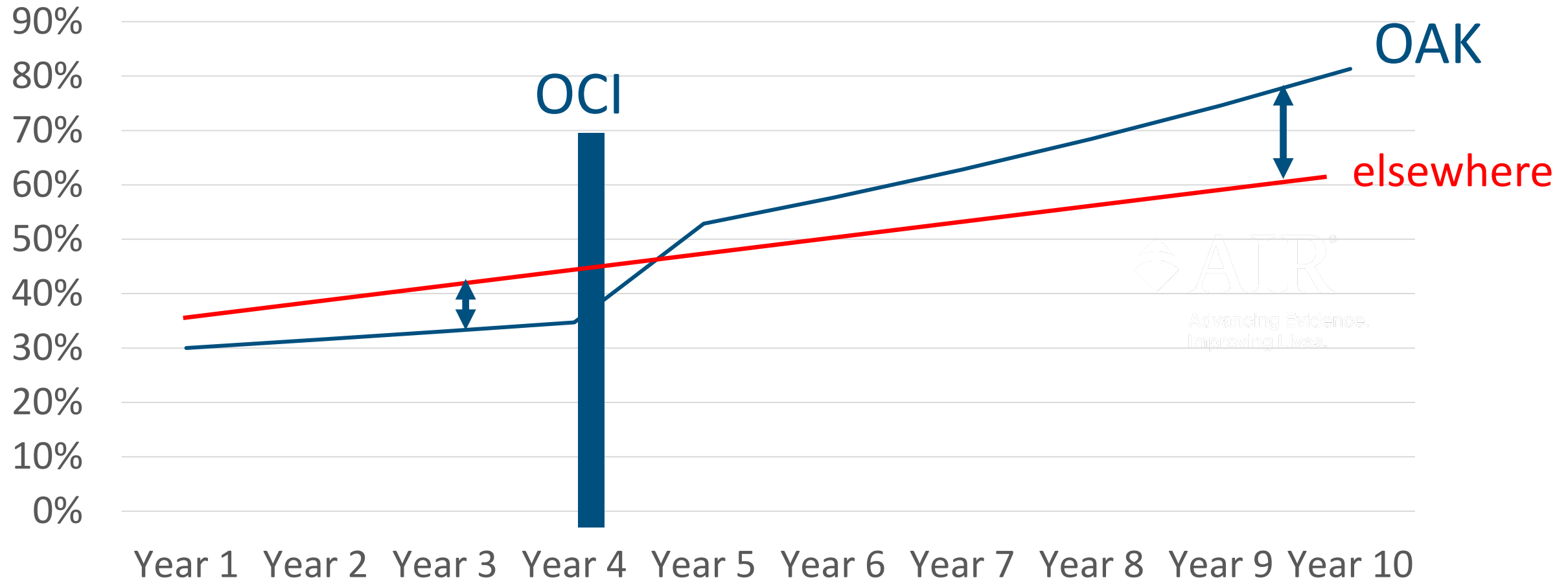
Exhibit 2. Administrative Data Sources for Analyzing System-Level Impacts of OCI Funding

| Indicators                                                                       | Possible data sources                                                                                                              |
|----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Wait times, size of waiting lists, waiting time, out-of-pocket costs for parents | Resource and referral agency data, OUSD enrollment data, Head Start enrollment data                                                |
| Qualifications, student educational                                              | Resource and referral agency data, OUSD staffing data, Head Start staffing data, Quality Counts data                               |
| Financial                                                                        | Brilliant Baby and K2C program records                                                                                             |
|                                                                                  | OUSD staffing data, possible future Oakland Promise RBA measure                                                                    |
|                                                                                  | Service records from Oakland Promise and its subcontractors, OUSD and community college data on student enrollment and service use |
|                                                                                  | Oakland Promise records and data from receiving universities; National Student Clearinghouse data                                  |

# Analytical Framework: Interrupted Time Series Design

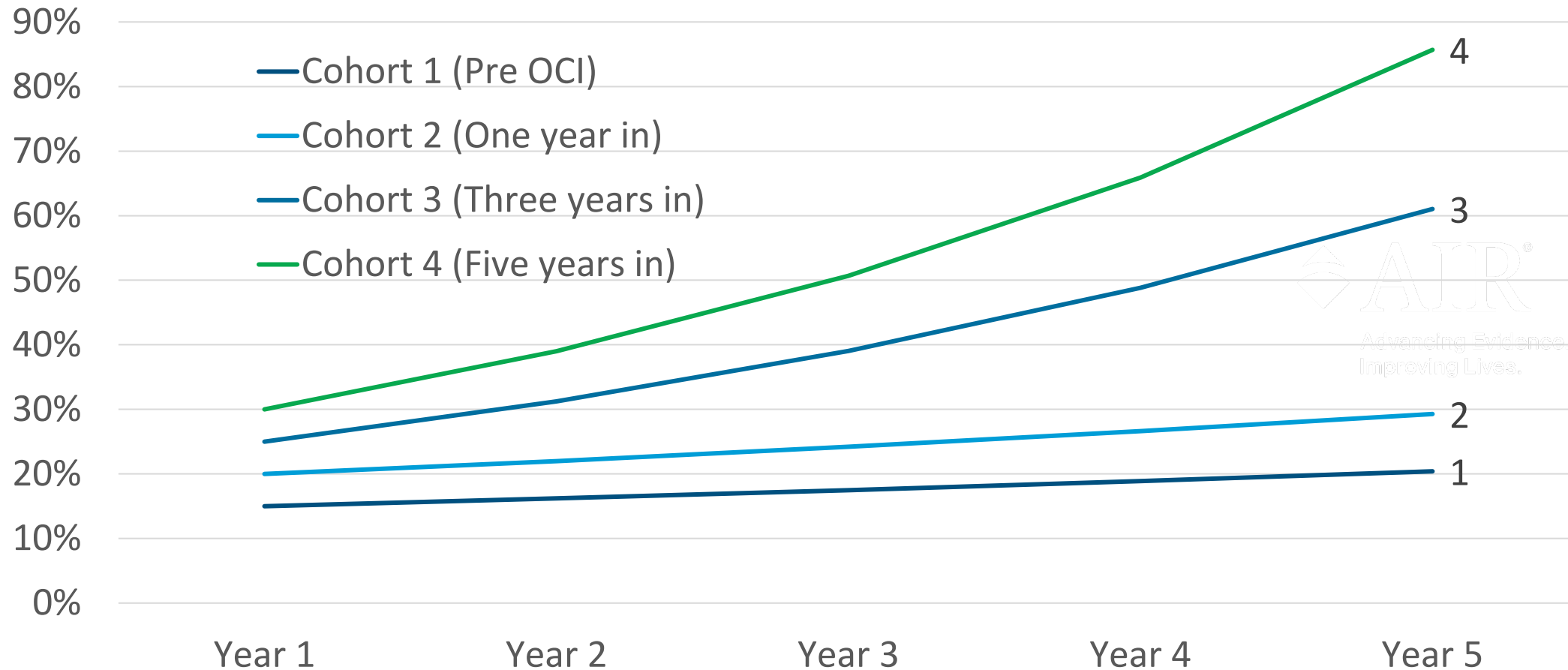


# Analytical framework: Difference in Differences Design





# Analytical Framework: Cohort Comparison Design



# More Time is Better

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- It allows you to better control for changes in the environment (e.g., the pandemic, changes in state and federal policy & finances)
- It helps you capture the effects of delayed interventions (e.g., a program that takes a while to set up; capital improvements)
- It helps you capture treatment effects that emerge over time (e.g., the cumulative effect of several years of tutoring)
- Because OCI is a multi-year initiative, an OCI impact evaluation calls for a multi-year data collection and impact evaluation strategy



# Remaining Decisions and Opportunities

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- How does a long-term impact evaluation fit into the OCI ordinance's two-year evaluation requirements?
- How can we minimize the cost and burden of survey data collection from families and service providers/partners?
- How can data collection for the OCI impact evaluation directly benefit partners and the community?
- What are potential opportunities for collaboration with other agencies and partners?



# Thank you!

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## MEMORANDUM

**TO:** Children's Initiative Oversight Commission

**FROM:** Jennifer Cabán  
Accountability Officer

**SUBJECT:** Accountability Officer Report

**DATE:** June 25, 2026

### CIOC June 2026 Meeting

This informational memo for June 2026 provides the Oakland Children's Initiative Oversight Commission (CIOC) with pertinent, real-time information.

#### OAKLAND CHILDREN'S INITIATIVE – ADMINISTRATIVE OVERVIEW

#### **OAKLAND CHILDREN'S INITIATIVE – ADMINISTRATIVE OVERVIEW**

#### **Calendar Year Update | June 2026**

The Oakland Children's Initiative (OCI) is completing its third full year of implementation (FY 2025–26). Over the past several years, significant effort has gone into establishing the Initiative's operations and ensuring that resources reach community partners, families, and the programs outlined in the City Charter. As this work continues to mature, we remain intentional in strengthening the infrastructure, partnerships, and systems necessary to support this innovative, long-term investment in Oakland's children, youth, and families.

While much of this work focuses on governance, planning, and operational infrastructure, these efforts are foundational to ensuring that public investments translate into meaningful outcomes for children, youth, and families. By building strong systems today, we are creating the conditions necessary to advance opportunity, accountability, and impact for Oakland over the next three decades.

#### **Focus Areas for FY 2026–27**

#### **Key priorities for the coming fiscal year include:**

- Finalizing the **OCI Operating Principles Manual**
- Establishing a shared **collective North Star** to guide the Initiative's long-term vision
- Developing the **next iteration of the 5-Year Guidelines**
- Expanding **strategic planning and communications efforts**
- **Developing Equity Rubric** in partnership with the Department of Race & Equity

This Administrative Overview is designed to provide insight into the Office's day-to-day work and the ongoing implementation of the Initiative. Below is the first formal update of the year. We welcome feedback on how these updates can continue to evolve to best serve Commissioners, partners, and the broader Oakland community.

**GENERAL UPDATES**

**CIOC May Retreat** - Commissioners convened on May 2, 2026, at Chabot Space & Science Center for a strategic retreat focused on strengthening shared understanding, governance, and long-term planning for the Initiative.

***Key discussion areas included:***

- OCI Context & Foundation – A review of the Initiative's structure, implementation progress, and evaluation efforts.
- Systems 101: Building Shared Language – An early childhood education overview facilitated by Commissioner Kym Johnson.
- What We're Learning – A revisit of key findings from the AIR Process Study.
- Roles & Governance – Clarifying responsibilities and establishing shared expectations.
- Strategy: Next 5-Year Guidelines – Exploring future priorities through a race and equity lens.
- Public Accountability & Communications – Outlining a shared approach to transparency, engagement, and communications.

All retreat materials were distributed to Commissioners following the meeting. Remaining follow-up items include finalizing the FY 2026–27 Commission workplan and timeline.

**Oakland Promise Awards Ceremony** - This spring, 1,600 Oakland students received scholarships to pursue their postsecondary goals. Of the \$6.4 million awarded through Oakland Promise, \$5.1 million was funded by the Oakland Children's Initiative.

Since launching in 2023, OCI has invested more than \$13 million in scholarships to support Oakland public school students on their pathways to college and career. On behalf of the City, I had the privilege of offering brief remarks to students and their families as they celebrated this important milestone.

**OCI Staffing Updates** - We are pleased to welcome Marriah Segura, who joined OCI as Program Analyst II on May 11, 2026. Marriah brings experience across the educational continuum, including program management, partnership development, youth development, college access advising, and career readiness. Throughout her career, she has supported students and families across the Bay Area through organizations such as Black Girls Code, Mills College, and First Graduate. She holds a Master of Arts in Educational Leadership from Mills College and studied Communication at George Mason University. As an Oakland resident, Marriah brings both professional expertise and a personal commitment to Measure AA's goals and the opportunities it creates for Oakland's children, youth, and families.

We are also reassessing our recruitment strategy for the Management Assistant position. While the process has taken longer than anticipated, we are focused on identifying the right candidate and structure to support the continued growth of the Initiative. Expanding the team thoughtfully will strengthen OCI's operational, fiscal, and analytical capacity during a critical phase of implementation.

**Looking Ahead to FY 2027** - The next six months will be an important period for the Oakland Children's Initiative. Upcoming discussions will include FY 2027 strategy and investments, annual

## **Children's Initiative Oversight Commission**

Subject: Accountability Officer Status Update

Date: June 25, 2026

Page 3

Results-Based Accountability (RBA) reporting, development of the next 5-Year Guidelines, and consideration of future Implementation Partner renewals.

These efforts will require thoughtful engagement, collaboration, and intentional discussion among Commissioners, partners, and stakeholders as we continue to build the long-term infrastructure necessary to achieve our shared goals.

The Commission will also experience several CIOC transitions in the coming months. Three Commissioners will complete their terms, and one Commissioner will be stepping down from service. The Mayor's Office is actively working to advance new appointments to ensure continued leadership, representation, and stewardship of the Initiative.

### **Events**

|             |                                                                                                                                        |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Wed, 5/6    | OFCY Planning & Oversight Cmte<br>Measure C Community Advisory Council                                                                 |
| Thurs, 5/7  | Tandem, Partners in Early Learning - Building on Books Celebration                                                                     |
| Fri, 5/8    | Youth Ventures JPA & Oakland Thrives Leadership                                                                                        |
| Mon, 5/11   | EdTrust West ECE Data Workgroup Monthly Meeting                                                                                        |
| Tues, 5/12  | NCCPC Policy Cmte                                                                                                                      |
| Thurs, 5/14 | CSAC All In and Ready Webinar Series<br>MSYEP Business Mixer<br>Oakland Promise Awards Ceremony                                        |
| Fri, 5/15   | CAO Race & Equity Team                                                                                                                 |
| Tues, 5/19  | YouthBeat Spring Student Showcase<br>NCCPC Policy Cmte                                                                                 |
| Wed, 5/20   | Planning Council – Public Policy Cmte<br>Mayor Lee's - One Year Anniversary<br>Bay Area Regional Catalyst Steering Cmte                |
| Thurs, 5/21 | Alameda County Pre-to-5 Collaborative<br>CARE Collaborative Core Team                                                                  |
| Tues, 5/26  | CAO Race & Equity Team                                                                                                                 |
| Wed, 5/27   | StriveTogether - The Cradle-to-Career Outcomes: Pathways to Career/Employment                                                          |
| Thurs, 5/28 | Planning Council - Quality Advisory Work Group                                                                                         |
| Thurs, 6/11 | CSAC All In and Ready Webinar Series<br>City Pride Flag Raising Event at City Hall                                                     |
| Mon, 6/15   | Funding ECE at Scale: Using Cost and Financing Studies to Design Stronger Early Childhood Systems<br>2026 State of ALICE Public Launch |
| Tues, 6/23  | The Children's Partnership - Creating Safe ECE Spaces Under AB 495: What Providers Need to Know                                        |
| Wed, 6/24   | CARE Collaborative Monthly Meeting<br>IP Collaborative Meeting                                                                         |
| Thurs, 6/25 | First 5 Alameda County Commission Meeting                                                                                              |

### **Standard Monthly Meetings**

- Alameda County ECE Local Planning Council – Steering and Other Cmtes including Public Policy

## Children's Initiative Oversight Commission

Subject: Accountability Officer Status Update

Date: June 25, 2026

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- Oakland Starting Smart & Strong (OSSS) Lead Planning Team
- EdTrust West – Data for the People Cmtes
- CARE Collaborative
- Northern California College Promise Coalition
- Alameda County Pre-to-5 Collaborative
- CA CSA Coalition bi-monthly meeting
- Alameda County Early Childhood Policy Committee (ACECPC) (bi-monthly)
- Citywide Community Engagement Working Group (weekly)
- First 5 Alameda County Commission & CAC (bi-monthly)
- City of Oakland Director's Meetings (bi-weekly)
- City of Oakland Fiscal Management Meeting

In Community,



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**Jennifer Cabán**

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



# How OCI Funds Are Used: Early Data on the Economic Impact of the Oakland Children's Initiative

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JUNE 2026



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## Abbreviations Key

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### A–C

**ADA** — Americans with Disabilities Act

**AIR** — American Institutes for Research

**BB** — Brilliant Baby

**CalKIDS** — California Kids Investment and Development Savings Program

**CDC** — Child Development Center

**COI** — Child Opportunity Index

**COOECFS** — City of Oakland Early Childhood and Family Services

**COOHS** — City of Oakland Head Start (now City of Oakland Early Childhood and Family Services)

**CSA** — College Savings Account

**CSPP** — California State Preschool Program

### E–I

**ECE** — Early Childhood Education

**EIS** — Economic Impact Study

**FY** — Fiscal Year

**GDP** — Gross Domestic Product

**IP** — Implementation Partner

**K2C** — Kindergarten to College

### M–O

**MTSS** — Multi-Tiered System of Supports

**NPS** — Nonpublic School (in the OUSD site list)

**OCI** — Oakland Children’s Initiative

**OP** — Oakland Promise

**OUSD** — Oakland Unified School District

### P–R

**PD** — Professional Development

**RBA** — Results-Based Accountability

### S–Z

**TK** — Transitional Kindergarten

## Executive Summary

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The Oakland Children’s Initiative (OCI, or the “Initiative”), established by Measure AA in 2018, is a 30-year investment designed to expand access to high-quality early childhood education (ECE) and promote postsecondary education completion for Oakland’s children and youth, with a focus on families experiencing the greatest need. Funded by an annual parcel tax, OCI was projected to raise approximately \$30 million each year, supporting a continuum of educational services from birth through college. The City Charter established 5-year guidelines that provide requirements specific to each of the two funds in the Initiative—the Early Education Fund and the Oakland Promise Fund (referred to as the College Access Fund in this report)—and that directly inform investments.

The City of Oakland engaged the American Institutes for Research® (AIR®) and its partner RDA Consulting to conduct a 2-year evaluation of OCI, mandated by the Initiative’s ordinance. The evaluation includes three components: (1) a process study to examine OCI implementation, (2) an economic impact study (EIS) to measure the impact of OCI on the fiscal health and spending decisions of the OCI IPs and the larger service environment, and (3) the design of a longitudinal OCI impact study. This report summarizes the first year of findings of the EIS, focusing on fiscal year (FY) 2024—the fiscal year that begins July 1, 2023, and ends June 30, 2024.

Exploring how OCI funds are being used can shed light on how these expenditures map onto the OCI goals and whether funds are invested in pathways likely to affect child outcomes of interest. Documentation of these investments is an important component of a comprehensive impact evaluation. To connect future changes in important outcomes to OCI, one first has to “follow the money.” Because some of the OCI goals aim to affect child outcomes over the life span, impacts on these outcomes may not be seen for years. In the interim, there is a need to understand whether current investments are made in ways that are likely to advance the long-term goals of OCI. The goal of this report, then, is to document investment patterns, understand how they fit into the existing service and funding infrastructure, and predict their longer-term economic impacts.

The EIS aims to answer two primary research questions:

1. How is OCI funding being used?
2. What is OCI’s broader economic impact?

## About the Oakland Children's Initiative

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OCI is implemented through two required Implementation Partners (IPs), selected through an authorized City approval process, who collaborate with a broader ecosystem of service providers. Acting as fund managers on behalf of the City of Oakland, the IPs implement OCI investments, either directly or through subcontracts. This structure is designed to support timely and streamlined distribution of funds while maintaining alignment with the City's oversight and accountability framework.

**First 5 Alameda County** is the selected IP of the OCI Early Education Fund, which represents approximately two thirds of OCI funding. First 5 Alameda County is a public agency working to ensure that every child—regardless of race, income, or neighborhood—has a strong start in life. First 5 focuses on aligning public funding, partners, and data to build an integrated, equity-centered early childhood system that supports the whole child, whole family, and whole community. Together with its partners, First 5 is working to move beyond fragmented early childhood services toward a coordinated system so that every child enters kindergarten ready to learn and thrives beyond.

The Early Education Fund includes a requirement to prioritize partnerships with two designated Priority Partners within the Initiative: Oakland Unified School District (OUSD) and City of Oakland Early Childhood and Family Services (COOECFS).<sup>1</sup> The Early Education Fund focuses on increasing access to quality preschool services for 3- and 4-year-old children from families with low incomes.

**Oakland Promise (OP)** serves as the IP for OCI's College Access Fund, which represents approximately one third of the OCI funding. OP's mission is to advance equity and economic mobility for Oakland students by supporting their successful completion of postsecondary education. As the College Access Fund IP, OP delivers selected direct services and is building and coordinating a college access infrastructure in Oakland. The College Access Fund prioritizes support for public school students from low-income backgrounds and/or are traditionally under-represented in college. The City of Oakland requires that at least 25% of OP's OCI funds be subcontracted to small and/or local businesses, strengthening both educational opportunity and Oakland's local economy.

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<sup>1</sup> Formerly known as the City of Oakland Head Start.

## Methods

To conduct the study, the evaluation team reviewed program plans, invoice records, and other fund-related documentation from OCI IPs. We analyzed Priority Partner expenditures from the early childhood fund by categorizing them into two groups: (a) investments that contribute to improving **access** to services and (b) those increasing the **quality** of services. We analyzed IP expenditures for the college access fund by categorizing them along **developmental stages**, following the cradle-to-career continuum, and separating them into direct **financial supports** and **programming**. These categories also support future impact and cost-effectiveness evaluations of OCI.

## Key Findings

The following section highlights key findings from the economic impact study, beginning with findings regarding the OCI Early Education Fund, followed by findings on the OCI College Access Fund.

### *Early Education Fund*

OCI is intended to address significant gaps in access to high-quality ECE in Oakland, with a priority focus on 3- and 4-year-old children from families with low incomes. Despite clear benefits for children's development and family economic stability, the local ECE system historically has been underfunded, fragmented, and unable to meet demand. OCI partner strategies include efforts to increase access to ECE, improve the quality of ECE programs, bolster supportive services available to children in ECE classrooms, strengthen professional development (PD) for early educators, address long-standing ECE facility needs, and promote preschool inclusion, among other activities.

- **In FY 2024, OCI invested a total of \$14,181,783 in the Early Education fund, which includes the work of First 5 Alameda County and its Priority Partners.** To put this figure into context, Oakland receives funding for early education from other sources at the city, county, state, and federal levels, which in FY 2024 included sources such as a city-level General Fund<sup>2</sup> and federal funding from Head Start, State Title V child development programs; state child care subsidies through the Alternative Payment Program and other support from the Child Care and Development Fund; and other private and philanthropic grants. These OCI investments in the Early Education Fund are an important addition to that funding landscape. OCI investments in First 5 Alameda County for planning, partnership development, monitoring, and accountability totaled \$3,638,784 in FY 2024, which included

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<sup>2</sup> The General Fund provides funding for some early childhood services, including Head Start and Early Head Start programs, which are required to provide a non-federal match equal to at least 20% of total program cost.



work to set up systems, personnel, procedures, and policies to effectively roll out and support implementation of OCI.

- **In FY 2024, OCI supported wide-ranging efforts to improve the quality of and access to OUSD and COOECFS early learning services.** In FY 2024, OCI invested more than \$8 million in OUSD early learning programs, and nearly \$2.5 million in COOECFS. OCI investments in OUSD early learning in FY 2024 had a comparable emphasis on increasing children’s access to services (43%) and improving the quality of services (57%). Similarly, in FY 2024, 38% of OCI funds for COOECFS funded resources to promote access, including supporting teacher salaries, while 62% went toward resources to enhance the quality of early learning services.
- **The majority of OCI investments in OUSD early learning in FY 2024 supported capital improvements to ensure that early education environments are safe and developmentally appropriate for 3 and 4-year-old children.** These improvements included general facility upgrades and making facilities compliant with the Americans with Disabilities Act (ADA), which will benefit multiple cohorts of children over time.<sup>3</sup> Recognizing that these capital investments will benefit future cohorts of children for multiple years, we also calculated annualized investments (capturing the value of these resources that will be used over a 12-month period) by amortizing capital investments over 25 years. When annualized, operating expenses (primarily direct services and PD) accounted for 91% of the investments.
- **OCI has provided a significant “value add” to existing funding for OUSD early learning services.** In FY 2024, OCI funds provided a significant boost to base funding for OUSD prekindergarten (PreK) and Transitional Kindergarten (TK) classrooms, increasing per-child per-day resources by 15.8% and 16.6%, respectively, above the program’s core state funding.
- **OCI preserved services at three COOECFS Head Start sites that were at risk of closure.** COOECFS offers both Head Start and Early Head Start, serving children from birth to age 5. Head Start serves children from families with incomes below poverty guidelines, children from families experiencing homelessness, and foster children. In FY 2021, the federal government awarded COOECFS a new 5-year grant (FY 2021–FY 2026) for approximately \$12.5 million to serve 622 children and their families. This award was nearly \$5 million less than the previous grant award, resulting in the elimination of Head Start funding for three COOECFS sites serving East Oakland: Franklin, Tassafaronga, and Arroyo Viejo. In December 2021, the City of Oakland approved the use of approximately \$1.8 million from the city’s General Purpose Fund to preserve services at these three sites. As of 2023, retroactively, OCI preserved funding to support COOECFS in maintaining Head Start services for families

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<sup>3</sup> Our estimates assume capital investments will have benefits lasting 25 years. These capital investments were made at ten OUSD sites. Based on enrollment figures for FY 2024, and assuming stable enrollment over time, we estimate these investments will benefit at least 374 children per year over 25 years, for a total of at least 9,350 children.

served at these three sites. OCI ensured continuity of the full range of Head Start services and supported ongoing programming without disrupting enrolled children and families. In addition, the funding strengthened COOECFS more broadly by enhancing personnel capacity, parent engagement, and PD supports.

- **FY 2024 OCI investments were concentrated in Oakland neighborhoods with the lowest levels of educational opportunity.** More than 70% of OUSD early childhood sites and OCI-supported COOECFS Head Start sites that received OCI funds in FY 2024 are located in areas of low or very low opportunity in Oakland, as measured by the Child Opportunity Index (Diversity Data Kids, 2025). Most of the populations in these areas historically have been disenfranchised; resources from OCI investments served populations that are more than 20% Black or African American and more than 40% Latino or Hispanic.<sup>4</sup>

### ***College Access Fund***

OP is the IP of the College Access Fund, the college access supports and persistence component of the Initiative. OP's mission is to advance equity and economic mobility for Oakland students by supporting their successful completion of postsecondary education. As the College Access Fund IP, OP provides selected direct services and subcontracts with community-based organizations to deliver a comprehensive range of supports. In this coordinated model, OP aligns strategy, manages investments, and works closely with partners to expand college access, affordability, persistence, and completion for Oakland students.

The Fund invests in college access and success across the cradle-to-career continuum, including supports and services provided in early childhood, elementary and middle school, high school, and college. OP organizes its work into four general program areas that align with this developmental continuum: Brilliant Baby, Kindergarten to College (K2C), College Access, and College Completion. OCI-funded OP subcontractors also span this developmental continuum, providing supports to children—and their families—from early childhood through college completion.

- **OCI significantly expanded the scope and depth of college access and success services offered by OP directly and in partnership with its OCI-funded subcontractors.** These services focus on children, youth, and families with low incomes, from underserved communities, and facing systemic barriers to opportunities. In FY 2024, OCI invested \$10.6 million in OP and its OCI-funded subcontractors, with 42% directed to college access and affordability, 34% to college success, and 8% to research and evaluation. In the same

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<sup>4</sup> There are several indicators that measure neighborhood opportunity, including the [Oakland Equity Indicators](#) and the [California Strong Start Index](#). We use the nationally normed metric in the Child Opportunity Index to allow comparability across other place-based initiatives.

fiscal year, direct financial support (scholarships, savings accounts) totaled \$3.5 million, primarily benefiting students entering college programs.

- **OP has used OCI funds to focus on children and families with the greatest need.** The College Access Fund supports students and families furthest from opportunity, including those with low incomes and from underserved communities. OP collected detailed geographic data on participants in two OP programs (Brilliant Baby and K2C), showing that these programs serve children in Oakland’s highest-need areas. Combined, the largest investments are concentrated in areas with low or very low educational opportunity, serving participant populations that are more than 20% Black or African American and more than 40% Latino or Hispanic.

### ***Predicted Economic Impact of OCI***

- **The Initiative’s projected economic impact may be significant, based on existing research.** Drawing on benefit-cost analyses in the research literature, OCI investments in the Early Education and College Access Funds are projected to yield substantial long-term benefits. Using RBA data from the OCI IPs and findings from published literature associated with similar investments, projected benefit-cost ratios range from 3 to more than 100, suggesting returns of \$3 to more than \$100 for every dollar invested. It is important to note that these are *projections*, not observed impacts; the Initiative’s economic impact remains unconfirmed, pending a formal study. This analysis is therefore conceptual, drawing on empirical research, meta-analyses of benefit-cost analyses, and OCI RBA data to model potential long-term effects.<sup>5</sup>

Overall, early evidence indicates that OCI is investing in efforts to reduce disparities in educational access and quality, particularly in underserved neighborhoods. By supporting both infrastructure and direct services across the developmental continuum from birth through postsecondary education, OCI is laying the groundwork for long-term educational and economic benefits for Oakland’s children, families, and communities. Because this is the first iteration of the economic impact study, this analysis focuses primarily on one year of fiscal data and includes a snapshot of abbreviated FY 2023 (January–June 2023) investments for additional context; future analyses may show different spending patterns. This report does not replace existing analyses conducted by the OCI Accountability Officer and her team for compliance and fiscal monitoring.

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<sup>5</sup> The estimates of predicted economic impact draw heavily on **existing empirical research, meta-analyses, economic theory, and RBA (results-based accountability) data** to estimate the likely long-term economic effects of OCI-funded activities. Because an impact evaluation has not yet been completed, the economic impact study relies on **predictive modeling** based on external literature rather than causal estimates specific to OCI. This external literature includes research on grant aid, persistence and college completion (including the economic value of college degrees and lifetime earnings), educational achievement, economic mobility and inequality, and costs and benefits of early investments.

## Introduction

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The Oakland Children’s Initiative (OCI, or “the Initiative”; Measure AA) is a 2018 charter amendment expanding and enhancing access to quality early childhood education (ECE) and promoting postsecondary education completion, prioritizing children, youth, and families with the highest needs. OCI is designed to reduce disparities in educational access and quality experienced by Oakland families with low incomes and those furthest from opportunity (see text box for additional details). The Initiative is projected to raise approximately \$30 million annually for 30 years through a voter-approved parcel tax.

Following initial legal challenges that delayed implementation, the City Council approved Implementation Partners (IPs) for the Initiative in late 2022, and funding was authorized in January 2023 retroactively.

The City of Oakland Charter outlines 5-year guidelines that identify requirements for each of the Initiative’s two funding streams—the Early Education Fund and the Oakland Promise Fund (referred to as the College Access Fund in this report)—and guide the funds’ strategic investments.

The City of Oakland contracted with the American Institutes for Research® (AIR®) and its partner RDA Consulting to conduct a 2-year evaluation of OCI, as required by the Measure AA ordinance. The evaluation includes three components: (1) a process study to examine OCI implementation, (2) an economic impact study (EIS) to measure OCI impact on the fiscal health and spending decisions of its IPs and the larger service environment, and (3) the design of a longitudinal OCI impact study. This report summarizes the first year of findings of the EIS, focusing on fiscal year (FY) 2024—the fiscal year that begins July 1, 2023, and ends June 30, 2024).

The [OCI Ordinance](#) details priorities for the two OCI funds. The Early Education Fund prioritizes 4-year-old children from families with low incomes and/or those who are in high need (followed by 3-year-old children in these groups). This fund is intended to increase overall attainment and reduce socio-economic and/or demographic disparities in educational outcomes. The College Access Fund prioritizes Oakland public school students and aims to reduce socio-economic and/or demographic disparities in educational outcomes, such as those related to wealth and income, from an early age. It prioritizes students from low-income backgrounds and/or those who are traditionally under-represented in college.

The Ordinance also describes the goals of the Early Education Fund and the College Access Fund.

## About the Oakland Children’s Initiative

OCI aims to advance equitable outcomes from early childhood through college completion. By investing in access to high-quality ECE and expanding college access and success, OCI works to increase educational, economic, and workforce opportunities for Oakland’s children, youth, and families.

The OCI framework recognizes that opportunity is built over time and that families are essential partners in that journey. The Initiative focuses on building a connected educational pathway by expanding access to quality preschool and early learning, strengthening family engagement and support, and advancing college enrollment, affordability, persistence, and graduation, helping children and youth thrive at every stage of their educational experience. OCI also invests in building a stable, qualified, and diverse workforce to support progress toward these goals.

Through sustained public investment and strong local partnerships, OCI is intended to align schools, community organizations, and service providers to ensure resources are leveraged, coordinated, culturally responsive, and grounded in community voice. This approach is designed to support lasting, equitable systems change over time, helping to create a future in which every child and family in Oakland has the opportunity to succeed and contribute to a thriving community.

OCI includes the **Early Education Fund** and the **College Access Fund**,<sup>6</sup> each managed by a designated IP that collaborates with a broader ecosystem of service providers. Both IPs are City-contracted entities responsible for managing and deploying OCI funds and supporting implementation of the Initiative's strategies in alignment with the voter-approved City Charter, OCI 5-Year Guidelines for the Initiative, and shared results-based accountability (RBA) measures. IPs are selected through an authorized city-administered approval process, including review by the Accountability Officer, the City Council, and the Children's Initiative Oversight Commission.

Acting as fund managers on behalf of the City of Oakland, IPs implement OCI investments directly and/or through subcontracts. This structure supports timely and streamlined distribution of funds while maintaining alignment with the City's oversight and accountability framework. IPs are responsible for administering program funds, managing subcontracted services, monitoring performance, and coordinating implementation in accordance with the Initiative's guidelines and strategic objectives supported by the OCI Accountability Officer.

### ***Early Education Fund***

OCI is intended to address significant gaps in access to high-quality ECE in Oakland, with a priority focus on 3- and 4-year-old children from families with low incomes. High-quality ECE provides an important foundation for young children's success in school and in life. Quality ECE programs have been shown to positively affect children's social-emotional development, language development, and academic skills (Amadon et al., 2022; Duncan et al., 2023; Yoshikawa et al., 2013). In addition to fostering children's growth and development, ECE

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<sup>6</sup> This fund is technically the Oakland Promise Fund in the OCI Ordinance. For the purposes of this report, we refer to this fund as the College Access Fund.

promotes families' economic well-being, making it possible for parents and caregivers to participate in the workforce (Gibbs et al., 2024; Morrissey, 2017).

Despite clear benefits for children's development and family economic stability, the local ECE system has been historically underfunded, fragmented, and unable to meet demand. The level of unmet need for ECE in Oakland and more broadly in Alameda County is significant, particularly for very young children. A 2021 Alameda County needs assessment found that there is a licensed space for fewer than one out of every 10 infants and nearly one licensed spot for every two preschool-age children (Alameda County Early Care and Education Planning Council, 2021). The shortage of early learning and care in Alameda County mirrors broader national trends, with a significant need across the country for affordable, high-quality programming (Gibbs & Peeks, 2026).

There are also racial disparities in terms of access to and enrollment in high quality ECE and kindergarten readiness. Black and Hispanic children are typically less likely to access high-quality programming (Friedman-Krauss & Barnett, 2020; Latham et al., 2020; McCormick et al., 2023), which is critical in supporting their development. Moreover, Black and Hispanic children and children from families with low incomes enter kindergarten less prepared, including lower math and reading skills, than their White peers and children from families with higher incomes (Friedman-Krauss et al., 2016; García, E., & Weiss, E., 2015; Herring et al., 2021; Wolf et al., 2017). Issues related to race/ethnicity, income, and access are linked: American Indian/Alaska Native, Black, and Latino young children are more likely to live in poverty than White and Asian children (Granja & Smith, 2023). Families living in poverty typically live in neighborhoods that are historically under-resourced and offer limited access to high-quality early learning programs (Annie E. Casey Foundation, 2026). Child care "deserts"<sup>7</sup> are most common in low-income, rural, and majority Hispanic/Latino communities (Center for American Progress, 2026).

**First 5 Alameda County** is the selected IP of the OCI Early Education Fund, which represents approximately two thirds of OCI funding. First 5 Alameda County is a public agency working to ensure every child—regardless of race, income, or neighborhood—has a strong start in life. First 5 focuses on aligning public funding, partners, and data to build an integrated, equity-centered early childhood system that supports the whole child, whole family, and whole community. Together with partners, First 5 is working to move beyond fragmented early childhood services toward a coordinated system so that every child enters kindergarten ready to learn and thrives beyond.

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<sup>7</sup> In its analysis, the Center for American Progress defines child care "deserts" as regions with limited licensed programs compared with the number of young children, with at least three children for every available licensed child care slot.



OCI requires First 5 Alameda to prioritize two public partners: Oakland Unified School District (OUSD) and the City of Oakland Early Childhood and Family Services (COOECFS) program<sup>8</sup>. OCI must be used to reach “capacity”<sup>9</sup> with OUSD and COOECFS before the Initiative invests in the broader early childhood mixed-delivery system.

OCI partner strategies include efforts to increase access to ECE, improve the quality of ECE programs, bolster supportive services available to children in ECE classrooms, strengthen professional development (PD) for early educators, and address long-standing ECE facility needs, among other activities.

### ***College Access Fund***

The Initiative is designed to address the critical need for greater college access, affordability, and higher college completion rates in Oakland. Latino and African-American students in Oakland attend college at lower rates than their counterparts who identify as Asian or White. In the 2022–2023 cohort of OUSD graduates, approximately 52% of Hispanic or Latino students and 60% of African-American students enrolled in college, compared with 71% of White students and 86% of Asian students. In addition, college completion rates are low: Only about one third (31%) of California Community College students graduate within 3 years (California Department of Education).

Once enrolled in a postsecondary program, students continue to face significant barriers, including the cost of college (Baldassare et al., 2025). In addition, factors such as academic preparedness and lacking a sense of belonging make it difficult for them to persist and graduate (see Kurlaender et al., 2019, for a review of the research literature). There are long-standing equity gaps in college completion across demographic groups. First-generation and low-income students face significant barriers to attendance and graduation and have lower rates of bachelor’s degree completion compared with their counterparts (Cahalan et al., 2024; Engle & Tinto, 2008; Kreniske et al., 2023).

Research has highlighted the benefits of attending and graduating from college, including long-term economic well-being. For example, in California, the median annual wage of workers with a bachelor’s degree is twice that of a high school graduate (\$96 thousand compared with

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<sup>8</sup> Formerly known as the City of Oakland Head Start.

<sup>9</sup> The Measure AA Ordinance indicates that “First 5 funding shall be given to public agencies to expand public programs in all areas of the City that meet a baseline quality level and can accommodate more children using empty classrooms and/or filling vacancies, particularly programs at OUSD and City of Oakland Head Start. This could include converting part-day OUSD preschool to full-day OUSD preschool at OUSD sites, hiring additional OUSD staff, or expanding the hours of service to better meet the needs of working families, subject to capacity limitations determined by OUSD and the City of Oakland Head Start in consultation with the Implementation Partner. After OUSD and Head Start sites have reached agreement with the Implementation Partner on ensuring funding to reach capacity as outlined above, the Early Education Fund may contract with private nonprofit agencies that show a commitment to and interest in serving low-income children.”

\$48 thousand). College graduates have lower rates of unemployment and of living in poverty compared with high school graduates (Mejia et al., 2026). In addition, college graduates experience greater success in the job market and are more likely to hold full-time jobs compared with those without a college degree (Public Policy Institute of California, 2019).

**Oakland Promise (OP)** serves as the IP for OCI’s College Access Fund, which prioritizes support for public school students from low-income backgrounds and/or traditionally under-represented in college. The College Access Fund receives approximately one third of the OCI funding. OP’s mission is to advance equity and economic mobility for Oakland students by supporting their successful completion of postsecondary education. As the College Access Fund IP, OP delivers selected direct services and is building and coordinating a college access infrastructure in Oakland that supports children beginning early in life. In this role, OP leads strategy, manages investments, and coordinates a network of more than 30 community-based organizations to expand cradle-to-career college access and completion for Oakland students. The City requires that at least 25% of OP’s OCI funds be subcontracted to small and/or local businesses, thereby strengthening both educational opportunity and Oakland’s local economy.

OCI partner strategies include college-bound identity programming, academic and social-emotional supports, financial literacy education and coaching, scholarships and college savings accounts, mentoring and peer support, and other services that help students enroll in, persist in, and complete postsecondary education.

### About the OCI Economic Impact Study

Exploring how OCI funds are being used can shed light on how these expenditures map onto the OCI goals and whether funds are invested in pathways likely to affect child outcomes of interest. Documentation of these investments is an important component of a comprehensive impact evaluation. To connect future changes in important outcomes to OCI, one first has to “follow the money.” Because some of the OCI goals aim to affect child outcomes over the life span, impacts on these outcomes may not be seen for years. In the interim, there is a need to understand whether current investments are made in ways that are likely to advance the long-term goals of OCI. The goal of this report, then, is to document investment patterns, understand how they fit into the existing service and funding infrastructure, and predict their longer-term economic impacts.

The OCI EIS aims to answer two primary research questions:

1. How is OCI funding being used?
3. What is OCI’s broader economic impact?



**Report Structure.** The primary goal of this analysis is to understand how OCI funds support its key activities and goals and to qualify those investments by the types of student outcomes they may promote or improve. We also examine geographic variation in investments and how those investments align with the City’s highest areas of need. The report concludes with a discussion of the estimated longer-term economic impact of OCI investments. The appendices include additional technical details and analysis: Appendix A includes a snapshot of financial investments in the abbreviated FY 2023 (January–June 2023), Appendix B provides details on our categorization methods for each IP, and Appendix C includes supplementary exhibits and analyses.

## Methods

To conduct the study, the evaluation team reviewed program plans, invoice records, and other documents from First 5 Alameda, OUSD, COOECFS, and OP; conducted cost interviews with key staff at the IP organizations; and obtained additional data as needed, including OUSD classroom and enrollment data and supplementary information on RBA measures (partner-reported metrics used to measure the progress of OCI IPs).

The evaluation team worked in consultation with the OCI Accountability Officer to identify meaningful categories for OCI investments associated with the goals of each fund. Using program documents and interview data, we categorized each expenditure line item in invoice records along these developed categories, which map onto goals and outcomes of OCI. This categorization of investments also sets the stage for future cost-effectiveness or cost-benefit analyses that can be paired with a rigorous impact study and preliminary work to estimate economic impact using literature.

The outcome categories used in this report are aligned with the goals outlined in the OCI Ordinance, but they do not always directly mirror how the IPs organize or define their OCI-supported work. To support consistent reporting and cost analysis across the Initiative, we identified a focused set of outcome categories that could be clearly mapped to OCI’s overarching goals.

At the same time, we recognize that the work of the IPs extends beyond these categories and includes broader systems-building efforts such as partnership development, cross-system coordination, data management and reporting, strategic planning, and collaborative decision making. Due to the limited availability of FY24 data, it was not feasible to comprehensively capture and allocate costs associated with these broader coordination and systems-change activities within this analysis. Future economic impact studies may further explore approaches to better reflect these components of the work.

In addition, it is important to note that because this is the first iteration of the OCI EIS, it focuses primarily on one year of fiscal data. Analyses with more data over future years may reveal different spending patterns. This report also does not replace existing analyses that the OCI Accountability Officer and the team are conducting to ensure compliance and fiscal monitoring.

**EIS Time Frame.** This EIS report focuses primarily on financial data from FY 2024. In the following sections, we present a detailed analysis for FY 2024. In addition, a snapshot of financial data from the first 6 months of the Initiative, January through June 2023 (the abbreviated FY 2023), is presented in Appendix A.

## Early Education Fund

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The OCI Early Education Fund, as described earlier, is intended to expand access to quality early learning, addressing a significant level of unmet need in Oakland. OCI requires First 5 Alameda to prioritize two public partners: Oakland Unified School District (OUSD) and the City of Oakland Early Childhood and Family Services (COOECFS) program. OCI must be used to reach capacity with OUSD and COOECFS before the Initiative invests in the broader early childhood mixed-delivery system.

The Early Education Fund aids First 5 Alameda County in serving as a financial intermediary for the fund, subcontracting with Priority Partners to implement the Initiative. In the sections that follow, we provide an analysis of the Early Education Fund, beginning with First 5 Alameda, followed by OUSD and COOECFS.

### First 5 Alameda County

In FY 2024, First 5 Alameda County used OCI funds to cover associated administrative costs including personnel costs, evaluation and consultation services (including legal support and early childhood systems design), and other general expenses. These expenditures support First 5 in managing and building the internal capacity to facilitate the implementation of the OCI Early Education Fund through its Priority Partners, OUSD and COOECFS. In OCI's first full fiscal year, these efforts included setting up systems, personnel, procedures, and policies to effectively roll out and support OCI. A summary of First 5's FY 2024 expenses are shown in Exhibit 1.

### Exhibit 1. First 5 Alameda County FY 2024 Expenses

| Expense Category                     | Total Expenses July 1, 2023–June 30, 2024 |
|--------------------------------------|-------------------------------------------|
| Personnel                            | \$1,195,881                               |
| Evaluation and Consultation Services | \$161,532                                 |
| Miscellaneous/Other                  | \$4,721                                   |
| Administrative Fee <sup>10</sup>     | \$2,276,650                               |
| <b>Total</b>                         | <b>\$3,638,784</b>                        |

Source: FY 2024 First 5 invoice data.

Exhibit 2 shows a summary of OCI Early Education Fund expenditures through First 5 Alameda and its Implementation Partners, OUSD and COOECFS.

### Exhibit 2. Summary of FY 24 OCI Early Education Fund Expenditures

| Organization           | FY 2024 Expenditures |
|------------------------|----------------------|
| First 5 Alameda County | \$3,638,784          |
| OUSD                   | \$8,095,644          |
| COOECFS                | \$2,447,355          |
| <b>Fund Total</b>      | <b>\$14,181,783</b>  |

Source: FY 2024 First 5 invoice data.

In the sections that follow, we describe how these OCI expenditures were invested in each of the two Priority Partners for the Early Education Fund, beginning with OUSD and followed by COOECFS.

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<sup>10</sup> Starting in FY 2024–FY 2025, First 5 Alameda County implemented a set administrative fee of 15% on non-capital expenditures to support staffing, administration, and systems-building efforts with OUSD, COOECFS, and other local partners.

## OUSD Early Learning Program

In this section, we focus on OUSD’s early learning program. We first summarize our approach to analyzing OUSD FY 2024 expenditures, then present the analysis results.

### Methods: Tracking FY 2024 OCI Investments Related to Access and Quality

To understand how OCI funds were used by OUSD to advance the goals of the OCI Early Education Fund, we categorized costs into two general categories: improving **access** to early learning services and improving the **quality** of these services—or, in a few cases, both.<sup>11</sup> We used these categorizations to show how investments correspond with the pathways through which the OCI Charter intends to influence child outcomes. Appendix B contains detailed definitions of the categories.

Broadly speaking, we considered an investment focused on “access” if it helped children access services—such as an OUSD family navigator who helps families enroll in OUSD PreK services. These resources increased OUSD program capacity and staffing to operate more classrooms and to stabilize programs. For example, the hiring of new family navigators, coaches, and aides, and the funding of facility and building upgrades (which ensure that environments are safe and developmentally appropriate for young children), enabled OUSD to maintain and expand services, thus supporting higher enrollment and expansion efforts of OUSD's early education programming.

These investments were accompanied by an increase in the number of subsidized early education slots available, thus enabling OUSD to serve more families and children. An investment was considered to be focused on “quality” if it related to children’s experiences once children were enrolled in PreK services—for example, upgraded classroom materials, including resources for children with special needs, teacher PD, or socio-emotional and behavioral support.

### OUSD: KEY FINDINGS

- In FY 2024, OCI made substantial investments in OUSD capital infrastructure, supporting early childhood facilities upgrades that will contribute to quality early education experiences for children for years. The majority of annualized investments were in labor costs, supporting staff who provide direct services.
- OCI investments within OUSD’s early childhood programs were largest in neighborhoods of lowest educational opportunity.
- OCI investments in OUSD early childhood programs added 16% to the base funding supporting these State Preschool and Transitional Kindergarten programs, enabling additional investment in access and quality in these programs.

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<sup>11</sup> When an invoice line item related to both access and quality, we proportioned the cost across the two categories appropriately, most often assuming a 50% allocation to access and 50% allocation to quality.

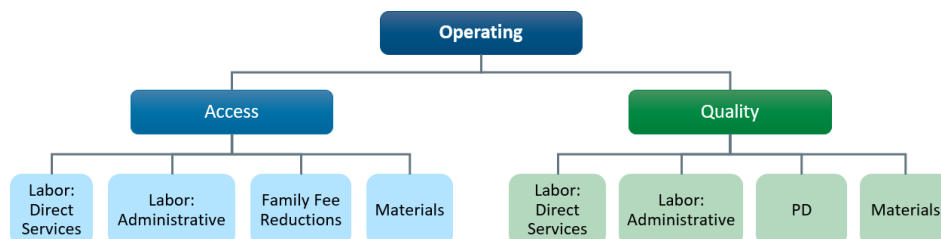
We then created **subcategories** to further describe how funds were used: (1) Labor: Direct Services, (2) Labor: Administrative, (3) Family Fee Reductions, (4) Materials, (5) Facilities, and (6) Professional Development. Appendix B provides detailed definitions of the categories and subcategories used in our analysis.

Next, we categorized investments into **capital** and **operating** investments, recognizing that some investments are physical assets that can be used over multiple years, while others are investments in resources required to run day-to-day activities. Here, capital investments refer to investments made to acquire, upgrade, or maintain physical assets, such as property, buildings, technology, or equipment. In FY 2024, OCI capital investments for OUSD early learning programs included primarily new and upgraded facilities. To refine our analysis, we also categorized capital investments as relating to access or quality.

It is important to note that the categories and terminology used in this study do not align precisely with how First 5 Alameda and its Priority Partner subcontractors organize and describe their work, which is complex and involves a range of strategies to support the early education system in Oakland. Internally, First 5 Alameda categorizes its expenditures into different categories that include system-building efforts and workforce supports, as well as quality and access. To address this study’s different but complementary purpose, we developed a coding scheme that aligns expenditures with the major goals of the OCI as they relate to potential impacts on long-term student outcomes and could be applied given the available fiscal information (e.g., we could confidently assign costs to outcome categories with information available in the expenditure files provided). We also note that the access/quality framework used in this report is not intended to overlook the significant system-building efforts in which partners are engaged; rather, it is intended to provide a simple classification system that is feasible to implement with the data available and aligns with the primary goals of OCI.

In FY 2024, OCI operating investments for OUSD included investments in salaries, materials, or other program supports, such as stipends/scholarships and PD. In addition to identifying operating investments, we categorized them as relating to access or quality, and within these categories, we applied more refined labels. Exhibit 3 shows these categorizations for operating investments.

### Exhibit 3. OUSD FY 2024 Operating OCI Investment Categories



Using these categorizations, we calculated *total annualized investments* by spreading specific expenditures over multiple years based on their expected useful life. Because large capital investments in facilities made in FY 2024 will benefit future cohorts of children across multiple years, we amortized these costs over 25 years to estimate an annualized investment for FY 2024.

Our **annualized investments** simply convert the total investments made in FY 2024 into a full-year (12-month) cost, recognizing that many of the investments made in that year will be used over a longer time frame. The annualized investments can be thought of as a “12-month equivalent” or a “full-year estimate,” capturing the value of the resources invested in in FY 2024 that will be used over a 12-month, or full-year, period.

It should be noted that an initiative such as OCI is likely to make similar capital investments—such as these facilities upgrades to ensure that children have access to safe, developmentally appropriate environments—at multiple time points throughout the 30-year initiative. Over time, these investments will accumulate in ways not fully captured by our annualized estimates. For example, additional facilities investments made at different points may create combined effects that simple amortization does not reflect.

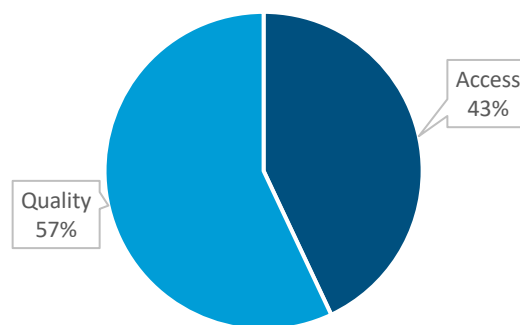
## EXAMPLES OF INVESTMENT CATEGORIZATIONS

- A Family Navigator, who works directly with families to enroll their children in OUSD early learning programs, is categorized as “Operating, Access, Labor, Direct Services.”
- An Early Learning Coach, who works directly with teachers to help improve the quality of PreK instruction, is classified as “Operating, Quality, Labor, Direct Services.”
- Marketing materials, such as flyers or website promotions to raise awareness about OUSD programs, are classified as “Operating, Access, Materials,” while materials that improve children’s learning experiences, such as educational books and toys, are classified as “Operating, Quality, Materials.”
- Investments in professional development designed to improve staff skills and enhance the quality of children’s experiences are classified as “Operating, Quality, Professional Development.”
- Facilities upgrades, such as ADA improvements, are classified as “Capital, Access, Facilities,” while Facilities upgrades aimed at improving children’s experiences, such as playground enhancements, are classified as “Capital, Quality, Facilities.”

## OUSD OCI Early Education Fund Investments in FY 2024

Using the methodology described above, AIR analyzed total investments and total annualized investments for OUSD’s early learning program. OCI’s total investments in early childhood resources for OUSD in FY 2024 were \$8,095,644. A little less than half of these investments (43%) supported resources to increase access to early learning services,<sup>12</sup> and a little more than half (57%) were focused on improving the quality of services.<sup>13</sup> Exhibit 4 shows the distribution of investments in access and quality for FY 2024.

**Exhibit 4. Percentage of OCI-Funded OUSD Investments in Access and Quality in FY 2024**



Source: FY 2024 OUSD invoice data.

More than half of FY 2024 OUSD investments (62%) were made in capital investments through facility upgrades, with a smaller proportion (38%) invested in operating expenditures such as labor, PD, and materials. These investments included major renovations at OUSD’s Kaiser Early Childhood Center, such as a new playground and ADA-compliant access

throughout the campus, to ensure that children with special needs have access to the site. In addition, 10% of OUSD sites received capital infrastructure investments in FY 2024 (City of Oakland, 2024). Other built environment investments included fences, painting, soil testing, lead paint testing, murals, and surveying (City of Oakland, 2023). Overall, 374 children aged 0–5 were enrolled in an improved early care and education facility in FY 2024, representing 18% of all children enrolled in these OUSD programs. These OCI facility investments are intended to ensure children have access to safe and developmentally appropriate environments.

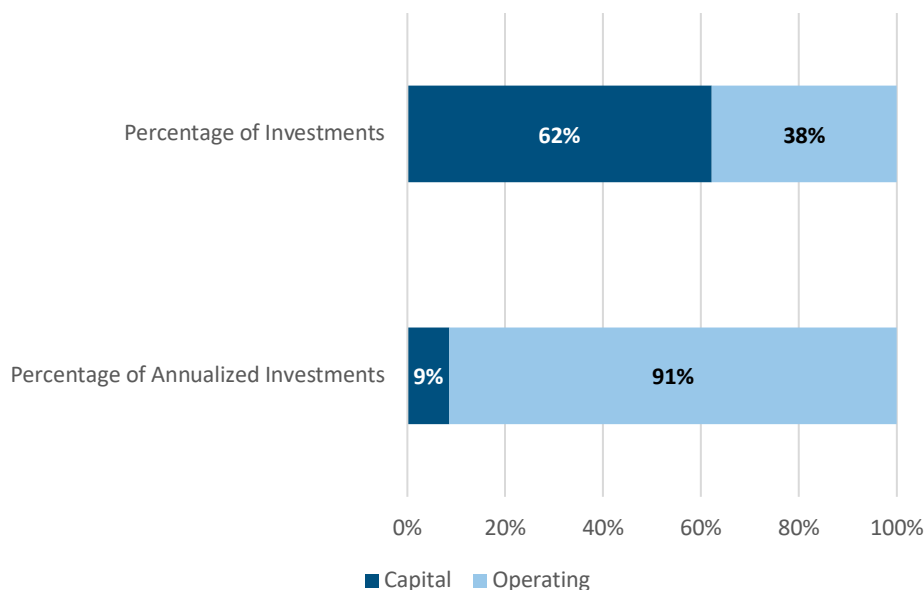
Notably, when we annualize these large capital investments and convert them into a 12-month equivalent value, capital investments account for a much smaller share (8.6%), while operating expenses constitute 91.4% of OUSD early learning investments, with the largest subcategory of expenses being Labor: Direct Services. When looking at annualized investments, we see that most of the FY 2024 OUSD OCI investments focused on improving the quality of OUSD’s early

<sup>12</sup> 12% in operating investments and 35% in capital investments.

<sup>13</sup> 26% in operating investments and 27% in capital investments.

learning program<sup>14</sup> compared with improving access.<sup>15</sup> Exhibit 5 shows a side-by-side comparison of how the percentage of investments differs when annualized versus not.

#### Exhibit 5. Comparison of Percentage of OUSD FY 2024 Investments in Capital and Operating Expenses



Source: FY 2024 OUSD invoice data.

Exhibit 6 shows a more detailed breakdown by Operating and Capital Investments and their distribution across Access and Quality and corresponding subcategories. The column labeled “Total annualized investments” captures a “12-month equivalent” or a “full-year estimate” of the “Total investments” column, estimating the value of the resources invested in FY 2024 that will be used over a 12-month, or full-year, period.

<sup>14</sup> Two-thirds (67%) of annualized investments were focused on improving quality: 63% in operating investments and 4% in capital investments.

<sup>15</sup> One third (33%) of annualized investments were focused on improving access: 29% in operating investments and 4% in capital investments.



## Exhibit 6. OUSD FY 2024 Total OCI Investments and Annualized Investments, by Category

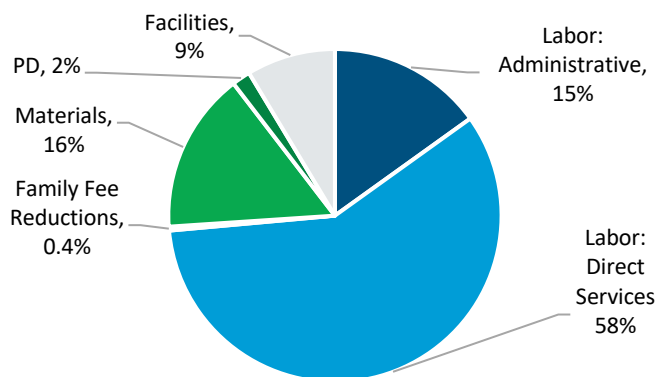
|                             | Total investments* | Percentage of total investments | Total annualized investments* | Percentage of annualized investments |
|-----------------------------|--------------------|---------------------------------|-------------------------------|--------------------------------------|
| <b>Operating</b>            |                    |                                 |                               |                                      |
| <b>Access</b>               |                    |                                 |                               |                                      |
| Labor: Administrative staff | \$241,383          | 3%                              | \$241,383                     | 7%                                   |
| Labor: Direct services      | \$696,525          | 9%                              | \$696,525                     | 21%                                  |
| Family fee reductions       | \$12,685           | 0.2%                            | \$12,685                      | 0.4%                                 |
| Materials                   | \$15,002           | 0.2%                            | \$15,002                      | 0.4%                                 |
| <b>TOTAL</b>                | <b>\$965,595</b>   | <b>12%</b>                      | <b>\$965,595</b>              | <b>28.8%</b>                         |
| <b>Quality</b>              |                    |                                 |                               |                                      |
| Labor: Administrative staff | \$264,464          | 3%                              | \$264,464                     | 7.9%                                 |
| Labor: Direct services      | \$1,262,615        | 16%                             | \$1,262,615                   | 37.7%                                |
| Professional development    | \$60,129           | 1%                              | \$60,129                      | 1.8%                                 |
| Materials                   | \$508,886          | 6%                              | \$508,886                     | 15.2%                                |
| <b>TOTAL</b>                | <b>\$2,096,094</b> | <b>26%</b>                      | <b>\$2,096,094</b>            | <b>62.6%</b>                         |
| <b>TOTAL OPERATING</b>      | <b>\$3,061,689</b> | <b>38%</b>                      | <b>\$3,061,689</b>            | <b>91.4%</b>                         |
| <b>Capital</b>              |                    |                                 |                               |                                      |
| <b>Access</b>               |                    |                                 |                               |                                      |
| Facilities                  | \$2,516,978        | 31%                             | \$144,545                     | 4.0%                                 |
| <b>Quality</b>              |                    |                                 |                               |                                      |
| Facilities                  | \$2,516,978        | 31%                             | \$144,545                     | 4.0%                                 |
| <b>TOTAL CAPITAL</b>        | <b>\$5,033,955</b> | <b>62%</b>                      | <b>\$289,089</b>              | <b>8.6%</b>                          |
| <b>TOTAL</b>                | <b>\$8,095,644</b> |                                 | <b>\$3,350,778</b>            |                                      |

\* Total expenses and annual costs include indirect costs of \$111,382, spread proportionately across categories.  
Source: FY 2024 OUSD invoice data.

When examining annualized investments by subcategory, we see that the largest proportion of investments went toward Labor: Direct Services (58%<sup>16</sup>) followed by Materials (16%) and Labor: Administrative (15%), showing high levels of investment in teachers and classroom supports experienced directly by children and families. Exhibit 7 shows the breakdown of annualized investments going to each subcategory (across both Quality and Access).

<sup>16</sup> A total of \$1,959,140: \$696,525 in investments in Access and \$1,262,615 in investments in Quality.

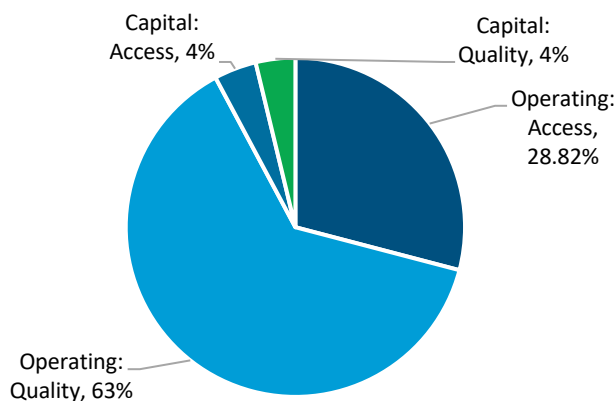
### Exhibit 7. Percentage of OUSD FY 2024 Annualized OCI Investments, by Subcategory



Source: FY 2024 OUSD invoice data.

When examining overall proportions of annualized investments going toward the larger categories of access and quality, we see that the largest proportion of investments went to operating investments in the quality of early learning services (63%). Exhibit 8 shows this breakdown of investments in access and quality by Capital and Operating Investments.

### Exhibit 8. Percentage of OUSD FY 2024 Annualized OCI Investments, by Broad Categories



Source: FY 2024 OUSD invoice data.

Fiscal year (FY) 2024 was a year of large capital investments in OUSD's early learning program, particularly in facility upgrades, which will provide more slots and a higher-quality ECE environment for enrolled children for many years. Investments in FY 2024 also included significant investments to improve direct services to children through additional supports. These included expanded Multi-Tiered System of Supports (MTSS) teams, who provide

academic, behavioral, and socio-emotional support to students based on need,<sup>17</sup> and expansion of the OUSD Family Navigator system, which helps families enroll in district early learning services and connect with other needed and desired community-based services. Investments included additional supports, such as more PD for early educators, home visiting programs to support families, and a Summer Bridge program to support refugee families and children at risk of homelessness. In tandem, these investments in direct services were designed to enhance the quality of OUSD's early learning services by providing children and families with targeted supports aimed at promoting family engagement and child development.

### **OCI Investments in FY 2024 to Promote Inclusion in OUSD**

OCI has bolstered the capacity of OUSD to serve children with special needs, which is particularly important given that parents/caregivers of children with special needs often struggle to find child care that responds to their needs (Sullivan et al, 2018). In addition to funding five new PreK special education classrooms, OCI has expanded the district's use of multi-tiered systems of supports (MTSS). The MTSS model includes screening, progress monitoring, multi-tiered prevention strategies, and data-driven decision making. MTSS teams are available to provide teachers, children, and their families with individualized supports to foster children's academic, behavioral, and social-emotional development. Children have access to needed resources such as behaviorists, speech therapists, and occupational therapists. Research indicates that the MTSS model has a positive impact on students' academic and social-emotional outcomes, including reducing behavioral issues (Nitz et al., 2023; Scott et al., 2019; Vetter et al., 2024). In addition, early detection of potential issues and alignment of instructional approaches to meet children's needs help reduce later challenges and improves kindergarten readiness (Carta & Greenwood, 2025). In addition to these investments, OCI investments supported ADA compliance in facilities as well as other physical upgrades to support preschool inclusion for children with special needs.

We also acknowledge that inclusion may be defined in various ways, including broader definitions that include resources that enable students with language or additional support needs and/or students experiencing homelessness to better access and engage with the learning environment. We know, for example, that OCI investments in FY 2024 supported resources for the Summer Bridge program, which serves refugee and McKinney Vento students.<sup>18</sup>

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<sup>17</sup> The MTSS model is organized into tiers (i.e., universal, targeted, intensive) to provide personalized supports to each student.

<sup>18</sup> The McKinney-Vento Homeless Assistance Act is federal legislation that ensures the educational rights and protections of children and youth experiencing homelessness. Local educational agencies, including public school districts, must ensure that students experiencing homelessness have access to the same free, appropriate public education, including public preschools, as provided to other children and youth. The legislation is intended to remove barriers to enrollment and participation in services.

For the purposes of the EIS, It was not feasible to estimate the level of OCI investments in preschool inclusion for children with special needs, given a lack of detail in the fiscal data available to the evaluation team. Future work may consider estimating OCI investments in resources promoting inclusion in ECE, data permitting. To do so, program plans and invoices would need to retain enough detail about specific activities supported by each line item resource to identify which investments support special education, and which support other broad definitions of inclusion, such as students with language or additional support needs, or students experiencing homelessness.

## **Geographic Variation in OUSD OCI Investments in FY 2024**

We also examined OCI investments in OUSD geographically and the extent to which these patterns aligned with community need. Many neighborhoods in Oakland are under-resourced, and children enrolled in OUSD early education programs are predominantly from historically disenfranchised populations. Among the students served, 22% are Black or African American, and 45% are Latino or Hispanic, with additional representation from other minority populations (First 5 FY 2024 Program Plan).<sup>19</sup>

We generated site-level estimates of OCI investments, and we used these to understand how OCI investments were serving these areas and populations. To generate these estimates, we used information that OUSD provided about which expenditures served different early childhood programs, including their PreK, TK, and Early Childhood Special Education Self-Contained Programs. We also obtained program- and site-specific data on the number of classrooms and enrollment. We then used these data to calculate the OCI investments by site overall, and for the PreK, TK, and Early Childhood Special Education Self-Contained Programs; OCI investments per child by site; and daily OCI investments per child by site. Exhibit A1 in Appendix A presents detailed estimates of the OCI annualized investments (i.e., converting investments into a 12-month equivalent of resources used over a one-year period) by site and per child by site.<sup>20</sup>

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<sup>19</sup> Students served in OUSD early education sites are 16% Asian, 22% Black or African American, 11% White, 45% Latino or Hispanic, 4% Multiple Ethnicities, 2% Unknown, 0.3% American Indian or Alaskan Native, and 0.2% Native Hawaiian or Other Pacific Islander.

<sup>20</sup> Site-level estimates are calculated by spreading line items evenly across benefiting sites. We conducted sensitivity analyses to explore other ways of calculating these estimates, such as weighting by the number of classrooms or by enrollment. We compared total OUSD expenditures calculated with and without classroom weights across the same five opportunity zones of the Child Opportunity Index using a Wilcoxon signed-rank test, a nonparametric paired test that does not assume normality of differences (Wilcoxon, 1945). The *p*-value was 0.5, indicating that there was no statistically significant difference between the two distributions. Specifically, the different weighting approaches resulted in estimated investments in low and very low opportunity zones that ranged from \$2.1 million to \$2.3 million and that ranged from \$1.1 million to \$1.3 million in higher-opportunity zones.

To examine how the OCI investments in OUSD align with community need, we used the Child Opportunity Index (COI) (Diversity Data Kids, 2025), a composite index of children’s neighborhood opportunity that contains data for every neighborhood (census tract) in the United States (Noelke et al., 2025). The COI defines “opportunity” as “the neighborhood conditions and resources that, per the research evidence, matter for early childhood development.” The COI comprises 44 indicators in three domains (education, health and environment, and social and economic).<sup>21</sup> The Initiative classifies each neighborhood as having very low, low, moderate, high, or very high levels of opportunity based on the indicators in each neighborhood in each of the three domains. We focused on the nationally normed<sup>22</sup> COI measure of opportunity by neighborhood based on the education domain, which includes indicators for early childhood, elementary, and postsecondary education.

Exhibit 9 displays a map of the City of Oakland with estimates of OCI annualized investments by site, juxtaposed with COI values by neighborhood. The dark orange areas represent neighborhoods with the lowest level of education opportunity, whereas the dark blue areas are those of highest opportunity. The black lines depict Oakland City Council districts. As shown in the exhibit, the majority of OUSD early childhood sites are in areas of low or very low opportunity for children. More than 70% of OUSD sites (36 out of 50 sites) are located in dark or light orange neighborhoods, areas of low or lowest educational opportunity. A more detailed description of annual site-level and daily per-child annualized investments for each OUSD site are included in Exhibit C1 in Appendix C.

The per-child annualized OCI investments across these sites in FY 2024 ranged from \$1 to \$76 per day; however, most investments ranged from \$5 to \$8 per day (interquartile range). Note that OUSD investments were distributed broadly across the city, with perhaps a modest tendency for larger annualized investments to be in sites in lower opportunity neighborhoods.

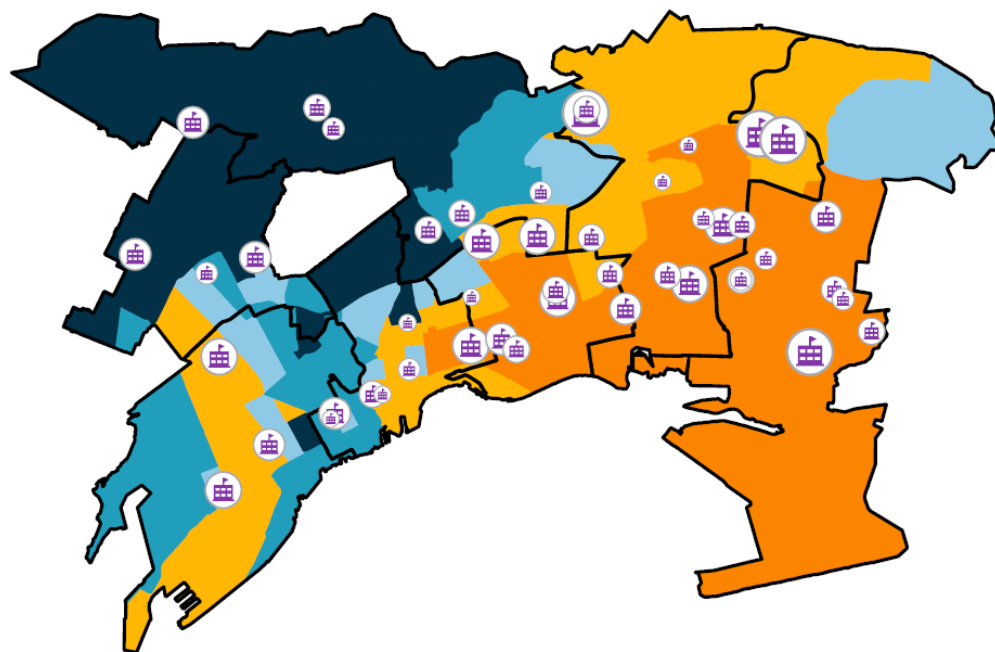
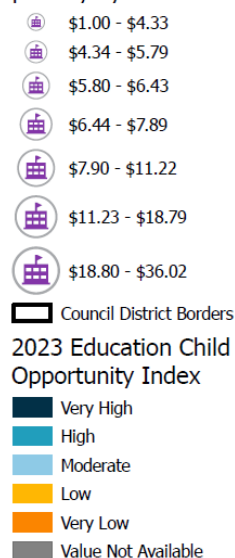
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<sup>21</sup> See the Child Opportunity Index: <https://www.diversitydatakids.org/child-opportunity-index>.

<sup>22</sup> The COI also has metro- and state-normed metrics. We focus on the nationally normed measure in consideration of possible future comparison with other place-based initiatives across the country.

## Exhibit 9. OUSD FY 2024 Estimated Daily Annualized Per-Child OCI Investments, by Site

OCI Annualized investments per PreK, TK, and SpEd children per day by site FY 24



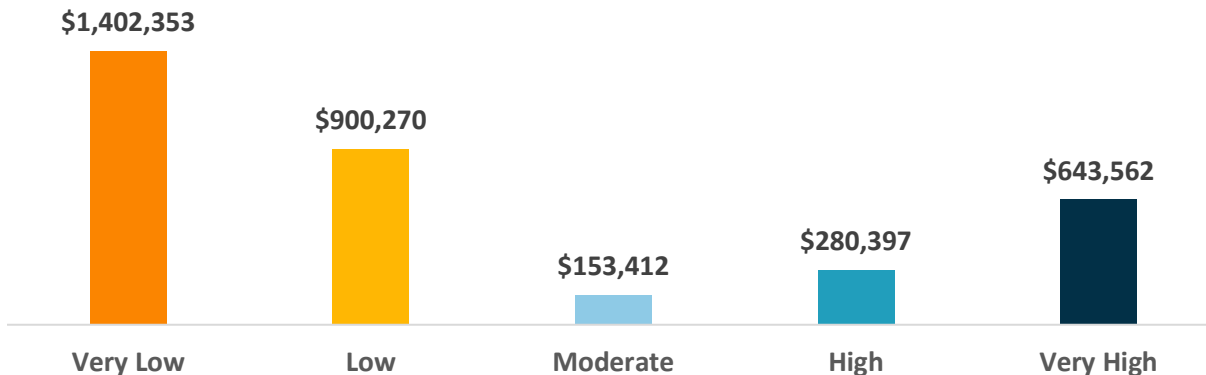
Source: Child Opportunity Index data, FY 2024 OUSD invoice data, and OUSD site address data.

Exhibit 10 summarizes the total annualized investments by COI level (i.e., opportunity zone). OCI annualized investments were highest in areas of lowest opportunity, with approximately 70% of annualized investments concentrated in areas of very low or low opportunity, and the other approximately 30% in areas of moderate, high, or very high opportunity.<sup>23</sup> This is driven by the higher number of OUSD sites in areas of very low opportunity that received OCI funding. Additionally, on average, students enrolled in low or very low opportunity zones receive more investment per child than those enrolled in high or very high opportunity zones.<sup>24</sup> It should also be noted that sites in high opportunity zones often serve children coming from lower-opportunity neighborhoods (such as the Kaiser Early Childhood Center).

<sup>23</sup> This includes \$2.25 million in investments in areas of low or very low opportunity (approximately \$1.4 million and \$860,000 in very low and low opportunity zones, respectively) and approximately \$1 million in annualized investments across neighborhoods of moderate, high, or very high opportunity (approximately \$150,000, \$275,000, and \$625,000, respectively).

<sup>24</sup> The average annual per-child funding by opportunity zone ranges from \$1,608 in very low opportunity zones to \$1,399 in the high-opportunity areas, indicating that the average enrolled student in a low-opportunity or very-low-opportunity zone receives an estimated \$209 more in funding than those enrolled in high-opportunity or very-high-opportunity zones.

## Exhibit 10. OUSD FY 2024 Annualized OCI Investments, by Opportunity Zone



Source: Child Opportunity Index data and OUSD FY 2024 invoice data.

### Value Add of FY 2024 OCI Investments in OUSD PreK and TK Programming

Next, we examined the added value of the OCI investments in OUSD early childhood classrooms. To do this, we converted the overall OCI investments and annualized OCI investments into a per-child per-day figure and compared this to the per-child per-day base funding that traditionally supports these classrooms. Most of this funding is from the California State Preschool Program (CSPP) and from regular per-pupil funding for TK. Exhibit 11 shows the additional investments in access and quality made by OCI in FY 2024 above these core state investments in PreK and TK classrooms.<sup>25</sup> Additional details are provided in Exhibit C2 in Appendix C.

When examining overall investments per child per day, we see that OCI investments increased funding for OUSD PreK by 15.8%<sup>26</sup> and by 16.6% for OUSD TK.<sup>27</sup>

<sup>25</sup> Here, we show comparisons of total OCI investments to core state investments. Comparisons of total OCI investments and annualized OCI investments are included in Exhibit A2 in Appendix A.

<sup>26</sup> 6.8% was for access, and 9% was for quality.

<sup>27</sup> 7.2% was for access, and 9.5% was for quality.

## Exhibit 11. Per-Child Per-Day FY 2024 OCI Investments Compared With Traditional State Investments in PreK and TK in OUSD



Source: OUSD FY 2024 invoice data, OUSD FY 2024 enrollment data in PreK and TK programming, OUSD estimates of CSPP funding obtained through an interview with OUSD, and estimates of TK funding, including Base Grant and Grade Span Adjustments through California’s Local Control Funding Formula and Universal TK funds, from OUSD Budget Department website.

## City of Oakland Early Childhood and Family Services

As noted earlier, OCI requires the Early Education Fund Implementation Partner, First 5 Alameda County, to focus on public agencies—COOECFS and OUSD—as Priority Partners for funding, before OCI funds are used to support the broader early childhood mixed-delivery system.

In this section, we focus on COOECFS. We first provide historical context for COOECFS Head Start funding to frame OCI’s investment in the program. Next, we share findings on OCI investments in FY 2024. A snapshot of OCI investments in COOECFS for FY 2023 (January–June 2023 only) are included in Appendix A.

### COOECFS: KEY FINDINGS

- In FY 2024, COOECFS invested the majority of its OCI funds (62%) in resources to improve the quality of the early childhood experience, with overall investments of \$2.45 million.
- OCI funds support the continued operation at three COOECFS Head Start sites while also providing support that benefits the program as a whole.



## History of COOECFS Funding

Because there have been significant recent changes in federal funding for Head Start in Oakland and elsewhere, we briefly summarize the history of COOECFS funding. COOECFS offers both Head Start and Early Head Start programs, serving children from birth to age 5. In FY 2021, the federal government awarded COOECFS a new 5-year grant (FY 2022–FY 2026) for approximately \$12.5 million to serve 622 children and their families. This award was almost \$5 million less than the previous grant award, resulting in the elimination of three COOECFS Head Start sites serving East Oakland: Franklin, Tassafaronga, and Arroyo Viejo. As of 2023 (retroactively), OCI began funding COOECFS to preserve services at the three sites. The three OCI-funded COOECFS Head Start sites are located in East Oakland, where there is a high level of unmet need for early learning and care services (Oakland Starting Smart and Strong, 2024). This investment ensured the continuity of a full range of Head Start services and supported ongoing programming without disruption to enrolled children and families. In addition, the funding strengthened COOECFS more broadly by enhancing personnel capacity, parent engagement, and PD supports.

## COOECFS OCI Investments in FY 2024

Given that COOECFS OCI investments in the first year of implementation focused on preserving services at three COOECFS Head Start sites, we center our analysis on categorizing OCI investments by the main categories of access and quality and subcategories, and reserve additional analyses for future work.

In FY 2024, COOECFS used close to \$2.5 million in OCI funds to support these resources. Our analysis shows that 38% of OCI funds for COOECFS funded resources to promote access, including supporting teacher salaries, while 62% went toward resources to enhance the quality of early learning services—very similar to OUSD’s pattern of investments. Like OUSD investments, these resources primarily served students of color: 37% of Oakland’s COOECFS Head Start students were Black or African American, and 41% were Latino or Hispanic.<sup>28</sup> All three main COOECFS Head Start sites receiving OCI investments are in areas of low or very low educational opportunity based on the Child Opportunity Index.

In FY 2024, OCI funded site improvements to four sites. OCI also has provided funds that benefited COOECFS as a whole. This includes funding for COOECFS administrative staff; teaching staff; parent engagement activities; PD for 28 early educators; program materials (e.g., classroom materials); and the program kitchen, which prepares and delivers healthy, culturally responsive meals created based on family input to all children in the program. In addition, OCI

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<sup>28</sup> Due to data limitations, these demographics are for all COOECFS Head Start sites served in Oakland and do not focus on the three main sites receiving OCI funding.

provided support to the COOECFS apprenticeship program,<sup>29</sup> which helps individuals (including parents/caregivers of enrolled children) earn college credit and obtain their teaching permits.

Exhibit 12 illustrates investments in Head Start, using the same methodology described earlier—categorizing expenses relating to access or quality. Within these categories, we categorize investments as labor (administrative or direct services), materials, PD, or facilities.

#### Exhibit 12. FY 2024 OCI Investments in COOECFS

| Category                    | Total investments* | Percentage of total investments |
|-----------------------------|--------------------|---------------------------------|
| <b>Access</b>               |                    |                                 |
| Labor: Administrative staff | \$173,541          | 7.1%                            |
| Labor: Direct services      | \$697,111          | 28.5%                           |
| Materials                   | \$62,719           | 2.6%                            |
| <b>TOTAL</b>                | <b>\$933,371</b>   | <b>38.1%</b>                    |
| <b>Quality</b>              |                    |                                 |
| Labor: Administrative staff | \$554,463          | 22.7%                           |
| Labor: Direct services      | \$835,968          | 34.2%                           |
| Professional development    | \$58,530           | 2.4%                            |
| Facilities                  | \$65,024           | 2.7%                            |
| <b>TOTAL</b>                | <b>\$1,513,984</b> | <b>61.9%</b>                    |
| <b>GRAND TOTAL</b>          | <b>\$2,447,355</b> | <b>100.0%</b>                   |

\* Total expenses include indirect costs of \$123,293, spread proportionately across categories.

Source: FY 2024 COOECFS invoice data.

## College Access Fund

Oakland Promise (OP) is the Implementation Partner for the OCI College Access Fund. OP serves as the IP for OCI's College Access Fund, which prioritizes support for public school students from low-income backgrounds and/or those who are traditionally under-represented in college. OP's mission is to advance equity and economic mobility for Oakland students by supporting their successful completion of postsecondary education.

As the College Access Fund IP, OP delivers selected direct services and is building and coordinating a college access infrastructure in Oakland. In this role, OP leads strategy, manages

<sup>29</sup> This program was halted by COOECFS in FY 2025 to revisit structure, leveraged funding, and supports for effective implementation.

investments, and coordinates a network of more than 30 community-based organizations to expand cradle-to-career college access and completion for Oakland students. The City requires that at least 25% of OP's OCI funds be subcontracted to small and/or local businesses, strengthening both educational opportunity and Oakland's local economy.

The College Access Fund invests in college access from cradle to career, including supports and services delivered in early childhood, elementary and middle school, high school, and college.<sup>30</sup> OCI-funded strategies include college-bound identity programming, academic and social-emotional supports, financial literacy education and coaching, scholarships and college savings accounts (CSAs), mentoring and peer support, and other services that help students enroll in, persist in, and complete postsecondary education.

Research shows that college-bound identity, savings habits, and family expectations begin forming in early childhood, making early investment a critical component of a long-term college access strategy (Elliott, 2024; Huseynli et al., 2025). The College Access Fund therefore spans four program areas aligned to the cradle-to-career continuum. OP organizes its work into four general program areas that align with this developmental continuum: Brilliant Baby, Kindergarten to College (K2C), College Access, and College Completion. OCI-funded OP subcontractors also fall across this developmental continuum, providing supports to children (and their families) early in life through college completion.

- **Brilliant Baby** seeds 529 CSAs for eligible newborns, provides families with financial coaching, and delivers parent education to build early school readiness and college aspirations.
- **K2C** helps develop a college-bound identity by giving Oakland public school kindergartners (and students in some elementary grades) a starter CSA and school-based activities to promote college planning and savings.
- **College Access** services and supports prepare Oakland students and families to navigate financial aid and application processes, and other supports to help students enroll in postsecondary education.

## OAKLAND PROMISE: KEY FINDINGS

- In FY 2024, the largest investments of Oakland Promise (OP) OCI funds were made at the postsecondary stage (34%), followed by the early childhood stage (18%).
- In FY 2024, OP invested \$3,487,282 of OCI funds in financial supports directly to students and families, with the largest proportion of those investments in 12th graders in the Oakland Promise Scholars program who were making the transition from high school to college.
- Combined, Brilliant Baby and K2C investments by ZIP code vary from \$573 to \$523,737. The largest concentrated investments are in areas of low or very low educational opportunity in Oakland.

<sup>30</sup> See Appendix B for more details on the age brackets and developmental stages aligned with each program area.

- **College Completion** services include advising, scholarships, mentoring, and a coordinated network to support OUSD students as they matriculate to a postsecondary institution.

## **Methods: Tracking OCI Investments in FY 2024, by Program Area and Developmental Stage**

Following a structure similar to the analysis of OUSD and COOECFS FY 2024 investments, AIR mapped line items in the FY 2024 OP invoices onto broader outcome categories. For OP, these include: (1) **college access and affordability**, (2) **college success**, and (3) **research, data, and evaluation**, and (4) community partner programming and program infrastructure. In addition to assigning each invoice line item to one of these four categories, we categorized each line within college access and affordability and college success by its target developmental stage (early childhood, elementary/middle school, high school, or college) and by its primary focus (programmatic services or financial support, such as scholarships or stipends). These categories were employed to help frame OP investments within its core strategies to strengthen college access supports and to distinguish between financial investments provided directly to students and families, compared with programmatic investments. In addition, given OP's focus on supports across the cradle-to-career continuum, we wanted to place OP's OCI investments in the context of a student's developmental stage. It should be noted that the work of the 31 subcontractors in FY 2024 is included in the estimates for programmatic services across the different developmental stages. The work of these community-based organizations is infused across OP's programs and services affecting students at different stages of development. The "Research and Evaluation" and "Community Partner Programming and Program Infrastructure" categories support broader partner infrastructure and evaluation activities that are not specific to programming or developmental stages and therefore are presented separately from those categorical structures.

It is also important to note that the categories and terminology used in this study do not align exactly with how Oakland Promise organizes and describes its work, which is complex and involves a range of strategies to build and coordinate a college access infrastructure in Oakland. For this study, we developed an outcome framework that aligns with the major goals of the OCI and could be used given the available fiscal information (e.g., we could confidentially assign costs to outcome categories).

Detailed descriptions of each category in this analysis are included in Appendix B, and a crosswalk of how we categorized each expenditure by Oakland Promise's programs and budget categories is included in Exhibit C3 in Appendix C.

## Oakland Promise OCI Investments in FY 2024

Approximately 40% of OCI investments through OP went toward College Access and Affordability programming, followed by College Success programming (33.9%). Considering developmental stage, the largest investments were made at the postsecondary stage (33.9%), followed by early childhood (17.3%). High school makes up 14.2% of investments, and elementary and middle school constitute 10.3% of investments. Exhibit 13 shows the breakdown of OP OCI investments by these categories.

**Exhibit 13. Oakland Promise FY 2024 OCI Investments, by Category**

| Category                                      | Total investments  | Percentage of overall investments |
|-----------------------------------------------|--------------------|-----------------------------------|
| <b>College Access and Affordability</b>       |                    |                                   |
| <b>Early Childhood</b>                        |                    |                                   |
| Financial Support                             | \$573,161          | 5.4%                              |
| Programming                                   | \$1,263,504        | 11.9%                             |
| Subtotal                                      | \$1,836,665        | 17.3%                             |
| <b>Elementary and Middle School</b>           |                    |                                   |
| Financial Support                             | \$618,359          | 5.8%                              |
| Programming                                   | \$473,037          | 4.4%                              |
| Subtotal                                      | \$1,091,396        | 10.3%                             |
| <b>High School</b>                            |                    |                                   |
| Financial Support                             | \$67,977           | 0.6%                              |
| Programming                                   | \$1,439,188        | 13.5%                             |
| Subtotal                                      | \$1,507,165        | 14.2%                             |
| <b>College Access and Affordability Total</b> | <b>\$4,435,225</b> | <b>41.7%</b>                      |
| <b>College Success</b>                        |                    |                                   |
| <b>Postsecondary</b>                          |                    |                                   |
| Financial Support                             | \$2,227,784        | 20.9%                             |
| Programming                                   | \$1,382,188        | 13.0%                             |
| Subtotal                                      | \$3,609,972        | 33.9%                             |
| <b>College Success Total</b>                  | <b>\$3,609,972</b> | <b>33.9%</b>                      |

| Category                                                                     | Total investments   | Percentage of overall investments |
|------------------------------------------------------------------------------|---------------------|-----------------------------------|
| <b>Community Partner Programming and Partner Infrastructure<sup>31</sup></b> |                     |                                   |
| Community Partner Programming and Partner Infrastructure                     | \$1,797,595         | 16.9%                             |
| <b>Research, Evaluation, and Data</b>                                        |                     |                                   |
| Research, Evaluation, and Data                                               | \$800,112           | 7.5%                              |
| <b>GRAND TOTAL</b>                                                           | <b>\$10,642,904</b> |                                   |

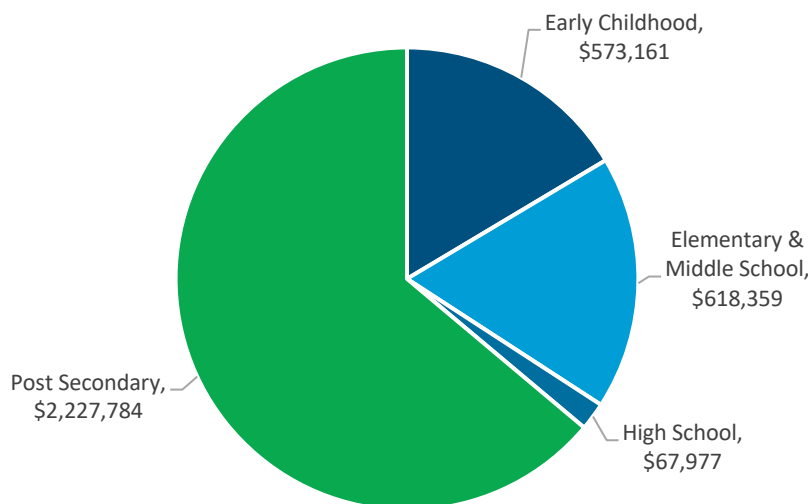
\* Total investments include administrative/indirect costs of \$1,546,405, spread proportionately across categories. Oakland Promise's indirect costs are in alignment with the Initiative's policy regarding indirect costs.  
Source: FY 2024 Oakland Promise invoice data.

In FY 2024, OP invested a total of \$3,487,281 of OCI funds in financial support directly to children, youth, and families. This support was primarily in the form of scholarships, awarded at key transition points in a child's educational journey, and CSA deposits, as well as stipends to encourage program participation (\$573,161 in early childhood, \$618,359 in elementary and middle school, \$67,977 in high school, and \$2,227,784 in postsecondary). The majority of these investments fell into the College Success category during the postsecondary stage (21% of total investments). It should be noted that the postsecondary stage is represented as the largest because it covers scholarships for students for up to 6 years of college attendance, two times each year. Smaller percentages supported earlier stages, including early childhood and elementary and middle school (each approximately 6% of total investments), followed by the high school years (0.6%).<sup>32</sup> Exhibit 14 shows this breakdown of investments in direct financial support by developmental stage.

<sup>31</sup> Community Partner Programming and Partner Infrastructure includes ~1.0 million supporting partner-delivered programming through subcontractors, ~\$170,000 supported program leadership through the CPO program, ~\$330,000 supported communications, marketing and outreach, and ~\$260,00 reflected allowable indirect costs.

<sup>32</sup> While the early childhood, elementary and middle, and postsecondary stages show a focus on direct financial supports to children and families, investments at the high school stage show a greater focus on programming, which includes mentorship and college counseling and readiness supports through college tours, college and career workshops, and financial aid application assistance. The financial supports at the high school stage were primarily through Innovation Grants; these grants were given to schools directly to support college-bound identity work at the school level.

## Exhibit 14. Oakland Promise FY 2024 OCI Investments in Financial Support, by Developmental Stage



Source: FY 2024 OUSD invoice data.

This initial analysis summarizes investments made over a single year, specifically FY 2024; however, it should be noted that investments made by Oakland Promise may benefit each student or family at multiple points across the cradle-to-career continuum. This accumulation of investments is not captured in this analysis of a single fiscal year. Future work with longitudinal data over multiple years of OCI investments in the College Access Fund may examine these dynamics of cumulative investments.

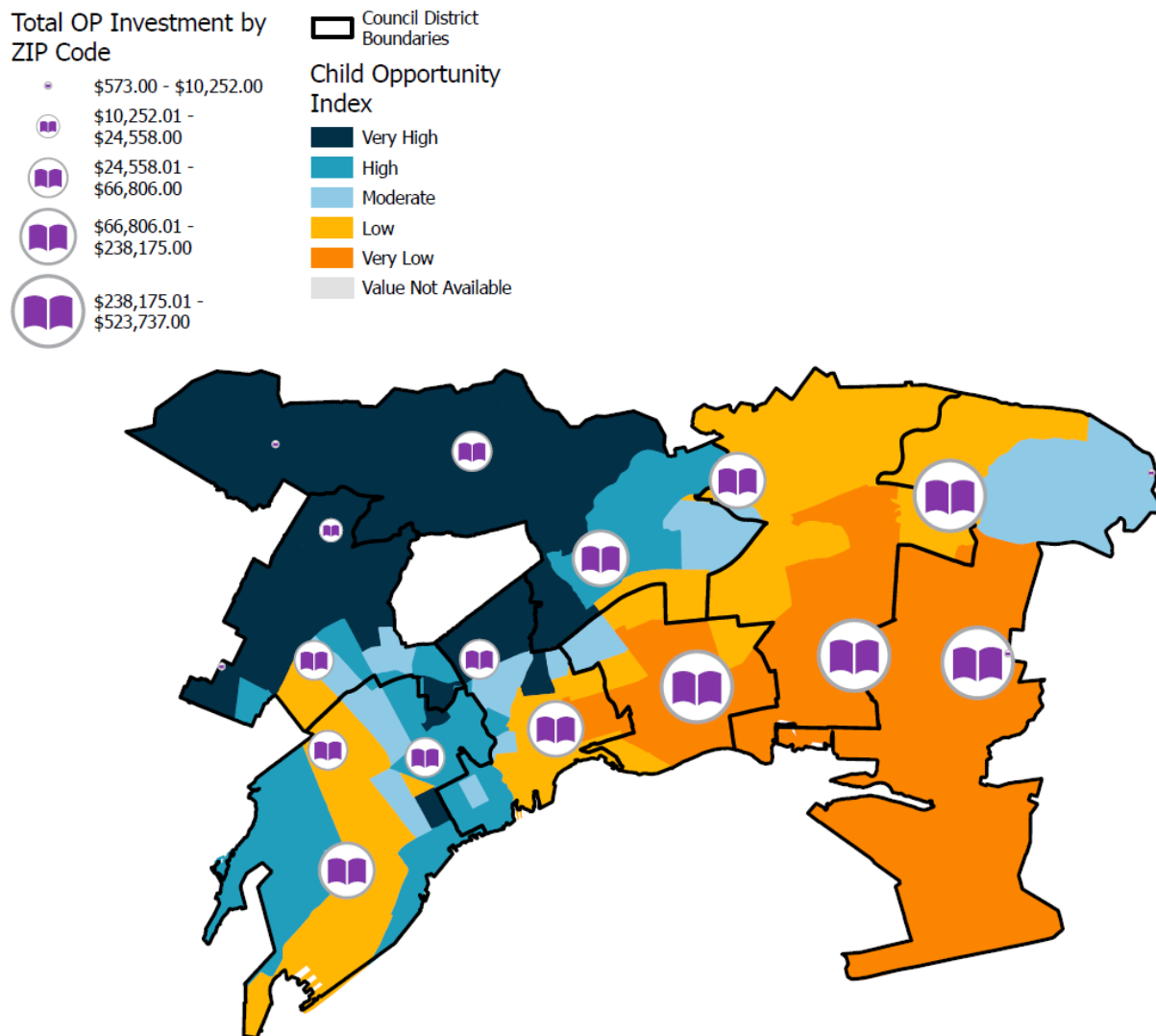
### Geographic Variation in Oakland Promise OCI Investments in FY 2024

AIR identified geographic variations in program investments for two OP programs: Brilliant Baby and K2C. We used data made available by OP on the number of families served by ZIP code for both programs, as well as by school for K2C. We used this information, as well as the total value of OP's OCI investments made in the early childhood (Brilliant Baby) and elementary and middle school (K2C) stages to estimate total OCI investments that support programming and direct financial support by both programs at the ZIP code level (as well as the school level for K2C).

Exhibit 15 shows a map of total investments in Brilliant Baby and K2C (including funds for direct financial support and programming) by ZIP code. Again, we include the Child Opportunity Index to show how the OCI investments align with Oakland neighborhoods of greatest need. The dark orange areas represent neighborhoods with the lowest level of education opportunity, and the dark blue areas represent those of highest opportunity. The black lines depict Oakland City Council districts.

Combined, Brilliant Baby and K2C investments by ZIP code vary from \$573 to \$523,737, serving from just one to more than 400 families. These programs predominantly serve children and families of color. Twenty-seven percent of Brilliant Baby participants are Black or African American, and 43% are Latino or Hispanic. For K2C, 24% of participants are Black or African American, and 31% are Latino or Hispanic, in addition to other minority populations served. For further details on the total dollar value of investments by ZIP code, see Exhibit C4 in Appendix C. We also show maps of investments at the ZIP code level for both individual programs, Brilliant Baby and K2C, in Exhibits C5 and C6 in Appendix C. As seen in the maps and the appendix exhibits, the largest concentrated investments are in areas of very low or low educational opportunity in Oakland.

### Exhibit 15. Oakland Promise FY 2024 OCI Investments in Financial Support and Programming for Brilliant Baby and K2C, by ZIP Code of Recipient

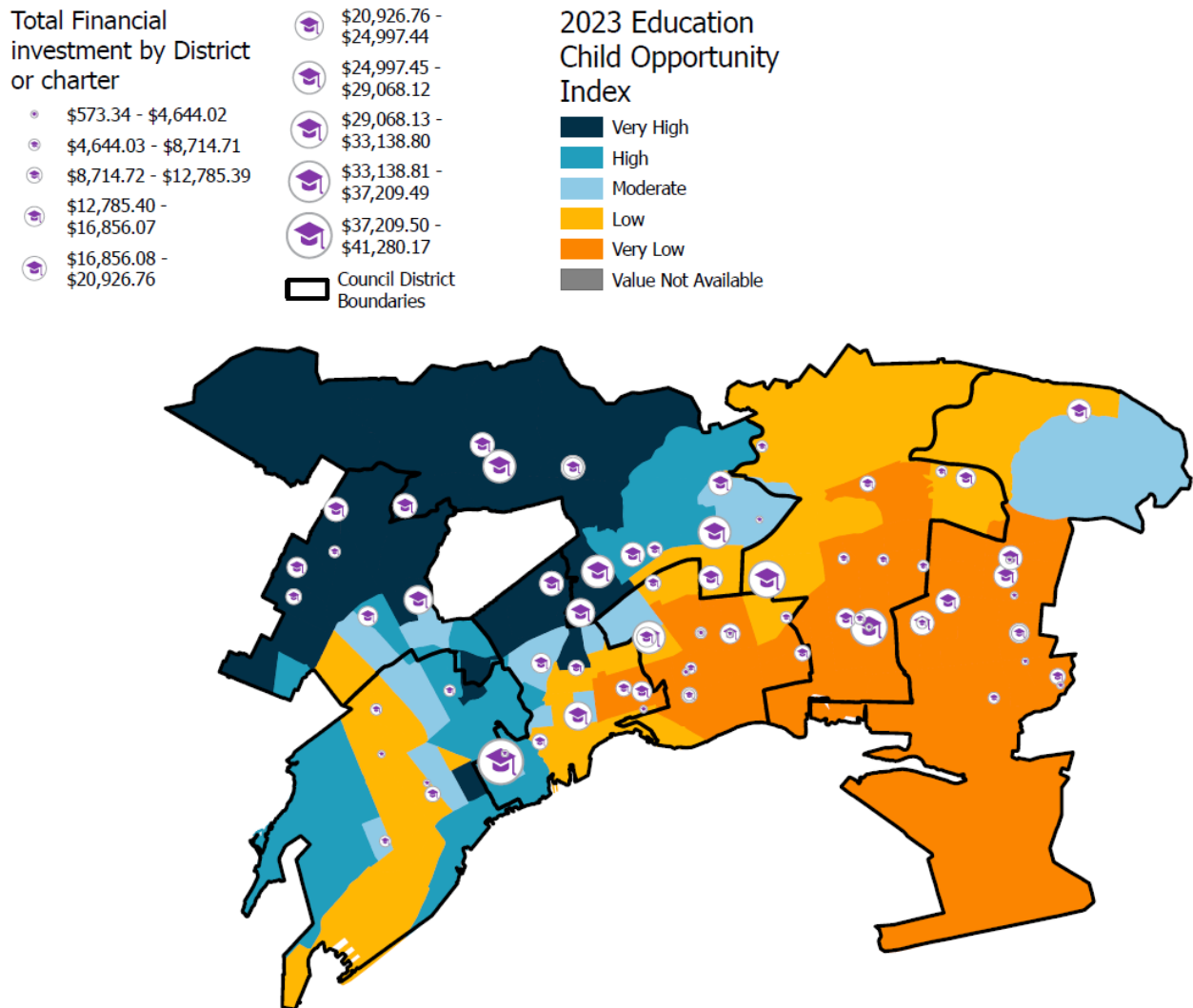


Source: Child Opportunity Index data and OP FY 2024 Supplementary RBA Metric Data Tables.



Exhibit 16 shows these same investments just for the K2C program, which provides scholarships in elementary and middle school, by the schools that beneficiary students attend. Here we see a range of investments from \$573 to \$41,280, with schools serving a range between one and 72 students benefiting from K2C scholarships and programming.

### Exhibit 16. Oakland Promise FY 2024 OCI Investments in Financial Support and Programming for K2C Program, by School of Recipient



Source: Child Opportunity Index data, Oakland Promise invoice records, and OP FY 2024 Supplementary RBA Metric Data.

Overall, this analysis shows an average investment of \$573 per family served for K2C financial support and programming and \$2,269 per family for Brilliant Baby financial support and programming.

## Economic Impact Analysis: Projecting Future Benefits

OCI is an innovative initiative that combines early childhood education with college access and completion supports, with few other comparable efforts. Therefore, economic research on these types of initiatives, including “cradle to career” strategies, is emerging (see, for example, Mathematica’s 2019 report on its place-based work on Harlem Children’s Zone and Promise Neighborhoods).

Given the magnitude of OCI’s investments, there is strong interest in understanding the broader and longer-term economic impact that those investments will have on families, the city, and the state. As detailed below, these economic impacts will likely be substantial. Any projections in this report are preliminary, however, and depend on OCI’s longer-term impacts, which cannot yet be measured. Instead, we projected future OCI benefits by combining the IPs’ RBA measures with benefit-cost evidence from published and peer-reviewed research. Although doing so is a useful and widely used way to project the long-term return on investment for public investments like OCI, these projections are inherently speculative and imprecise and rely on important assumptions that may or may not hold true in the future—for example, about the marginal labor market value of a 4-year college degree or the importance of kindergarten readiness for long-term academic success.

Broadly speaking, in making the projections in this section, we drew heavily on **existing empirical research, meta-analyses, and economic theory** in the research base to estimate the likely long-term economic effects of OCI-funded activities. This external literature includes research on grant aid, persistence and college completion, the economic value of college degrees and their impact on lifetime earnings, educational achievement, economic mobility and inequality, and costs and benefits of early investments. In the sections that follow, we discuss this literature in detail for each finding.

Please note that the discussion of the economic impact projections of OCI’s early education investments is shorter than the discussion of similar projections for OCI’s college access investments. This reflects differences in the available data to estimate the effects of these different investments. It does not indicate that one type of investment has greater benefits than the other or that we are more confident in one set of projections than another. The

### ECONOMIC IMPACT ANALYSIS: KEY FINDINGS

- OCI’s investments in access to quality early childhood programs is expected to pay off between \$3 and \$4 per dollar invested, overall.
- OP’s investments in CSAs and scholarship support are expected to yield 603 new college graduates and contribute more than \$581 million to those participants’ lifetime earnings and \$1.3 billion annually to California’s GDP.

bottom line is that we project both the early education investments and the college access investments to have a significant positive return on investment for the City of Oakland.

## Early Education Investments

In FY 2024, OCI invested largely in early education, including \$8.1 million invested in OUSD, serving more than 2,000 students, and \$2.4 million invested in COOECFS, serving 19 students. These investments were accompanied by an increase in the number (by 155 from FY 2023 to FY 2024) of subsidized early education slots available, and an increase in the number (by 119 from FY 2023 to FY 2024) of children enrolled in priority partner sites, thus enabling the Early Education Fund Priority Partners to serve more children and their families.

In a meta-analysis of the lifetime economic returns to early education investments, Karoly (2016) provides one of the most comprehensive literature reviews of ECE economic evaluations, including a realistic return expectation based on contemporary estimates and settings. In this analysis, Karoly estimates that the return on early childhood investments is between \$3 and \$4 per dollar spent (in 2014 dollars). This means that the OCI investment of \$12.4 million in ECE in FY 2024, covering investments in OUSD, COOECFS, and Brilliant Baby,<sup>33</sup> is likely to yield an economic payoff of between \$37 million and \$50 million. In addition to these long-term benefits for children, access to high-quality ECE immediately increases parental income and work hours, especially for mothers. These effects on parental economic outcomes persist well beyond the preschool years, further strengthening the expectation that ECE investments provide broad and long-term economic benefits for families (Gibbs et al., 2024; Humphries et al., 2024).

Karoly (2016) also highlights that the specifics of the design and implementation of early education investments matter. The specific combination of access and quality investments may impact the indirect effects associated with OCI, with some investments having immediate economic payoffs and others taking more time to translate into lasting savings and benefits. But regardless of whether investments target access or quality, the academic consensus about the benefits of investing in early childhood programs is strong, with prominent scholars finding that among public investments, those targeting young children—especially children who face economic disadvantages—have the greatest long-term benefits for society (e.g., Chetty et al., 2011; Duncan & Magnuson, 2013; Heckman, 2011; Heckman et al., 2013).

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<sup>33</sup> In FY 2024, this includes \$1.8 million invested in Brilliant Baby by OP, serving 692 families; \$2.4 million invested in COOECFS, serving 19 students; and \$8.1 million invested in OUSD, serving more than 2,000 students.

## College Access Investments

Oakland Promise programs provide students with direct cash support at different stages of their educational journey. The impacts of similar college-focused cash transfers have been studied extensively in the literature, enabling us to estimate the associated economic impact of one of the key outcomes targeted by OCI: college graduation rates. By converting college graduation rates (captured by OP's RBA measures) into expected economic returns, we were able to calculate a specific benefit-cost ratio associated with OP's college supports. We could more easily make these projections for the programs funded through the OCI College Access Fund programs than those for the OCI Early Education investments because the shorter "time to outcome" timeline of many of these college supports makes it easier to project longer-term benefits. (The same caveats about these projections not being rooted in actual observed OCI impact results continue to apply.)

**RBA Measures.** To document improvements along important indicators of student improvement/progress, the City of Oakland worked with the OCI IPs to develop a set of RBA measures.<sup>34</sup> These measures provide an annual evaluation and accountability framework that can be used to help track how well the OCI IPs are using OCI funds to improve educational outcomes for Oakland children.

For the OCI Early Education Fund in FY 2024, there were 11 RBA measures.<sup>35</sup> Metrics included data such as the number of free and subsidized ECE slots by program type, the number of children enrolled in Priority Partner sites, and the retention rate for early educators.

For FY 2024, Oakland Promise, the College Access Implementation Partner, reported on 14 RBA measures, which included indicators such as the number of Oakland 12th graders who receive scholarships and the total amount of scholarship funds awarded by OP.

We focused our analysis of OCI's potential economic impact on a subset of RBA measures related to college access that have robust evidence in the research literature linking them to outcomes that, in turn, have documented evidence of economic impact. Specifically, we generated estimates of OCI's economic impact related to the following RBA outcomes:

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<sup>34</sup> The development of the RBA measures was a collaborative effort among the OCI Accountability Officer, Implementation Partners, and others. The OCI Accountability Officer first shared the Early Education Fund's RBA measures with First 5 Alameda. Building off the directive provided by the Accountability Officer, First 5 Alameda engaged a committee of interdisciplinary early care and education experts and consulted public system partners, OUSD and COECFS, to ensure alignment and reach agreement on a refined set of RBA measure for FY 2023–FY 2027. Performance targets were set collaboratively with public system partners to ensure a shared understanding of what success means and to promote accountability and transparency in implementation. The College Access Fund RBA measures were also developed collaboratively between the OCI Accountability Officer and Oakland Promise staff.

<sup>35</sup> See Exhibits C7 and C8 in Appendix C for a list of all RBA measures.

1. CSAs provided to children in Oakland at birth and kindergarten entry through the Brilliant Baby and K2C programs;
2. College scholarships provided to Oakland students at different points in their K–12 careers; and
3. Increased graduation rates for students participating in the OP programs compared with those of nonparticipating classmates.<sup>36</sup>

### ***College Savings Accounts***

OCI invested in College Savings Accounts (CSAs) for Oakland newborns and entering kindergartners through the Brilliant Baby and K2C programs, respectively. Specifically, in FY 2024, 692 infants born in Oakland each received \$500 in a CSA through the Brilliant Baby program. An additional 1,627 kindergartners received \$100 in similar CSAs through K2C. Friedline et al. (2013) found that Black children with early CSAs between \$1 and \$499 were four times more likely to graduate from college than their peers without early CSAs. Based on this remarkable differential, we can project that OCI investments in Brilliant Baby accounts in FY 2024 may in the future result in an additional 125 students graduating from college who otherwise would not have.<sup>37</sup>

The academic literature has documented benefits for both lifetime earnings and state gross domestic product (GDP) of earning a postsecondary degree. For example, Carnevale et al. (2011) estimate that a student earning a bachelor's degree earns an average of \$964,000 more than their peers over a lifetime, and the National College Attainment Network (2023) estimates that, in California, one additional postsecondary degree adds at least \$2.3 million total to the state GDP over a graduate's lifetime. Based on this literature, we can thus project that OCI's \$315,000 investment in Brilliant Baby could yield a long-term economic impact of \$120M in additional lifetime earnings for students and add \$286M to the state's future GDP. We further expand on this projection in the benefit-cost ratio analysis later in this section.

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<sup>36</sup> The RBA measures used from Oakland Promise programming similarly focus on CSAs and scholarships because these areas have the strongest evidence base in the literature demonstrating economic impact. Estimates of the economic impact of other aspects of Oakland Promise programming supported by OCI investments—particularly programming supported by community-based organizations—are therefore not included in this analysis. This does not mean that these services lack impact; rather, their impact has yet to be measured.

<sup>37</sup> To calculate the estimated additional graduations resulting from the Brilliant Baby program, we multiplied the proportion of Brilliant Baby enrollments by the proportions reported by Friedline et al. (2013). The study estimated that, without CSAs, Black children graduated at a rate of 6%, compared to 24% of those who received CSAs. We calculated the difference between those proportions and multiplied it by the total number of Brilliant Baby enrollments. This calculation produces an estimate of the *additional* number of future graduates that Brilliant Baby investments would likely produce based on the available research.

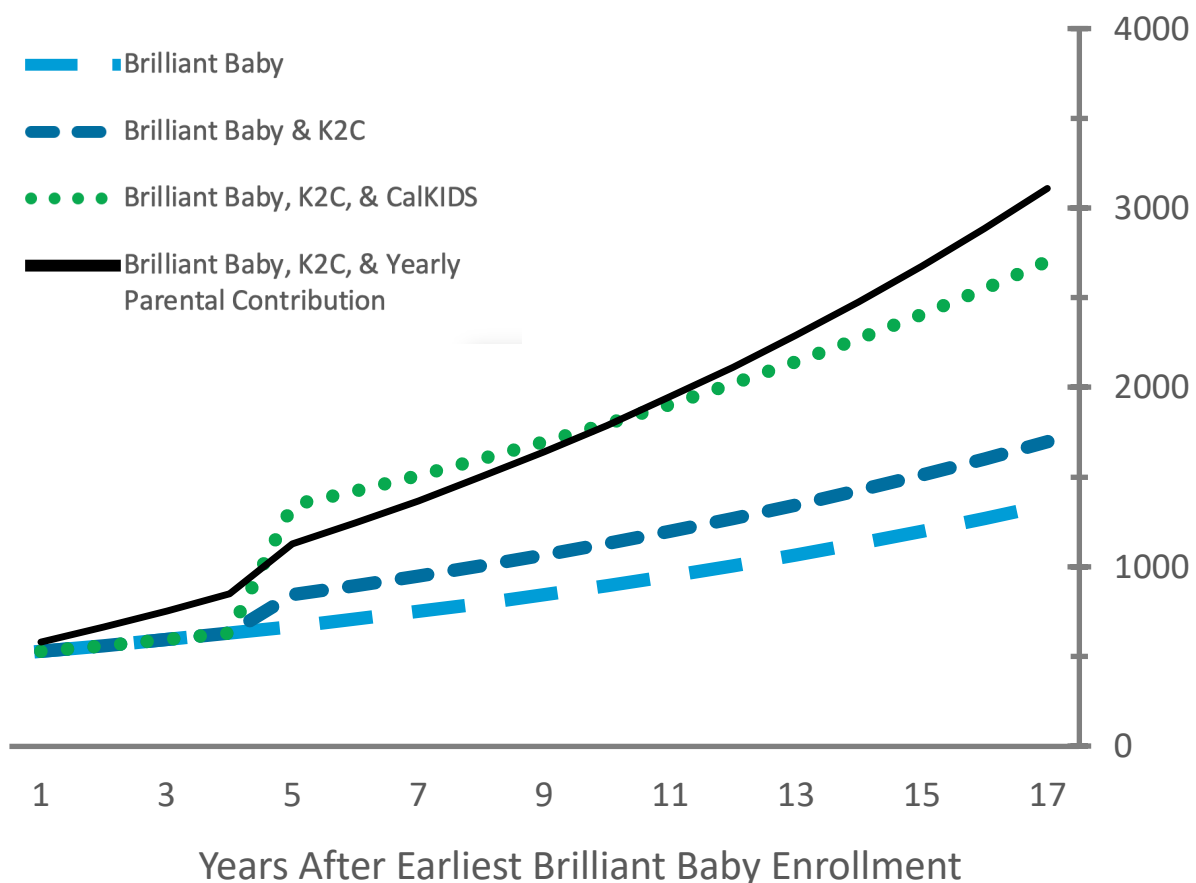
In FY 2024, 1,627 kindergartners received not only \$100 deposits into their CSAs but also a range of other supports from OCI investments in the K2C program. Oakland's K2C program is not the first such program in the Bay Area; the 2010 kindergarten cohort in San Francisco also received supports through a similar program. A recent study of that initiative (Elliott et al., 2024) found that students from under-represented college-going groups who participated in the program (receiving the automatic CSA seed deposit) enrolled in college at a rate of 50%, compared with 38% of nonparticipants. Analyses by the Public Policy Institute of California (2024) tell us that the average 6-year college graduation rate among all first-year students in California as of 2022 was 71.4%. If we assume that K2C beneficiaries in Oakland experience outcomes similar to those who benefited from the San Francisco program, we can project that 50% of the 1,627 K2C students would enroll in college, compared with only 38% of their non-K2C peers. If 71.4% of these entering students then graduated, we would expect the OCI investment in K2C to yield an additional 139 college graduates. Following the above estimates from Carnevale et al. (2011) and the National College Attainment Network (2023), we therefore project that K2C would produce an economic impact of \$133 million in additional lifetime earnings for participants, adding \$318 million to the state GDP.

In addition, through the Brilliant Baby and K2C investments in CSAs, OP helps families leverage funds from other sources, including their own savings, to build more resources for college through investments. Recent research underscores the importance of wealth accumulation for college graduation. Vasilenko (2025) shows that the amount of funds accrued in 529 accounts is a strong predictor of college completion at the time of college enrollment. This pathway highlights how financial education and logistical support for enrollment into other existing programs can further compound the effects we have highlighted.

When San Francisco implemented its K2C program, it also deposited \$50 in each account. Its first cohort of graduating seniors had an average of \$1,422 in their savings accounts by high school graduation. Teaching families and students the importance of compounding savings and interest is a promising way that K2C programs like these help set families on a path to college. Exhibit 17 shows how OP opens multiple paths for families as they seek to take full advantage of new, structured savings accounts and complementary programs. It is common for families to begin participating in the Brilliant Baby program and continue to the K2C program. Likewise, the K2C program helps eligible students enroll in the California Kids Investment and Development Savings Program (CalKIDS). In the exhibit, we show how each path can produce compounding results as children and families progress in their educational trajectories. OP's OCI Brilliant Baby investments can compound benefits with state programs, family resource development, and OP's later programs. By the time a student with this history of program support graduates from high school, the household can count on more resources than any one program is responsible for. For example, if families contribute \$50 a year to children's savings

accounts upon the start of K2C and also benefit from Brilliant Baby, they can expect to accrue upwards of \$3,000 by the time their child is ready to enroll in college. This amount is more than they would accrue if the child had participated in Brilliant Baby, K2C, and CalKIDS. In an environment where every additional \$1,000 matters for college graduation, student pathways through OP programs have the possibility of compounding benefits further than the estimates provided in this report. For example, College Completion participants receive \$1,000 of scholarship support every year they attend college.

### Exhibit 17. Potential Leverage of FY 2024 OCI Investments to Support Family Resources for College



Source: AIR analysis, OP Program Details.

*Note.* Based on program assumptions regarding the timeline of incentive provision for each program, the authors modeled potential pathways for savings accruals across multiple programs through time. For example, the Parental Contribution pathway assumes that the child has enrolled in Brilliant Baby in Year 1, that the same child enrolls in K2C at age 5, and that the family contributes \$50 to that child's savings each year. We also assume a 6% annual interest rate. We estimate that if the child is enrolled only in Brilliant Baby, they will have an estimated \$1,346 in their my529 account by the time they enroll in college. For the San Francisco K2C program's first graduating cohort, the average student had \$1,077 in their account by the time they graduated from high school. These accounts originally were seeded with \$50.



### ***College Completion Investments***

We projected the economic benefits of OCI funds directly supporting college completion, specifically through investments in scholarships and other supports provided to students through OP's College Completion program. College-enrolled OP scholars receive mentorship, peer support, and an average of \$1,241 in scholarships. Specifically, we projected the economic impact of increased college graduation rates for those 1,492 OP scholars who chose to pursue a 4-year degree. The RBA measures note that OP scholars graduated from college at a rate of 51.2% in 2024, compared with the overall average of 28.5% for OUSD students. Thus, College Completion scholars are 23% more likely to graduate than the overall OUSD student population. Yet because OP scholars go through a scholarship application process and are not randomly chosen, students who either choose to apply for the OP Scholars program, or are eligible to apply for the program, may differ in meaningful ways from non-applicant students. Therefore, we consider this a potential upper-bound estimate for the impact on college graduation rates for the OUSD student population enrolled in the College Completion program.

The literature provides for an additional way of calculating the impact of the College Completion program. Castleman and Long (2013) used a regression discontinuity design to measure the impact of modest grants awarded through the Florida Student Accessibility Grant. They estimated that every \$1,000 in college grants awarded increases the probability that a student will graduate within 7 years of starting college by 4 percentage points. If we assume a similar effect in Oakland, given that the average OP College Completion award is \$1,241, we could project that College Completion scholars would be 5% more likely to graduate from college than other similar students without the support of College Completion. This figure would be a more conservative estimate of the impact of the program.

Given these upper-bound and lower-bound (more conservative) figures, we can project the potential impact of the program on college graduation to be between 75 and 339 additional graduates. The resulting lifetime benefits would range from \$172 million to \$789 million, assuming that each additional college graduate has an additional \$964,000 in lifetime earnings than they otherwise would have accrued.

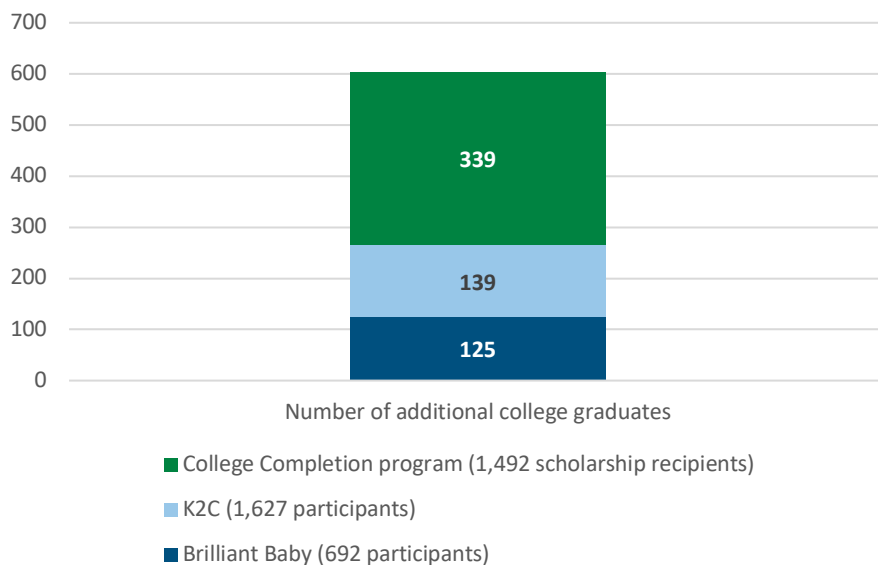
### ***Predicted Economic Impacts of OCI-Funded Oakland Promise Programs***

OP has adopted a framework that supports Oakland children and students at different stages of their educational path. Funds are allocated for infants, students from kindergarten through middle school, high school students, and OUSD students enrolled in postsecondary education. Each program has a structure that OP understands to be the most supportive of the stage in which families and students find themselves. Children and families in the earlier stages of their educational path focus on financial strategies to prepare for college gradually and are supported with seed money. Students and families in the later stages of their educational path



receive college scholarships and programming to support the logistical and cultural components involved in college enrollment and persistence. In doing so, OP aims to produce economic returns with early childhood investments and to bolster graduation rates for Oakland students. Exhibit 18 shows how each OP program across these stages—Brilliant Baby, K2C, and College Completion—is projected to contribute to additional college graduates.

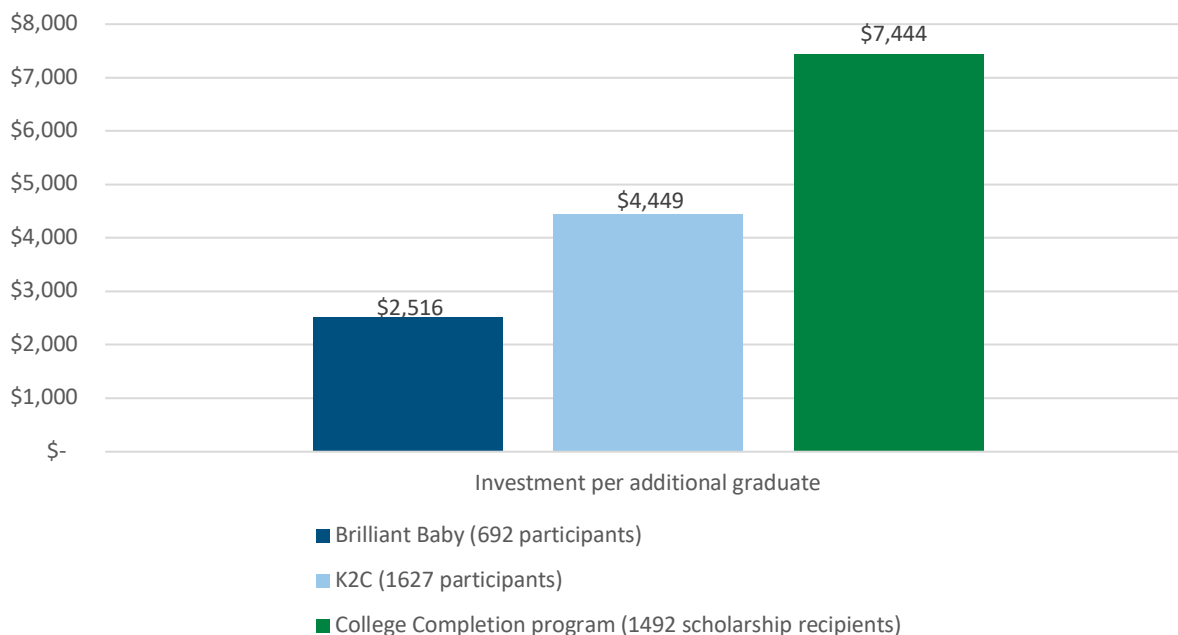
**Exhibit 18. Number of Additional College Graduates Projected from Each of OP’s OCI Program Investments, FY 2024**



Source: AIR analysis, OP RBA measures.

Although investments in the College Completion program are projected to produce more graduates than the K2C or Brilliant Baby programs in the near-term, comparison of outcomes (additional college graduates) on a per-dollar basis shows a different picture: Early investments could eventually pay off more than later ones. Exhibit 19 shows the expected cost-effectiveness of each program investment in terms of dollars spent per additional college graduate.

## Exhibit 19. Investments per Additional Projected College Graduate for Each OP Program, FY 2024



Source: AIR Analysis.

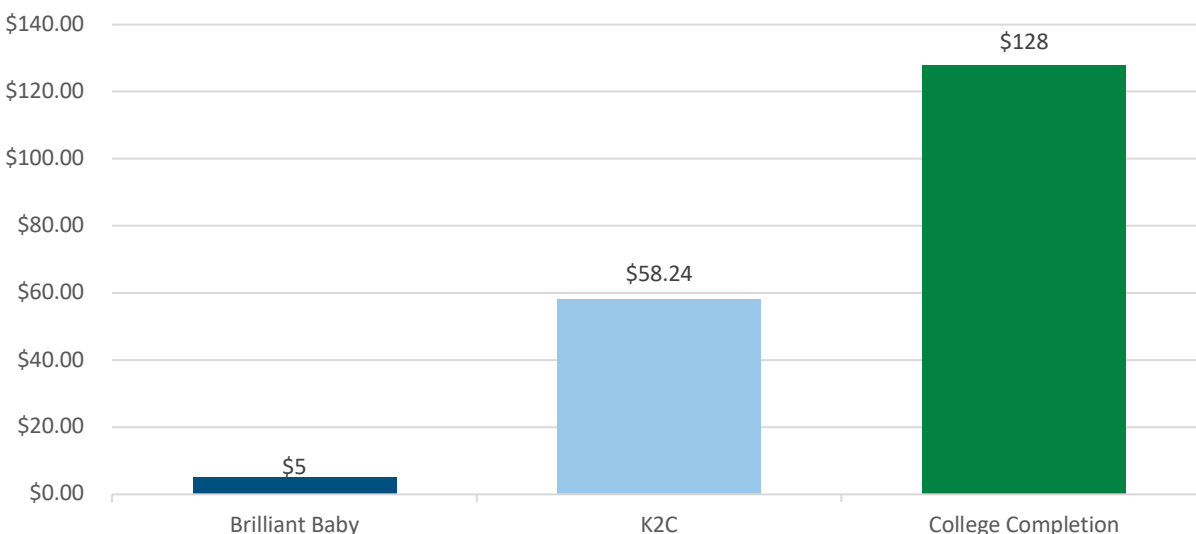
Based on these estimates, 5 years after each program's current cohort graduates, we can calculate cost-benefit ratios associated with each program. For every dollar invested in Brilliant Baby, we would expect an economic payoff of \$8; K2C might generate \$17 per dollar, and the College Completion program would be expected to generate between \$4 and \$18.<sup>38</sup>

Our approach to estimating these cost-benefit ratios, and the predicted economic impacts discussed throughout this section, prioritize college graduation rates as the outcome that most easily reflects OCI goals, although program participants likely will experience additional benefits throughout their academic career beyond increased college graduation rates. A crucial part of these benefit-cost projections recognizes that OCI investments will likely mature at different

<sup>38</sup> To estimate these benefit-cost ratios, we rely on California College Affordability and Outcomes data published by the National College Attainment Network, which estimates that college graduates each contribute \$210,467 more to the GDP relative to those with no education beyond high school. Assuming an average yearly GDP contribution of \$210,467 across the first 25 years of the labor force, we fit the data to a quadratic upward-sloping curve. This exercise discounts contributions in the earlier years after college graduation, a time in which new workforce entries likely will experience more training than GDP production. These yearly estimates are accumulated and discounted using a 3% discount rate to obtain present-value estimates that are divided by total program expenditures. The calculation requires assuming that each program is strictly associated with a cohort timeline. We assume that all Brilliant Baby program enrollees are age 1, K2C enrollments occur at age 6, and College Completion enrollees are 18 years old. We also assume that they all will graduate at age 22 and that they will join the California workforce immediately afterward. It should also be noted that this analysis reflects expected returns from just one year of investments. Scholarships typically go to OP scholars for each year they attend college; future analyses with longitudinal data may examine the returns on the accumulation of investments over multiple years.

times. We assume additional college graduations that result from the Brilliant Baby program likely will occur approximately 22 years from now, while College Completion effects will begin to be felt, at the latest, 4 years from now. Looking 25 years into the future, we project that for every dollar spent, Brilliant Baby will have contributed \$5 to California’s GDP, K2C will have contributed \$58, and College Completion will have contributed between \$46 and \$210. These figures should be interpreted with caution because some new college graduates may move out of California and work in other states, reducing the GDP returns to California specifically. Exhibit 20 shows projected 25-year GDP benefit-cost ratios by OP program based on FY 2024 OCI investments.

**Exhibit 20. Projected 25-Year GDP Benefits of \$1 Spent by OP Programs, FY 2024**



*Note.* The midpoint between the estimated lower and upper bounds was used to construct the 25-year College Completion benefit-cost ratio shown.

Source: AIR Analysis.

Exhibit 21 summarizes the projected economic impacts of OCI-supported college access and completion investments and Exhibit 22 shows the projected economic impact of selected OCI investments.

### Exhibit 21. Summary of Projected Economic Impact of Selected OCI College Access and Completion Investments

| OCI investment                                                 | Pathway                                                                                                                                       | Projected economic impact |
|----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| Brilliant Baby early college savings accounts                  | Increased likelihood of graduating from college and impact of additional postsecondary degrees on California GDP over the graduate’s lifetime | \$286 million             |
|                                                                | Increased lifetime earnings from college degree                                                                                               | \$120 million             |
| K2C program participation                                      | College degree lifetime impact on state GDP                                                                                                   | \$319 million             |
|                                                                | Increased lifetime earnings from college degree                                                                                               | \$134 million             |
| Increased college graduation rate for Oakland Promise scholars | College degree lifetime impact on state GDP                                                                                                   | \$781 million             |
|                                                                | Increased lifetime earnings from college degree                                                                                               | \$327 million             |

### Exhibit 22. Projected Economic Impact of Selected FY 2024 OCI Investments

| Total projected estimated impact of FY 2024 OCI investments on . . . |                      |
|----------------------------------------------------------------------|----------------------|
| Participants’ lifetime earnings                                      | California state GDP |
| \$581 million                                                        | \$1.3 billion        |

## Conclusions



This analysis investigates how OCI funding was used to invest in programs throughout the City of Oakland to increase access and improve the quality of educational experiences for children from early childhood through college, with a focus on children furthest from opportunity.

In FY 2024, OCI investments supported the Early Education Fund, managed by First 5 Alameda, and the College Access Fund, managed by Oakland Promise (OP). These funds supported participants and sites in neighborhoods of low educational opportunity across Oakland, serving populations that historically have been disenfranchised and furthest from access to opportunities.

### Early Education Fund

As the Implementation Partner for the Early Education Fund, First 5 Alameda used OCI funds in FY 2024 for planning, monitoring, and accountability purposes. Most of our analyses in this report focus on how the two Early Education Fund Priority Partners—OUSD and COOECFS—used OCI funds to implement the Initiative.

Our analyses show how OUSD used OCI funds to invest in resources that improve access to, and the quality of, early childhood experiences and to support students across Oakland neighborhoods of low and high levels of educational opportunity.

More than 70% of OUSD early childhood sites receiving OCI funds are located in areas of low or very low opportunity in Oakland. In addition, our analyses document OCI's significant early childhood investments in capital infrastructure in FY 2024 that will have benefits for multiple cohorts of children. When looking at annualized investments, we see that OUSD invested a total of \$1,959,140 in labor supporting direct services (constituting 58% of annualized investments), such as behavior health specialists, early learning coaches, and family navigators. In addition, OCI funds provided a significant boost in base funding for OUSD PreK and TK classrooms, increasing per-child and per-day resources by 15.8% and 16.6%, respectively, above the program's core state funding.

For COOECFS, in FY 2024, OCI funds supported the continued operation of three Head Start sites and provided program-wide support. The majority of COOECFS OCI funds (62%) were used for resources that improved the quality of the early childhood experience. All three sites preserved through OCI funding are located in areas of low or very low opportunity in Oakland.

### **College Access Fund**

Our analyses documented OCI investments to promote college access and completion, through financial supports and programming from "cradle to career." As the College Access Fund IP, OP delivers selected direct services and is building and coordinating a college access infrastructure in Oakland. In this role, OP leads strategy, manages investments, and coordinates a network of more than 30 community-based organizations to expand cradle-to-career college access and completion for Oakland students.

In FY 2024, OP made investments in children and families throughout the continuum of developmental stages, from birth through postsecondary education, with the largest percentage of investments made at the postsecondary stage (34%), followed by the early childhood stage (18%). These OCI investments included direct monetary support to children and families as well as investments in programming to support children and families preparing for and making the transition to postsecondary education. In FY 2024, OP invested \$3,487,282 in direct financial supports to students and families, with the largest proportion of those investments in students' entry into college. Finally, OP is focusing on the areas of greatest need in Oakland. For example, the largest concentrated investments from Brilliant Baby and K2C combined are in areas of very low or low educational opportunity.

## Economic Impact

In terms of economic impact, OCI investments in the Early Education and College Access funds are projected to have substantial, positive long-term payoffs. These projections, based on a combination of RBA data from the OCI IPs and published literature associated with similar investments, result in projected benefit-cost ratios ranging from 3 to more than 100, indicating that the projected return on every dollar invested ranges from 3 to more than 100 dollars. These projected benefits are especially robust for OP programs that support students who are about to enroll in college or are already enrolled, given the substantial documented benefits of earning a college degree and the relatively short time until those benefits are realized. Benefits of the Early Education Fund investments, given the age of children served, take longer to pay off in increased earnings. Research clearly indicates, however, the significant and long-term benefits of investments in early education. More definitive impact data will be needed to confirm these positive projections for OCI.

## Acknowledgments

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This is the first economic impact study of the Oakland Children’s Initiative (OCI), providing some early insight into how Initiative funds are being used to reduce disparities in educational outcomes for children and youth in Oakland, California. We thank the OCI partners—including First 5 Alameda County, Oakland Unified School District, the City of Oakland Early Childhood and Family Services, and Oakland Promise—for their time, attention, and engagement, which were essential to the success of this evaluation.

We also thank our partner, RDA Consulting, including RDA’s Fabián Rivera-Reyes, for their significant, deeply valued contributions to this report. Founded in 1984, RDA Consulting is an employee-owned social purpose corporation. As a full-service consulting firm, RDA provides expertise and capacity in evaluation, planning, community engagement, and facilitation for health and human services systems and programs. RDA’s work centers community voice and culturally responsive partnerships and practices to improve overall community well-being. RDA Consulting is located in Oakland, California. For more information, visit [rdaconsulting.com](https://rdaconsulting.com).

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# Appendix A. Fiscal Year (FY) 2023: Financial Snapshots, by Partner

This appendix presents financial snapshots from fiscal year (FY) 2023 for the Implementation Partners.

## FY 2023: Financial Snapshot for OUSD

Exhibit A1 shows the Oakland Children’s Initiative (OCI, or the Initiative) early education investments made by Oakland Unified School District (OUSD) between January and June 2023 across a range of areas, including infrastructure improvements and capacity building.

For OUSD, approximately two thirds of Initiative funds invested during this time frame were used to improve early childhood facilities, including initial investments in a new, developmentally appropriate playground and upgrades at the Kaiser Early Childhood Center to comply with requirements of the Americans with Disabilities Act. Program improvements and new staff hires were among other OUSD early education investments, including a family navigator to help families enroll in early education services.

### Exhibit A1. OCI FY 2023 OUSD Investments

| Expense category           | FY 2023 (January–June 2023)<br>actual | Percentage of total expenses |
|----------------------------|---------------------------------------|------------------------------|
| Personnel – Direct (1 FTE) | \$164,847                             | 37.3%                        |
| Infrastructure             | \$276,623                             | 62.7%                        |
| <b>TOTAL</b>               | <b>\$441,470</b>                      |                              |

*Note.* FTE = full-time employees.

Source: First 5 Alameda Oakland Children’s Initiative program and budget overview, April 2024.

## FY 2023: COOECFS Financial Snapshot

For COOECFS, most of the OCI investments made between January and June 2023 supported personnel (with a total of 33 full-time employees) and parent engagement efforts, such as parent education classes and translation software). Other investments included professional development for 106 staff across the program.

## Exhibit A2. OCI FY 2023 COOECFS Investments

| Expense category   | FY 2023 (January–June 2023)<br>actual | Percentage of total expenses |
|--------------------|---------------------------------------|------------------------------|
| Personnel (33 FTE) | \$1,811,098                           | 77.4%                        |
| Operating          | \$387,508                             | 16.6%                        |
| Infrastructure     | \$9,200                               | 0.4%                         |
| Indirect Costs     | \$132,278                             | 5.7%                         |
| <b>TOTAL</b>       | <b>\$2,340,084</b>                    |                              |

Source: First 5 Alameda Oakland Children’s Initiative program and budget overview, April 2024.

## Fiscal Year 23: Financial Snapshot for Oakland Promise

We present spending during the initial rollout of OCI, from January through June 2023, for Oakland Promise (OP), as shown in Exhibit A3. In this initial period, OP focused on building its capacity, onboarding subcontractors, and providing scholarships to students.

## Exhibit A3. OCI FY 2023 Oakland Promise (OP) Investments

| Activities                                                                                            | Program strategies                                    | Amount      |
|-------------------------------------------------------------------------------------------------------|-------------------------------------------------------|-------------|
| Brilliant Baby, K2C, College Access, College Completion                                               | OP direct-service programming                         | \$1,400,000 |
| OCI-funded OP subcontractors (16 subcontractors, with more than 50% based in Oakland)                 | Program subcontractors                                | \$1,500,000 |
| Scholarships directly to students, Innovation grant, <sup>39</sup> College Savings Account incentives | Direct payments to students and families              | \$1,500,000 |
| Mission support, <sup>40</sup> five new OP positions                                                  | Communications, mission support, data, and evaluation | \$2,500,000 |

Source: Children’s Initiative Oversight Commission, September 28, 2023.

<sup>39</sup> Grants given directly to schools to support college-bound identity work at the school level.

<sup>40</sup> Overhead costs associated with implementing OCI programs, and non-program related direct costs, such as software for email and text communication with program participants.

## Appendix B. Categorizations

This section provides detailed descriptions of the categorizations used for our analysis of Oakland Unified School District (OUSD), City of Oakland Early Childhood and Family Services (COOECFS), and Oakland Promise (OP) invoices.

### OUSD

The analysis of OUSD FY 2024 investments drew primarily from information provided in the program plans and invoices for First 5 Alameda, including OUSD and COOECFS. As needed, we supplemented this information with program documents and information obtained through interviews with staff. The OUSD program plans and invoices provided detailed information on 49 line items of investments, across eight budget categories, and the COOECFS invoices provided information on 48 line items across six categories, which we recategorized using the following framework:

#### Primary Categories

- **Access:** Investments that help children access services
- **Quality:** Investments that improve the experiences of children receiving the services

#### Subcategories

- **Labor: Direct Services:** Staff providing direct services to families and children or supporting teachers in service delivery
- **Labor: Administrative:** Staff overseeing classroom and/or program operations
- **Family Fee Reductions:** Funding to reduce or eliminate family fees for services
- **Materials:** Outreach materials and classroom, curricular, and training materials
- **Facilities:** Upgrades or new construction to early childhood buildings or campuses
- **Professional Development:** Training, certifications, and support to staff to promote growth and development

#### Oakland Promise Category Definitions

The analysis of OP's FY 2024 (July 2023–June 2024) investments drew primarily from its invoice and general ledger data. The cumulative FY 2024 general ledger of expenses contained more than 14,000 line items grouped into eight budget categories, which we recategorized using the following framework:



## Outcome Categories

- **College Access:** Cradle-to-career support services for children, youth, and families, including financial literacy classes and coaching, academic and career readiness supports, support for the college application and financial aid process, scholarships, and college savings accounts (CSAs)
- **College Success:** Supports aimed at college matriculation, persistence, and completion, including peer support, mentoring, advising, career development, and alumni supports
- **Research, Evaluation, and Data:** Investments in research and in evaluation and data infrastructure to support OCI implementation, planning, and evaluation
- **Other:** Includes investments in other departments beyond direct programming, including Finance, Communications, and CPO (budget for the Chief Program Officer)

## Developmental Stage Categories

- **Early Childhood:** Investments in the Brilliant Baby program, serving eligible families with children from birth through 5 years old
- **Elementary and Middle School:** Investments in Kindergarten to College (K2C), spanning grades K–9, and other academic, financial, and social-emotional support services provided in elementary and middle school to promote college access and a college-bound identity
- **High School:** Academic, financial, and social emotional supports for high school students, including support to prepare for and apply to postsecondary programs, including college and career technical education
- **Postsecondary:** Academic, financial, and social-emotional supports for college students, including peer support, mentoring, advising, career development, and alumni supports

## Program Type Subcategories

- **Financial Support:** Direct aid to youth and families through scholarships, seed funding for family CSAs, and cash allocations (e.g., gift cards) to incentivize program participation
- **Programming:** Programs that help students and/or families prepare for and succeed in college and in career and technical education



## Appendix C. Supplementary Exhibits

**Exhibit C1. OUSD FY 2024 Annual Site-Level and Daily Per-Child Annualized Investments, Overall and by Category**

| OUSD program name                    | Annualized investments in access per site, FY 2024 | Annualized investments in quality per site, FY 2024 | Total annualized investments per site, FY 2024 | Daily annualized investments in access per child by site, FY 2024 | Daily annualized investments in quality per child by site, FY 2024 | Daily total annualized investments per child by site, FY 2024 | Child Opportunity Index (education domain) |
|--------------------------------------|----------------------------------------------------|-----------------------------------------------------|------------------------------------------------|-------------------------------------------------------------------|--------------------------------------------------------------------|---------------------------------------------------------------|--------------------------------------------|
| Acorn Woodland                       | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$2.27                                                            | \$3.27                                                             | \$5.54                                                        | Very Low                                   |
| Allendale Elementary                 | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.61                                                            | \$5.20                                                             | \$8.81                                                        | Low                                        |
| Arroyo Viejo CDC                     | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.35                                                            | \$4.83                                                             | \$8.19                                                        | Very Low                                   |
| Bella Vista CDC                      | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$1.34                                                            | \$1.93                                                             | \$3.27                                                        | Very High                                  |
| Bridges @ Melrose Academy Elementary | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$2.82                                                            | \$4.06                                                             | \$6.88                                                        | Very Low                                   |
| Brookfield Elementary                | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$8.80                                                            | \$12.69                                                            | \$21.49                                                       | Very Low                                   |
| Burbank Preschool Center             | \$3,185.52                                         | \$45,523.96                                         | \$48,709.49                                    | \$0.07                                                            | \$0.95                                                             | \$1.01                                                        | Low                                        |
| Burckhalter Elementary               | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.27                                                            | \$3.03                                                             | \$3.30                                                        | Very Low                                   |
| Carl Munck Elementary                | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Low                                        |
| Centro Infantil CDC                  | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.13                                                            | \$4.51                                                             | \$7.64                                                        | Very Low                                   |

| OUSD program name             | Annualized investments in access per site, FY 2024 | Annualized investments in quality per site, FY 2024 | Total annualized investments per site, FY 2024 | Daily annualized investments in access per child by site, FY 2024 | Daily annualized investments in quality per child by site, FY 2024 | Daily total annualized investments per child by site, FY 2024 | Child Opportunity Index (education domain) |
|-------------------------------|----------------------------------------------------|-----------------------------------------------------|------------------------------------------------|-------------------------------------------------------------------|--------------------------------------------------------------------|---------------------------------------------------------------|--------------------------------------------|
| East Oakland PRIDE Elementary | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very Low                                   |
| Emerson CDC                   | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$1.93                                                            | \$2.78                                                             | \$4.71                                                        | High                                       |
| EnCompass Academy             | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very Low                                   |
| Esperanza Elementary          | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very Low                                   |
| Franklin Elementary           | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.36                                                            | \$3.98                                                             | \$4.34                                                        | Moderate                                   |
| Fruitvale Elementary          | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.61                                                            | \$5.20                                                             | \$8.81                                                        | Low                                        |
| Garfield Elementary           | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.81                                                            | \$5.49                                                             | \$9.29                                                        | Very Low                                   |
| Glenview Elementary           | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very High                                  |
| Global Family School          | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very Low                                   |
| Greenleaf Elementary          | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very Low                                   |
| Harriet Tubman CDC            | \$36,770.87                                        | \$51,497.49                                         | \$88,268.36                                    | \$4.31                                                            | \$6.04                                                             | \$10.35                                                       | Low                                        |
| Highland CDC                  | \$36,524.06                                        | \$51,250.68                                         | \$87,774.74                                    | \$2.00                                                            | \$2.81                                                             | \$4.81                                                        | Very Low                                   |
| Hintil CDC                    | \$36,133.45                                        | \$50,860.08                                         | \$86,993.53                                    | \$11.73                                                           | \$16.51                                                            | \$28.24                                                       | Low                                        |

| OUSD program name             | Annualized investments in access per site, FY 2024 | Annualized investments in quality per site, FY 2024 | Total annualized investments per site, FY 2024 | Daily annualized investments in access per child by site, FY 2024 | Daily annualized investments in quality per child by site, FY 2024 | Daily total annualized investments per child by site, FY 2024 | Child Opportunity Index (education domain) |
|-------------------------------|----------------------------------------------------|-----------------------------------------------------|------------------------------------------------|-------------------------------------------------------------------|--------------------------------------------------------------------|---------------------------------------------------------------|--------------------------------------------|
| Horace Mann Elementary        | \$3,741.98                                         | \$33,753.86                                         | \$37,495.84                                    | \$0.63                                                            | \$5.70                                                             | \$6.33                                                        | Low                                        |
| Howard/OAK Elementary         | \$35,052.23                                        | \$49,778.86                                         | \$84,831.09                                    | \$9.24                                                            | \$13.13                                                            | \$22.37                                                       | Low                                        |
| International CDC             | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$2.51                                                            | \$3.62                                                             | \$6.14                                                        | Very Low                                   |
| Jefferson CDC                 | \$36,717.58                                        | \$51,444.21                                         | \$88,161.79                                    | \$3.69                                                            | \$5.17                                                             | \$8.86                                                        | Very Low                                   |
| Kaiser Early Childhood Center | \$161,006.40                                       | \$175,733.03                                        | \$336,739.42                                   | \$3.36                                                            | \$3.67                                                             | \$7.03                                                        | Very High                                  |
| La Escuelita Elementary       | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Low                                        |
| Laurel CDC                    | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$2.07                                                            | \$2.98                                                             | \$5.06                                                        | High                                       |
| Lincoln Elementary            | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.55                                                            | \$6.05                                                             | \$6.60                                                        | Moderate                                   |
| Lockwood CDC                  | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.61                                                            | \$5.20                                                             | \$8.81                                                        | Very Low                                   |
| Lockwood STEAM Elementary     | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.52                                                            | \$5.07                                                             | \$8.59                                                        | Very Low                                   |
| Madison Park Academy TK–5     | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very Low                                   |
| Manzanita CDC                 | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$1.60                                                            | \$2.31                                                             | \$3.91                                                        | Low                                        |
| Markham Elementary            | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.39                                                            | \$4.35                                                             | \$4.74                                                        | Very Low                                   |
| Melrose Leadership Academy    | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Low                                        |

| OUSD program name          | Annualized investments in access per site, FY 2024 | Annualized investments in quality per site, FY 2024 | Total annualized investments per site, FY 2024 | Daily annualized investments in access per child by site, FY 2024 | Daily annualized investments in quality per child by site, FY 2024 | Daily total annualized investments per child by site, FY 2024 | Child Opportunity Index (education domain) |
|----------------------------|----------------------------------------------------|-----------------------------------------------------|------------------------------------------------|-------------------------------------------------------------------|--------------------------------------------------------------------|---------------------------------------------------------------|--------------------------------------------|
| MLK Jr. Elementary         | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.06                                                            | \$4.41                                                             | \$7.47                                                        | Low                                        |
| Montclair Elementary       | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.36                                                            | \$3.98                                                             | \$4.34                                                        | Very High                                  |
| OUSD NPS School            | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$6.28                                                            | \$69.60                                                            | \$75.88                                                       | <Null>                                     |
| Piedmont Avenue Elementary | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.55                                                            | \$6.05                                                             | \$6.60                                                        | Very High                                  |
| Prescott Elementary        | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.43                                                            | \$4.95                                                             | \$8.38                                                        | Moderate                                   |
| Reach Elementary           | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.06                                                            | \$4.41                                                             | \$7.47                                                        | Very Low                                   |
| Sankofa United Elementary  | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$3.00                                                            | \$4.32                                                             | \$7.31                                                        | Very High                                  |
| Sequoia Elementary         | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | High                                       |
| Sojourner Truth            | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$2.51                                                            | \$27.84                                                            | \$30.35                                                       | Low                                        |
| Stonehurst CDC             | \$36,608.36                                        | \$51,334.99                                         | \$87,943.34                                    | \$2.09                                                            | \$2.93                                                             | \$5.01                                                        | Very Low                                   |
| Think College Now          | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very Low                                   |
| Thornhill Elementary       | \$2,977.79                                         | \$32,989.68                                         | \$35,967.47                                    | \$0.52                                                            | \$5.80                                                             | \$6.32                                                        | Very High                                  |
| United Nation CDC          | \$34,734.55                                        | \$49,461.18                                         | \$84,195.73                                    | \$1.26                                                            | \$1.80                                                             | \$3.06                                                        | Low                                        |
| Yuk Yau CDC                | \$33,374.98                                        | \$48,101.61                                         | \$81,476.59                                    | \$1.70                                                            | \$2.45                                                             | \$4.14                                                        | High                                       |

Note. CDC = California Kids Investment and Development Savings Program; NPS = nonpublic school.

Source: OUSD FY 2024 invoice data, OUSD FY 2024 enrollment data in PreK and TK programming, Child Opportunity Index data.

## Exhibit C2. FY 2024 Value-Add of OCI Investments in OUSD PreK and TK

| Category | Base daily per-child investment by OUSD* | Total daily OCI investments per Child | Percentage increase | Total daily annualized OCI investments per Child | Percentage increase |
|----------|------------------------------------------|---------------------------------------|---------------------|--------------------------------------------------|---------------------|
| PreK     |                                          |                                       |                     |                                                  |                     |
| Access   | \$94.80*                                 | \$6.47                                | 6.8%                | \$2.06                                           | 2.2%                |
| Quality  |                                          | \$8.57                                | 9.0%                | \$4.16                                           | 4.4%                |
| Total    |                                          | \$15.05                               | 15.9%               | \$6.23                                           | 6.6%                |
| TK       |                                          |                                       |                     |                                                  |                     |
| Access   | \$59.15**                                | \$4.23                                | 7.2%                | \$1.35                                           | 2.3%                |
| Quality  |                                          | \$5.60                                | 9.5%                | \$2.72                                           | 4.6%                |
| Total    |                                          | \$9.83                                | 16.6%               | \$4.07                                           | 6.9%                |

\* This estimate was provided by OUSD for school year 2024–2025 and is based on California State Preschool Program (CSPP) reimbursement rates. OUSD indicated that it is a reliable proxy for school year 2023–2024. It is not inflation adjusted, so it may be higher than actual 2023–2024 investments and, therefore, represents an upper-bound estimate. The percentage increases are, therefore, a lower-bound estimate of the value add of the OCI investments.

\*\* This estimate includes Base Grant per Average Daily Attendance and Grade Span Adjustment for TK–3 provided through California’s Local Control Funding Formula. This number is also inclusive of Universal Transitional Kindergarten funds.

Sources: OUSD FY 2024 invoice data, OUSD FY 2024 enrollment data in PreK and TK programming, OUSD estimates of CSPP funding obtained through an interview with OUSD, and estimates of TK funding from OUSD Budget Department website.

**Exhibit C3. Crosswalk of Oakland Promise (OP) FY 2024 Categories and Developmental Stages of OCI Investments to Departments and Expense Categories**

| Department     | OP expense category                              | Categorization                 | Developmental stage or other   | Overarching category             |
|----------------|--------------------------------------------------|--------------------------------|--------------------------------|----------------------------------|
| Brilliant Baby | Salaries/Wages                                   | Programming                    | Early Childhood                | College Access and Affordability |
| Brilliant Baby | Personnel Benefits                               | Programming                    | Early Childhood                | College Access and Affordability |
| Brilliant Baby | Program Materials, Printing, and Office Supplies | Programming                    | Early Childhood                | College Access and Affordability |
| Brilliant Baby | Staff Travel                                     | Programming                    | Early Childhood                | College Access and Affordability |
| Brilliant Baby | Evaluation and Consultation Services             | Research, Evaluation, and Data | Research, Evaluation, and Data | Research, Evaluation, and Data   |
| Brilliant Baby | Subcontractors                                   | Programming                    | Early Childhood                | College Access and Affordability |
| Brilliant Baby | Miscellaneous/Other/ Occupancy                   | Programming                    | Early Childhood                | College Access and Affordability |
| Brilliant Baby | Support Provider Incentives and Scholarships     | Financial Support              | Early Childhood                | College Access and Affordability |
| Brilliant Baby | Administrative/Indirect Costs                    | Programming                    | Early Childhood                | College Access and Affordability |
| K2C            | Salaries/Wages                                   | Programming                    | Elementary and Middle School   | College Access and Affordability |
| K2C            | Personnel Benefits                               | Programming                    | Elementary and Middle School   | College Access and Affordability |
| K2C            | Program Materials, Printing, and Office Supplies | Programming                    | Elementary and Middle School   | College Access and Affordability |

| Department     | OP expense category                                 | Categorization                 | Developmental stage or other   | Overarching category             |
|----------------|-----------------------------------------------------|--------------------------------|--------------------------------|----------------------------------|
| K2C            | Staff Travel                                        | Programming                    | Elementary and Middle School   | College Access and Affordability |
| K2C            | Evaluation and Consultation Services                | Research, Evaluation, and Data | Research, Evaluation, and Data | Research, Evaluation, and Data   |
| K2C            | Subcontractors                                      | Programming                    | Elementary and Middle School   | College Access and Affordability |
| K2C            | Miscellaneous/Other/<br>Occupancy                   | Programming                    | Elementary and Middle School   | College Access and Affordability |
| K2C            | Support Provider Incentives<br>and Scholarships     | Financial Support              | Elementary and Middle School   | College Access and Affordability |
| K2C            | Administrative/Indirect Costs                       | Programming                    | Elementary and Middle School   | College Access and Affordability |
| College Access | Salaries/Wages                                      | Programming                    | High School                    | College Access and Affordability |
| College Access | Personnel Benefits                                  | Programming                    | High School                    | College Access and Affordability |
| College Access | Program Materials, Printing,<br>and Office Supplies | Programming                    | High School                    | College Access and Affordability |
| College Access | Staff Travel                                        | Programming                    | High School                    | College Access and Affordability |
| College Access | Evaluation and Consultation<br>Services             | Research, Evaluation, and Data | Research, Evaluation, and Data | Research, Evaluation, and Data   |
| College Access | Subcontractors                                      | Programming                    | High School                    | College Access and Affordability |
| College Access | Miscellaneous/Other/<br>Occupancy                   | Programming                    | High School                    | College Access and Affordability |
| College Access | Support Provider Incentives<br>and Scholarships     | Financial Support              | High School                    | College Access and Affordability |

| Department         | OP expense category                              | Categorization                 | Developmental stage or other   | Overarching category             |
|--------------------|--------------------------------------------------|--------------------------------|--------------------------------|----------------------------------|
| College Access     | Administrative/Indirect Costs                    | Programming                    | High School                    | College Access and Affordability |
| College Completion | Salaries/Wages                                   | Programming                    | Postsecondary                  | College Success                  |
| College Completion | Personnel Benefits                               | Programming                    | Postsecondary                  | College Success                  |
| College Completion | Program Materials, Printing, and Office Supplies | Programming                    | Postsecondary                  | College Success                  |
| College Completion | Staff Travel                                     | Programming                    | Postsecondary                  | College Success                  |
| College Completion | Evaluation and Consultation Services             | Research, Evaluation, and Data | Research, Evaluation, and Data | Research, Evaluation, and Data   |
| College Completion | Subcontractors                                   | Programming                    | Postsecondary                  | College Success                  |
| College Completion | Miscellaneous/Other/ Occupancy                   | Programming                    | Postsecondary                  | College Success                  |
| College Completion | Support Provider Incentives and Scholarships     | Financial Support              | Postsecondary                  | College Success                  |
| College Completion | Administrative/Indirect Costs                    | Programming                    | Postsecondary                  | College Success                  |
| Data               | Salaries/Wages                                   | Research, Evaluation, and Data | Research, Evaluation, and Data | Research and Evaluation          |
| Data               | Personnel Benefits                               | Research, Evaluation, and Data | Research, Evaluation, and Data | Research and Evaluation          |
| Data               | Program Materials, Printing, and Office Supplies | Research, Evaluation, and Data | Research, Evaluation, and Data | Research and Evaluation          |
| Data               | Staff Travel                                     | Research, Evaluation, and Data | Research, Evaluation, and Data | Research and Evaluation          |
| Data               | Evaluation and Consultation Services             | Research, Evaluation, and Data | Research, Evaluation, and Data | Research and Evaluation          |
| Data               | Subcontractors                                   | Research, Evaluation, and Data | Research, Evaluation, and Data | Research and Evaluation          |
| Data               | Miscellaneous/Other/ Occupancy                   | Research, Evaluation, and Data | Research, Evaluation, and Data | Research and Evaluation          |



| Department     | OP expense category                              | Categorization                                           | Developmental stage or other                             | Overarching category                                     |
|----------------|--------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------|
| <b>Data</b>    | Support Provider Incentives and Scholarships     | Financial Support                                        | Research, Evaluation, and Data                           | Research and Evaluation                                  |
| <b>Data</b>    | Administrative/Indirect Costs                    | Research, Evaluation, and Data                           | Research, Evaluation, and Data                           | Research and Evaluation                                  |
| <b>Finance</b> | Salaries/Wages                                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Finance</b> | Personnel Benefits                               | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Finance</b> | Program Materials, Printing, and Office Supplies | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Finance</b> | Staff Travel                                     | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Finance</b> | Evaluation and Consultation Services             | Research, Evaluation, and Data                           | Research, Evaluation, and Data                           | Research, Evaluation, and Data                           |
| <b>Finance</b> | Subcontractors                                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Finance</b> | Miscellaneous/Other/ Occupancy                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Finance</b> | Support Provider Incentives and Scholarships     | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Finance</b> | Administrative/Indirect Costs                    | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |

| Department            | OP expense category                              | Categorization                                           | Developmental stage or other                             | Overarching category                                     |
|-----------------------|--------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------|
| <b>Communications</b> | Salaries/Wages                                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Personnel Benefits                               | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Program Materials, Printing, and Office Supplies | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Staff Travel                                     | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Evaluation and Consultation Services             | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Subcontractors                                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Miscellaneous/Other/ Occupancy                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Support Provider Incentives and Scholarships     | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>Communications</b> | Administrative/Indirect Costs                    | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| <b>CPO</b>            | Salaries/Wages                                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |

| Department | OP expense category                              | Categorization                                           | Developmental stage or other                             | Overarching category                                     |
|------------|--------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------|
| CPO        | Personnel Benefits                               | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| CPO        | Program Materials, Printing, and Office Supplies | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| CPO        | Staff Travel                                     | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| CPO        | Evaluation and Consultation Services             | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| CPO        | Subcontractors                                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| CPO        | Miscellaneous/Other/ Occupancy                   | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| CPO        | Support Provider Incentives and Scholarships     | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |
| CPO        | Administrative/Indirect Costs                    | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure | Community Partner Programming and Partner Infrastructure |

Source: FY 2024 OP invoice data.

**Exhibit C4. FY 2024 ZIP Code-Level Investments of OCI Investments in Oakland Promise (OP), by Program and Investment Category**

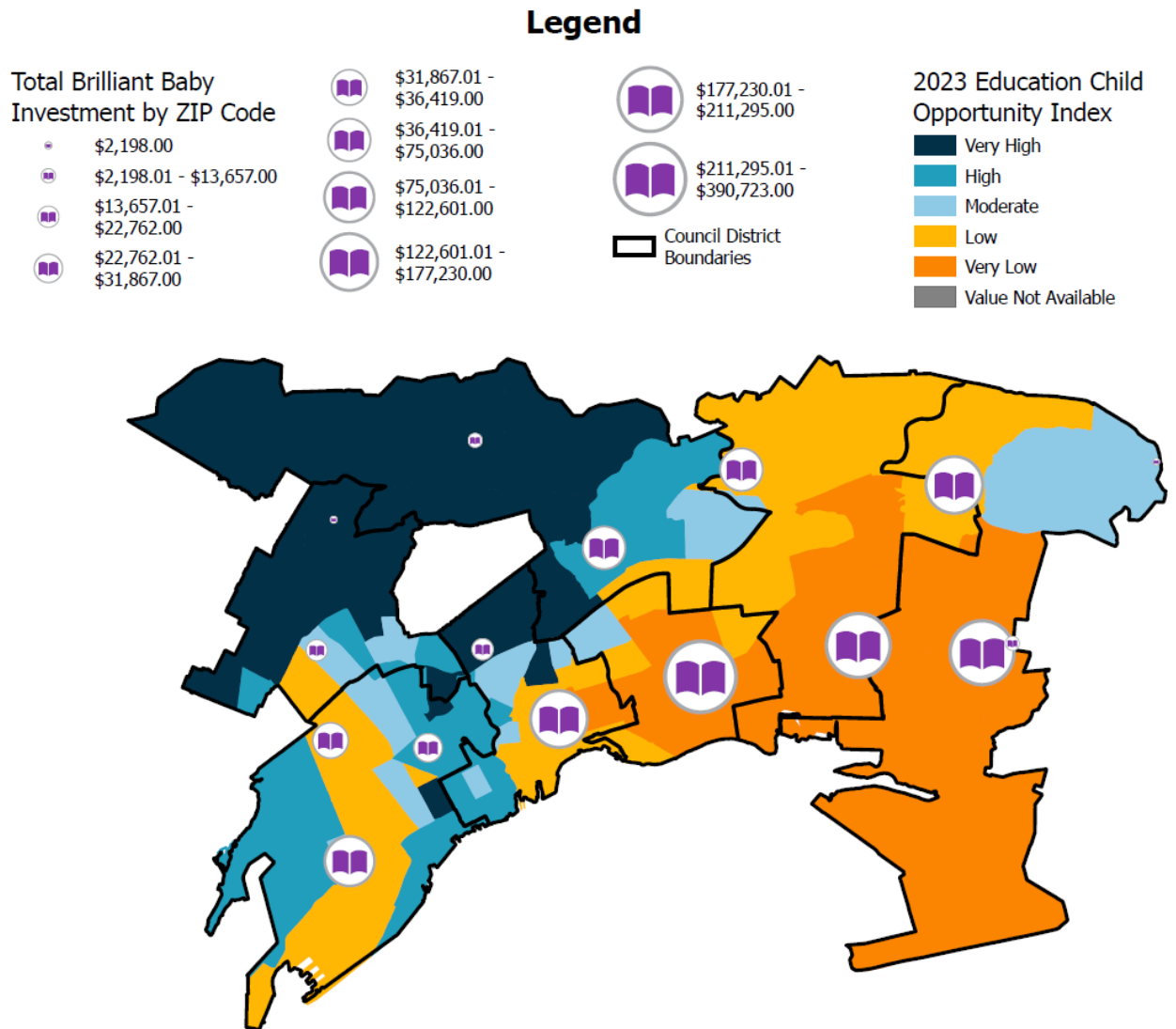
| ZIP code | Brilliant Baby                |                                               | K2C                           |                                               | BB + K2C                      | BB + K2C                                      |
|----------|-------------------------------|-----------------------------------------------|-------------------------------|-----------------------------------------------|-------------------------------|-----------------------------------------------|
|          | Financial support investments | Financial support and programming investments | Financial support investments | Financial support and programming investments | Financial support investments | Financial support and programming investments |
| 94131    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94501    | \$2,106                       | \$6,750                                       | \$975                         | \$1,720                                       | \$3,081                       | \$8,470                                       |
| 94509    | \$686                         | \$2,198                                       | \$325                         | \$573                                         | \$1,011                       | \$2,771                                       |
| 94531    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94541    | \$1,421                       | \$4,552                                       | \$650                         | \$1,147                                       | \$2,070                       | \$5,699                                       |
| 94565    | \$686                         | \$2,198                                       | \$325                         | \$573                                         | \$1,011                       | \$2,771                                       |
| 94577    | \$2,841                       | \$9,105                                       | \$650                         | \$1,147                                       | \$3,491                       | \$10,252                                      |
| 94578    | \$686                         | \$2,198                                       | \$1,624                       | \$2,867                                       | \$2,310                       | \$5,064                                       |
| 94579    | \$686                         | \$2,198                                       | \$325                         | \$573                                         | \$1,011                       | \$2,771                                       |
| 94580    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94587    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94589    | NA                            | NA                                            | \$650                         | \$1,147                                       | \$650                         | \$1,147                                       |
| 94591    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94601    | \$121,932                     | \$390,723                                     | \$75,362                      | \$133,014                                     | \$197,294                     | \$523,737                                     |
| 94602    | \$20,575                      | \$65,932                                      | \$45,153                      | \$79,694                                      | \$65,728                      | \$145,625                                     |
| 94603    | \$61,676                      | \$197,638                                     | \$59,121                      | \$104,347                                     | \$120,797                     | \$301,985                                     |
| 94605    | \$55,308                      | \$177,230                                     | \$56,847                      | \$100,334                                     | \$112,154                     | \$277,564                                     |
| 94606    | \$48,204                      | \$154,468                                     | \$47,426                      | \$83,707                                      | \$95,631                      | \$238,175                                     |
| 94607    | \$38,260                      | \$122,601                                     | \$22,089                      | \$38,987                                      | \$60,349                      | \$161,588                                     |

| ZIP code | Brilliant Baby                |                                               | K2C                           |                                               | BB + K2C                      | BB + K2C                                      |
|----------|-------------------------------|-----------------------------------------------|-------------------------------|-----------------------------------------------|-------------------------------|-----------------------------------------------|
|          | Financial support investments | Financial support and programming investments | Financial support investments | Financial support and programming investments | Financial support investments | Financial support and programming investments |
| 94608    | \$11,365                      | \$36,419                                      | \$17,216                      | \$30,387                                      | \$28,582                      | \$66,806                                      |
| 94609    | \$5,683                       | \$18,210                                      | \$21,114                      | \$37,267                                      | \$26,797                      | \$55,476                                      |
| 94610    | \$7,103                       | \$22,762                                      | \$17,541                      | \$30,960                                      | \$24,645                      | \$53,722                                      |
| 94611    | \$4,262                       | \$13,657                                      | \$26,312                      | \$46,440                                      | \$30,574                      | \$60,097                                      |
| 94612    | \$9,945                       | \$31,867                                      | \$12,669                      | \$22,360                                      | \$22,613                      | \$54,227                                      |
| 94618    | \$686                         | \$2,198                                       | \$12,669                      | \$22,360                                      | \$13,355                      | \$24,558                                      |
| 94619    | \$23,416                      | \$75,036                                      | \$33,133                      | \$58,480                                      | \$56,550                      | \$133,517                                     |
| 94621    | \$65,938                      | \$211,295                                     | \$70,490                      | \$124,414                                     | \$136,428                     | \$335,709                                     |
| 94622    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94702    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94705    | NA                            | NA                                            | \$1,299                       | \$2,293                                       | \$1,299                       | \$2,293                                       |
| 94803    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94805    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 94806    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 95340    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 96405    | NA                            | NA                                            | \$325                         | \$573                                         | \$325                         | \$573                                         |
| 9467     | \$686                         | \$2,198                                       | NA                            | NA                                            | \$686                         | \$2,198                                       |
| 94063    | \$686                         | \$2,198                                       | NA                            | NA                                            | \$686                         | \$2,198                                       |
| 94118    | \$686                         | \$2,198                                       | NA                            | NA                                            | \$686                         | \$2,198                                       |
| 94544    | \$686                         | \$2,198                                       | NA                            | NA                                            | \$686                         | \$2,198                                       |
| 94546    | \$686                         | \$2,198                                       | NA                            | NA                                            | \$686                         | \$2,198                                       |

| ZIP code | Brilliant Baby                |                                               | K2C                           |                                               | BB + K2C                      | BB + K2C                                      |
|----------|-------------------------------|-----------------------------------------------|-------------------------------|-----------------------------------------------|-------------------------------|-----------------------------------------------|
|          | Financial support investments | Financial support and programming investments | Financial support investments | Financial support and programming investments | Financial support investments | Financial support and programming investments |
| 94804    | \$1,421                       | \$4,552                                       | NA                            | NA                                            | \$1,421                       | \$4,552                                       |
| 95304    | \$686                         | \$2,198                                       | NA                            | NA                                            | \$686                         | \$2,198                                       |
| 95815    | \$686                         | \$2,198                                       | NA                            | NA                                            | \$686                         | \$2,198                                       |

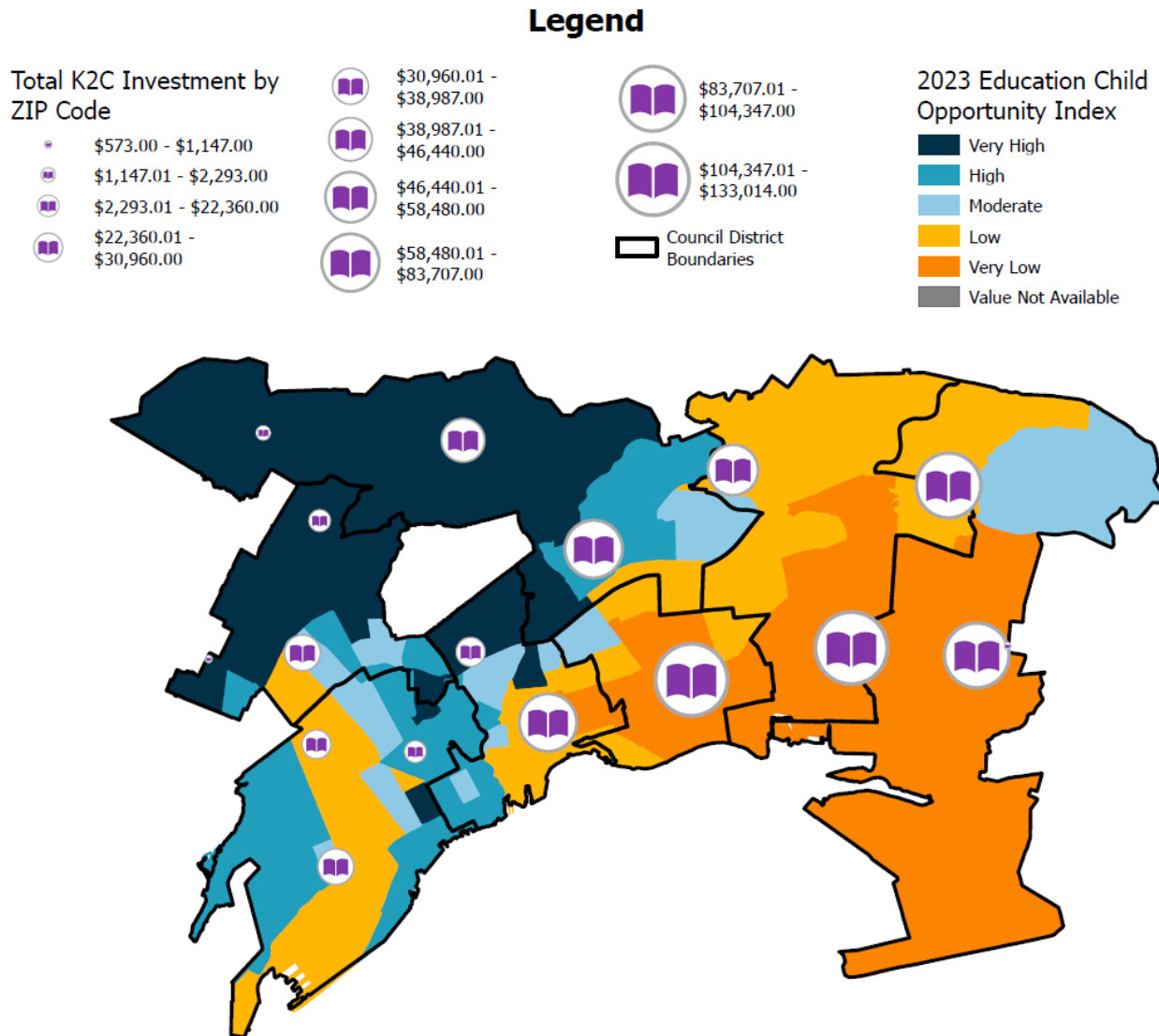
Source: OP FY 2024 Supplementary Results-Based Accountability Metric Data Tables.

## Exhibit C5. Oakland Promise (OP) FY 2024 OCI Investments in Brilliant Baby, by ZIP Code of Recipient



Source: OP FY 2024 Supplementary Results-Based Accountability Metric Data Tables and Child Opportunity Index data.

## Exhibit C6. Oakland Promise (OP) FY 2024 OCI Investments in K2C, by ZIP Code of Recipient



Source: OP FY 2024 Supplementary Results-Based Accountability Metric Data Tables and Child Opportunity Index data.



### Exhibit C7. Early Education Fund Results-Based Accountability (RBA) Measures, by Fiscal Year

| Performance measure                                                                                                          | Category      | Frequency | January–June 2023 | RBA measures FY 2023–2024 (grand total) | RBA measures FY 2023–2024 (COECFS) | RBA measures FY 2023–2024 (OUSD) |
|------------------------------------------------------------------------------------------------------------------------------|---------------|-----------|-------------------|-----------------------------------------|------------------------------------|----------------------------------|
| Number of free and subsidized slots by program type                                                                          | Affordability | Annual    | 2,660             | 2,815                                   | 52                                 | 2,763                            |
| Number of children enrolled in priority partner sites (OUSD and COECFS)                                                      | Access        | Annual    | 1,943             | 2,062                                   | 19                                 | 2,043                            |
| Number of early childhood education (ECE) educators and staff                                                                | Access        | Annual    | 244               | 261                                     | 7                                  | 254                              |
| Additional capacity from OCI-funded capital infrastructure improvements                                                      | Access        | Annual    | 66                | 0                                       | 0                                  | 0                                |
| Number and percentage of sites receiving OCI-funded capital infrastructure improvements                                      | Quality       | Annual    | 2%                | 10%                                     | 0%                                 | 6 (11%)                          |
| Average number of hours that ECE educators and staff participated in training/coaching and professional learning communities | Quality       | Annual    | N/A               | 31.7                                    | 35.2                               | 31.6                             |
| Percentage of free and subsidized slots enrolled (uptake)                                                                    | Access        | Annual    | 73%               | 73%                                     | 37%                                | 74%                              |
| Retention rate for ECE educators and staff                                                                                   | Quality       | Annual    | N/A               | 89%                                     | 67%                                | 90%                              |
| Number and percentage of ECE educators and staff who reported the quality of trainings were good or very good                | Quality       | Annual    | N/A               | N/A                                     | N/A                                | 356 (94%)                        |

| Performance measure                                                                                                          | Category       | Frequency | January–June 2023 | RBA measures FY 2023–2024 (grand total) | RBA measures FY 2023–2024 (COOECFS) | RBA measures FY 2023–2024 (OUSD) |
|------------------------------------------------------------------------------------------------------------------------------|----------------|-----------|-------------------|-----------------------------------------|-------------------------------------|----------------------------------|
| Number and percentage of children enrolled in an improved ECE facility due to OCI-funded capital infrastructure improvements | Access/Quality | Annual    | 81 (4%)           | 374 (18%)                               | 0                                   | 374 (18%)                        |
| Percentage of OCI sites with a quality rating above standard                                                                 | Access/Quality | Annual    | 100%              | 100%                                    | 100%                                | 100%                             |

#### Exhibit C8. College Access Results-Based Accountability (RBA) Measures by Fiscal Year

| Performance measure                                                                                                                                                                                                | Category | Frequency | Baseline FY 2023 data                                  | New data FY 2024                                            | Notes                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|--------------------------------------------------------|-------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Number of Medi-Cal eligible children aged 0–23 months signed up for \$500 college savings account scholarships and percentage of children enrolled compared with annual eligible population                        | NA       | Annual    | 445 children enrolled, or 27.8% of eligible population | 692 children enrolled, or 43.25% of the eligible population | Eligible population estimated at approximately 1,600 births for Medi-Cal eligible babies born in Oakland. |
| Number of children enrolled for up to \$500 in early college scholarships by the end of 9th grade annually and percentage annual change in number of children enrolled                                             | NA       | Annual    | 638 children enrolled                                  | 1,627 children enrolled (155% increase)                     |                                                                                                           |
| Number of Oakland 12th graders who were awarded scholarships for postsecondary education and total amount of scholarship funds awarded annually to Oakland Promise (OP) scholars for their postsecondary education | NA       | Annual    | 909 scholarships awarded, for a total of \$3,648,300   | 1,170 scholarships awarded, for a total of \$4,582,000      | Students who were awarded AND who accepted their OP scholarships.                                         |

| Performance measure                                                                                                                                                  | Category               | Frequency | Baseline FY 2023 data                                                                                                                            | New data FY 2024                              | Notes                                                                                                                                                                                                                                                                              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Number of Medi-Cal eligible caregivers of children aged 0–23 months receiving financial coaching and percentage of eligible families who received financial coaching | NA                     | Annual    | 387 caregivers, or 86.9% of eligible families                                                                                                    | 387 caregivers, or 67.3% of eligible families | Defined at program entry date. This means 387 caregivers signed up for financial coaching at time of Brilliant Baby enrollment. Some families were put on a waitlist if coaches were not immediately available, but all families received at least one financial coaching session. |
| Number of Oakland caregivers and public school students participating in college and career identity-building programming                                            | NA                     | Annual    | 5,505 caregivers and students (see notes for context)                                                                                            | 16,858                                        | Because much of our current data infrastructure was not in place in FY 2023, this estimate is based on our best available data from that time.                                                                                                                                     |
| Number of OP scholars receiving postsecondary education persistence support                                                                                          | NA                     | Annual    | 1,458 scholars                                                                                                                                   | 1,981 scholars                                | Defined as students who received a scholarship check during the fiscal year.                                                                                                                                                                                                       |
| Percentage of enrolled Medi-Cal eligible caregivers of children aged 0–23 months who reported having a college-bound identity for their children                     | College-bound identity | Annual    | New metric as of August 2023. Surveys were launched on September 15, 2023. Therefore, baseline data for this metric are unavailable for FY 2023. | 83.69%                                        |                                                                                                                                                                                                                                                                                    |

| Performance measure                                                                                                                         | Category                                  | Frequency | Baseline FY 2023 data                                                                                                                      | New data FY 2024                               | Notes                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|-----------|--------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Percentage of Oakland Unified School District (OUSD) students participating in OP programming who demonstrate a college-bound identity      | College-bound identity                    | Annual    | New metric as of August 2023. Therefore, baseline data for this metric are unavailable for FY 2023.                                        | 69.55%                                         |                                                                                                                    |
| Total amount of scholarship funds distributed annually to OP scholars for their postsecondary education                                     | Post-secondary affordability              | Annual    | \$2,193,883                                                                                                                                | \$2,523,352                                    | Amount of scholarship payments distributed to all active postsecondary scholars in the College Completion program. |
| Impact of OP funds on the postsecondary education affordability for OP scholars                                                             | Post-secondary affordability              | Annual    | New metric as of August 2023. Therefore, baseline data for this metric are unavailable for FY 2023.                                        | Refer to metric for qualitative data.          |                                                                                                                    |
| Postsecondary education enrollment rate for OP scholars compared with OUSD graduates broadly and the national postsecondary enrollment rate | Post-secondary enrollment and persistence | Annual    | 86.6% OP scholar enrollment rate compared with 49.5% OUSD enrollment rate; 52.4% national rate for students coming from low-income schools | 83.3% (2023 scholars) compared with 54.9% OUSD | National comparison data come from the National Student Clearinghouse High School Benchmark Report, 2023.          |
| Year 1 to Year 2 persistence rate for OP scholars in postsecondary education                                                                | Post-secondary enrollment and persistence | Annual    | 83.4% OP scholar persistence rate                                                                                                          | 87.14% OP scholar persistence rate             | For FY 2024 RBA reporting, persistence rates were reported for fall 2022 to fall 2023 semesters.                   |

| Performance measure                                                                                                                                                   | Category                                  | Frequency     | Baseline FY 2023 data                                                                                                                                                                       | New data FY 2024                    | Notes                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Postsecondary education completion rate for OP scholars compared with OUSD graduates broadly and the national postsecondary completion rate for the same class</b> | Post-secondary enrollment and persistence | Annual        | 54% OP scholar completion rate compared with 34% OUSD completion rate 29.2% national rate for students coming from low-income schools                                                       | 51.2% compared with 28.45% for OUSD | FY 2023 baseline data are for the class of 2016. Comparison data are from the graduating class of OUSD students; the national data come from the National Student Clearinghouse High School Benchmark Report, 2023. For FY 2024 RBA reporting, completion rates are reported for the fall 2017 cohorts. |
| <b>Postsecondary education completion rate for all OUSD graduates</b>                                                                                                 | Post-secondary enrollment and persistence | Every 2 years | These data are not available on the California Department of Education website. They only track postsecondary enrollment rates. Therefore, this metric is unavailable for FY 2023 baseline. | These data are not yet available.   | This is the population-level change metric, so short-term change is not expected. It represents the “north star” for OP’s work. Citywide data from all Oakland public schools are not yet available, and OP is building the partnerships and infrastructure needed to obtain them.                      |

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# Oakland Children's Initiative Impact Evaluation Plan

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Hans Bos, Gabriele Fain, and Isaac Kaplan

**JUNE 2026**



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## Executive Summary

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This report presents an evaluation design for an impact evaluation of the Oakland Children’s Initiative (OCI, “the Initiative”). OCI aims to advance equitable outcomes from early childhood through college completion by expanding access to high-quality early childhood education (ECE), improving college access, and increasing college success. Supported by an annual parcel tax generating approximately \$30 million each year for 30 years, OCI began implementation in January 2023.

The impact evaluation seeks to determine whether OCI improves ECE access and quality, enhances college readiness and completion, reduces financial barriers to college, and strengthens system alignment and collaboration.

The research questions underlying the impact evaluation fall into the following categories:

- **System-level impact**—How does OCI affect the service infrastructure for children, youth, and families in Oakland, as well as collaboration and coordination among providers?
- **Service reach**—Does OCI increase awareness of, access to, and participation in ECE and college access services?
- **Child, youth, and family outcomes**—How does OCI influence child and family well-being, educational aspirations, academic outcomes, and college success?
- **Equity**—Does OCI increase equity in access to high-quality ECE and college success by reducing gaps by neighborhood, income group, and race or ethnicity?
- **Facilitators and barriers**—What factors support or hinder OCI’s success?

The evaluation design will rely on documenting change over time (using longitudinal data) and making comparisons across different geographic areas or groups (using cross-sectional data) to isolate and identify the unique impact of OCI. Such an evaluation design is known as a difference-in-differences (DiD) design and is widely used to evaluate community-based initiatives like OCI.

The design is strengthened by (a) combining administrative outcome data with survey data, (b) using representative samples and data sources, and (c) collecting data repeatedly for enough time to cover both short- and longer-term outcomes. It is challenging to precisely capture what would have happened without OCI. By measuring impact across different data sources and at different levels (family, organization, community), the impact evaluation becomes stronger and more robust in the context of other things happening in Oakland at the same time as OCI.

This report presents a detailed approach to gathering and using three different types of outcome data: administrative outcomes data, a staff survey, and a multi-cohort population survey of families and students in Oakland. The administrative data include, for example, data on the availability of ECE options in different neighborhoods, the kindergarten readiness of children first entering Oakland Unified School District (OUSD) or charter school classrooms, academic outcomes in later grades, and college enrollment and completion outcomes for OUSD graduates. Comparing these outcomes over time and across jurisdictions within and outside of Oakland creates a strong framework for capturing the longer-term outcomes of OCI.

The surveys (of staff and families) complement these administrative outcome data by capturing the more immediate changes in outcomes that are harder to measure with administrative data, such as changes in the types of ECE parents choose, the enrollment challenges and waitlists they encounter (including, for example, hours of operation or transportation issues), the educational aspirations and expectations they have for their children, and the ability of high school students to successfully prepare for college. Staff surveys can capture how the additional OCI funding helps providers, teachers, and counselors do their work better. Together, these data collection efforts and the analyses they support will help the City of Oakland evaluate the effectiveness of OCI and showcase the benefits of OCI's added resources to the community.

The report concludes by describing how an evaluation like this could be implemented across several distinct 2-year phases to align with the evaluation requirements included in the OCI Ordinance. Although the effects of OCI on Oakland's children and families will manifest many years into the future, it is important to begin capturing OCI's impacts now to take advantage of available historical data and to establish baseline trends against which to compare future outcomes.

Lastly, please note that all the data collection activities called for in this report will require the support and partnership of many agencies and individuals in Oakland, Alameda County, and elsewhere. We do not take those partnerships for granted. To deliver on the promise of a useful and rigorous impact evaluation of OCI, it is necessary to authentically engage families, educators, government agencies, and community partners with openness and humility so that they recognize themselves in this work and see how this evaluation will move OCI forward and will benefit their children and the larger community.

## Overview

The Oakland Children’s Initiative (OCI, or “the Initiative”; Measure AA) is a 2018 charter amendment expanding and enhancing access to quality early childhood education (ECE) and promoting postsecondary education completion, prioritizing children, youth, and families with the highest needs. OCI is designed to reduce disparities in educational access and quality experienced by Oakland families with low incomes and those furthest from opportunity (see text box for additional details). The Initiative is projected to raise approximately \$30 million annually for 30 years through a voter-approved parcel tax.

Following initial legal challenges that delayed implementation, the City Council approved Implementation Partners (IPs) for the Initiative in late 2022, and funding was authorized in January 2023 retroactively.

The City of Oakland Charter outlines 5-year guidelines that identify requirements for each of the Initiative’s two funding streams—the Early Education Fund and the Oakland Promise Fund (referred to as the College Access Fund in this report)—and guide the funds’ strategic investments.

The City of Oakland contracted with the American Institutes for Research (AIR) and its partner RDA Consulting to conduct a 2-year evaluation of OCI, as required by the Initiative’s ordinance. The evaluation consists of three components: (a) a process study to examine OCI implementation, (b) an economic impact study, and (c) the development of an impact study design of OCI.

Building on what we learned from the City of Oakland OCI Accountability Officer and the OCI Implementation Partners, this report presents an impact evaluation design for the Initiative. After introducing the Initiative, its purpose, and the objectives for this impact evaluation, we list the five research questions for the impact evaluation and describe the options for the impact study design, including sampling and data collection considerations. The plan also discusses how the OCI impact study will complement the OCI process study and economic impact study.

The [OCI Ordinance](#) details the goals and priorities for the two OCI funds. The **Early Education Fund** prioritizes 4-year-old children from families with low incomes and/or those who are in high need (followed by 3-year-old children in these groups). This fund is intended to increase overall attainment and reduce socioeconomic and/or demographic disparities in educational outcomes.

The **College Access Fund** prioritizes Oakland public school students and aims to reduce socioeconomic and/or demographic disparities in educational outcomes, such as those related to wealth and income, from an early age. It prioritizes students from low-income backgrounds and/or traditionally underrepresented groups in college.

The report reflects discussions with and feedback from OCI’s implementing partners: Oakland Promise and First 5 Alameda County.

## About the Oakland Children’s Initiative

OCI aims to advance equitable outcomes from early childhood through postsecondary completion. By investing in access to and expansion of high-quality ECE and college access and success services, OCI works to increase educational, economic, and workforce opportunities for Oakland’s children, youth, and families. OCI is a community-driven initiative and is focused on responding to the needs of Oakland’s children, youth, and families.

The OCI framework recognizes that opportunity is built over time and that families are essential partners in that journey. The Initiative focuses on building a connected educational pathway by expanding access to quality preschool and early learning, strengthening family engagement and support, and advancing postsecondary enrollment, affordability, persistence, and graduation, helping children and youth thrive at every stage of their educational experience. OCI also invests in building a stable, qualified, and diverse workforce to support progress toward these goals.

Through sustained public investment and strong local partnerships, OCI is intended to align schools, community organizations, and service providers to ensure resources are leveraged, coordinated, culturally responsive, and grounded in community voice. Over time, this approach is designed to support lasting, equitable systems change, helping to create a future where every child and family in Oakland has the opportunity to succeed and contribute to a thriving community.

OCI includes the **Early Education Fund** and the **College Access Fund**.<sup>1</sup> Each fund is managed by a designated Implementation Partner (IP) that collaborates with a broader ecosystem of service providers. Each IP is a city-contracted entity responsible for managing and deploying OCI funds and supporting implementation of the Initiative’s strategies in alignment with the voter-approved City Charter, 5-year guidelines for the Initiative, and shared results-based accountability (RBA) measures. IPs are selected through an authorized city-administered approval process, including review by City Council and the Children’s Initiative Oversight Commission.

Acting as fund managers on behalf of the City of Oakland, IPs implement OCI investments directly and/or through subcontracts. This structure supports timely and streamlined distribution of funds while maintaining alignment with the City’s oversight and accountability

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<sup>1</sup> This fund is technically referred to as the Oakland Promise Fund in the OCI Ordinance. For the purposes of this report, we refer to this fund as the College Access Fund.

framework. IPs are responsible for building and administering program funds, managing subcontracted services, monitoring contractor performance, and coordinating implementation in accordance with the Initiative’s guidelines and strategic objectives supported by the OCI Accountability Officer.

**First 5 Alameda County** serves as the Implementation Partner for the Early Education Fund of OCI, which represents approximately two thirds of OCI funding. First 5 Alameda County is a public agency working to ensure every child, regardless of race, income or neighborhood, has a strong start in life. First 5 is focused on aligning public funding, partners, and data to build an integrated, equity-centered early childhood system that supports the whole child, whole family, and whole community. Together with partners, First 5 is working to move beyond fragmented early childhood services toward a coordinated system so that every child enters kindergarten ready to learn and thrives beyond.

As an IP, First 5 Alameda County leads and coordinates OCI planning, facilitates public system partnerships, and provides support to the Early Education Priority Partners. OCI requires First 5 Alameda to prioritize two public partners: Oakland Unified School District (OUSD) and the City of Oakland Early Childhood and Family Services (COOECFS) program. OCI must be used to reach “capacity”<sup>2</sup> with OUSD and COOECFS before the Initiative invests in the broader early childhood mixed-delivery system.

OUSD’s early learning program offers prekindergarten and transitional kindergarten services. COOECFS provides Early Head Start and Head Start programming, serving families who meet federal eligibility guidelines. The fund, via OCI 5-Year Guidelines, prioritizes 4-year-old children from families with low incomes and/or those with high needs (followed by 3-year-old children in these groups).

First 5 Alameda considers itself a strategic systems builder that aligns and integrates multiple public early childhood investments and partnerships across Oakland and Alameda County. In addition to OCI, First 5 Alameda administers countywide investments made with funding through Measure C, a voter-approved initiative similar to OCI but focused entirely on sustaining and improving the early childhood system in Alameda County. Through its involvement in these initiatives, First 5 Alameda aims to build and coordinate an effective cross-sector

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<sup>2</sup> The Measure AA ordinance indicates that “First funding shall be given to public agencies to expand public programs in all areas of the City that meet a baseline quality level and can accommodate more children using empty classrooms and/or filling vacancies, particularly programs at OUSD and City of Oakland Head Start. This could include converting part-day OUSD preschool to full-day OUSD preschool at OUSD sites, hiring additional OUSD staff, or expanding the hours of service to better meet the needs of working families, subject to capacity limitations determined by OUSD and the City of Oakland Head Start in consultation with the Implementation Partner. After OUSD and Head Start sites have reached agreement with the Implementation Partner on ensuring funding to reach capacity as outlined above, the Early Education Fund may contract with private nonprofit agencies that show a commitment to and interest in serving low-income children.”

implementation infrastructure that supports long-term systems alignment and sustainability in the ECE field across Alameda County.

**Oakland Promise** is the Implementation Partner for the College Access Fund of OCI and receives approximately one third of the OCI funding. Oakland Promise's mission is to advance equity and economic mobility for Oakland students by supporting their successful completion of postsecondary education. Originally formed in 2016 (and merged with the East Bay College Fund in 2019), Oakland Promise is a nonprofit agency focused on providing every child in Oakland with financial resources, programming, and educational opportunities, beginning from birth, to access, persist, and succeed in postsecondary programming, including college and career and technical education. Oakland Promise aligns and braids city, state, federal, and philanthropic funding into a single, place-based strategy focused on improving outcomes for children and families.

As the College Access Fund IP, Oakland Promise is focused on building and coordinating postsecondary access, persistence, completion, and economic mobility infrastructure in Oakland. In this role, Oakland Promise leads strategy, manages investments, coordinates a network of more than 30 community-based organizations, and supports systems alignment across schools, community partners, and postsecondary institutions. Together, these efforts expand cradle-to-career support for Oakland students and families, including college and career and technical education access, financial resources, scholarships, advising, and persistence support. In addition to coordinating the work of community partners, Oakland Promise also provides direct services to students and families.

The College Access Fund prioritizes support for public school students from low-income backgrounds and/or those traditionally underrepresented in college. The City requires that at least 25% of Oakland Promise's eligible subcontracted service dollars are directed to small and/or local businesses, strengthening both educational opportunity and Oakland's local economy. Direct financial support to students and families, including scholarships and college savings deposits, are excluded from this calculation.

## **Purpose of the OCI Impact Evaluation**

OCI is a place-based strategy funded by a local parcel tax that aims to reduce disparities in educational access and quality, with a priority on children, youth, and families furthest from opportunity, by focusing on expanding and enhancing access to high-quality early care and education (ECE), promoting college access and completion, and strengthening the overall systems that support ECE and college access. Well-designed and well-integrated programs and services in these areas are known to have substantial benefits for children and their communities (e.g., Bryan et al., 2017; Edmunds et al., 2017; Heckman & Masterov, 2007), which

often makes these interventions highly cost-effective (see Escueta et al., 2026, for a more extensive discussion of how this would play out in Oakland). When coordinated among a network of organizations, place-based strategies like OCI that provide comprehensive supports for children, youth, and families are considered by many researchers to be the only intervention models that can create and support lasting structural social change (e.g., Flood et al., 2015; Kania & Kramer, 2011). Government agencies and philanthropic foundations have supported these models in communities across the United States. Prominent examples include the Kalamazoo Promise (and its many spinoffs), the Urban Health initiative (Robert Wood Johnson Foundation), the Birth through Eight Strategy for Tulsa (BEST; George Kaiser Family Foundation), the Road Map Project (Seattle Foundation), and the Get Ready Guilford initiative (The Duke Endowment).

Impact evaluation evidence about other place-based initiatives like OCI has not always been conclusive or positive. In some cases, evaluators concluded that the initiative's resources were not focused enough to make a meaningful difference in addressing the wide array of problems grantees sought to address (e.g., Wilson et al., 2007). In other cases, community stakeholders and institutions were not ready to use the initiative's resources effectively because of competing priorities or unresolved individual or institutional rivalries (e.g., Butterfoss & Kegler, 2002; Rosen et al., 2022). Also, past impact studies of place-based strategies were often not optimally designed to capture the full benefits of the investments that were made. For example, some impact studies were too short in duration to capture the distal outcomes of these initiatives, others did not measure all the relevant outcomes, and still others could not identify an appropriate counterfactual to evaluate what would have happened in the absence of the initiative. Properly evaluating an intervention like OCI is challenging because the "intervention" is not precisely defined and the full range of outcomes is difficult to measure. In addition, the community-wide and phased rollout of these initiatives eliminates many of the study designs that are preferred by (and familiar to) evaluators, which have a clearly identified "no-service" control group (see Hollister & Hill, 1995; Lin et al., 2015; Osher et al., 2015, for examples and a discussion of these methodological challenges). So, the challenge is that traditional impact evaluation designs do not neatly address the evaluation needs of large community initiatives like OCI. In this report, we take on this challenge and develop an evaluation design and associated data collection strategies that will allow the City of Oakland to reliably capture OCI's impact over time.

OCI funds services that begin early in children's lives and extend through college completion. These include college savings accounts and financial coaching; high-quality preschool programming, including workforce development and support; parent referrals to needed and desired services; college readiness supports and "college-going mindset" programming; mentoring and academic advising; scholarships; and other related services. In addition to investing in direct services, OCI aims to help early childhood; transitional kindergarten through



Grade 12 (TK–12); college; and related systems to collaborate more effectively and to create an integrated and continuous set of supports for children, youth, and families in Oakland. These supports are designed to increase equity, eliminate barriers, improve transitions, and increase the effectiveness and efficiency of service delivery. Like other place-based initiatives, OCI's success depends on the collaboration of many partners and the synergy resulting from such collaboration.

The first goal of the impact evaluation is to measure the outcomes and impact of OCI on children. That is, the purpose of the evaluation is to determine whether OCI creates changes that support the Initiative's overarching goals, which are to (a) expand access to and quality of early childhood education; (b) improve college access, retention, persistence and graduation, as well as career readiness; (c) reduce financial barriers to college; and (d) align preschool, TK–12, and postsecondary education systems (a full description of the Measure AA ordinance, including its goals, is available [here](#)). In addition to measuring the impact of OCI at the child, student, and family level, it is important to track OCI processes and activities at the system level to measure the impact of OCI on the underlying systems and infrastructure that manage, support, and coordinate these investments.

## Impact Evaluation Questions

Five overarching evaluation questions will guide the impact evaluation. The first four questions capture the effects of OCI on service infrastructure, service reach, parental outcomes, child and student outcomes, and community development. The fifth question captures facilitators and barriers to OCI implementation and service delivery, as well as OCI's ability to positively change the trajectory of child and family outcomes. Across all research questions, the impact evaluation must explicitly address OCI's impact on equity in Oakland. Does the Initiative reduce preexisting gaps in access to services, service use, and child and youth outcomes that currently exist between different neighborhoods and communities in the city?

1. **How does OCI affect the implementing partners and the larger service infrastructure for young children, families, and students in Oakland?**
  - a. **Structural changes.** How does OCI change the early care and education and high school-to-college service infrastructures in Oakland to better support the workforce, increase access to early learning opportunities, improve college access supports, and better serve families and students?
  - b. **Collaboration.** How does OCI change communication, coordination, and collaboration among its partners and between its partners and the larger education service community in Oakland to lower barriers, improve transitions, and reduce unnecessary burden on families and service providers?



## 2. How does OCI impact participation in services among Oakland’s children and families?

- a. **Service reach.** Does OCI increase access to high-quality ECE and services to promote college access and completion?
- b. **Service awareness.** Does OCI change the awareness of parents, caregivers, and students of the services available to them and the benefits of those services?
- c. **Service participation.** Does OCI increase the use of services available to parents, caregivers, and students in Oakland?
- d. **Equity.** Has OCI improved equity in access to services for children and families in Oakland?

## 3. How does OCI impact parent, child, and student outcomes?

- a. **Parent and family well-being.** How does OCI change parent and family well-being, including parenting self-efficacy; access to parenting supports; and family financial circumstances, including access to and use of college savings accounts and scholarships?
- b. **ECE decisions.** How does OCI change ECE choices and associated costs; enrollment and participation in preschool; and the transitions into TK and kindergarten?
- c. **School and postsecondary trajectory.** How does OCI change parents’ and children’s educational aspirations and expectations and participation in associated activities such as preparation for college and scholarships, SAT prep, completion of the Free Application for Federal Student Aid (FAFSA), and academic tutoring?
- d. **Educational outcomes.** How does OCI change children’s educational outcomes, including their grades, school attendance, high school course selection, graduation rates, and college enrollment and completion?
- e. **Equity.** How does OCI change the level of equity in these parent, family, and student outcomes across racial and ethnic groups, income groups, and neighborhoods?

## 4. How does OCI affect the social and economic health and well-being of the City of Oakland and its neighborhoods and communities?

- a. Do changes in access to and the quality of services translate into positive social and economic benefits for the city and its neighborhoods, including, for example, greater availability of high-skilled labor, increased business starts, higher per capita income, or more investment in public infrastructure?
- b. Do these benefits improve equity in the city?
- c. Does OCI cause fewer families to leave Oakland and more families to move to Oakland?

- d. Is there a positive impact of OCI on other parts of the City of Oakland’s administration, for example, through greater collaboration, more community involvement, or improved accountability?

**5. What are the most important facilitators for and challenges to the success and long-term potential of OCI? What changes to OCI are needed to increase its success?**

- a. What made the biggest difference in establishing and strengthening the relationships between OCI and its community partners and among the partners themselves? What barriers remain and how could they be addressed?
- b. What made the biggest difference in improving parent/family well-being and access to high-quality ECE and services to promote college access and completion? What aspects of families’ lives and circumstances are more difficult to improve? What areas are ripe for additional investment and intervention?
- c. What made the biggest difference in changing educational outcomes? Which of those outcomes are most difficult to change and why? In what areas does remaining inequity in access to resources and supports continue to influence these outcomes more than it should?

## Design Overview

To answer these research questions, the impact evaluation must measure outcomes at three levels:

- 1. **Service providers and service infrastructure:** The organizations and staff providing education services to children and families in Oakland
- 2. **Children, youth, and families:** The children, youth, and parents/caregivers using ECE services, attending Oakland schools, preparing for college, or attending college
- 3. **Community:** The larger Oakland community, including specific neighborhoods, economic sectors, and demographic groups

Data on these outcomes can come from four different types of data sources:

- 1. Administrative program enrollment and participation data, including results-based accountability (RBA) measures
- 2. Staff survey data
- 3. Parent, family, and student survey data
- 4. Administrative data on educational and economic indicators and other measures of community progress

With these data sources—which should be collected longitudinally across a representative sample of Oakland households, schools, and neighborhoods—it is possible to use a difference-in-differences approach to estimate the impact of the OCI investments, as they are rolled out over time, on these outcomes. This methodological approach and any caveats associated with it are discussed in detail in later sections of this report. The approach relies on the fact that variation in outcomes is correlated with variation in exposure to (or benefit from) OCI funding. For example, a parent in a specific neighborhood and income group who is looking for ECE for her 4-year-old child may have a different experience in 2028 than she had in 2025. In a different neighborhood or higher income group, that difference between 2025 and 2028 may not exist. Comparing these differences in trends across service sectors, neighborhoods, and cities will provide answers to the OCI impact questions.<sup>3</sup>

This approach only works when the underlying data being compared are “universal”—that is, they represent the entire city of Oakland and support valid comparisons between different agencies, families, students, and neighborhoods, and comparisons between Oakland and neighboring communities.<sup>4</sup> Having universal and representative data is also important for measuring OCI’s impact on equity. Only by comparing the experiences of higher income and lower income families, for example, can you determine whether OCI improved equity between these two groups of families.

In the subsequent sections of this report, we detail an approach to measuring OCI’s impacts at the program and agency level and at the family, child, student, and community level, respectively.

## Impacts on the Service Infrastructure

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OCI aims to improve and expand the availability, quality, and affordability of ECE services and to change the PreK–12 and higher education systems to support better transitions from high school to college and to careers. This in turn will improve the long-term educational, workforce, and economic outcomes for the city and its families and children and will reduce existing inequities in educational and economic outcomes. A first step in this process (as shown in Exhibit 1, which presents a logic model for the initiative) is the impact of OCI funding on

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<sup>3</sup> As discussed in more detail in later sections of this report, an important constraint for a study design that relies on analyzing data over time is that some of these data sources (like the surveys) will not fully cover the time **before** the first OCI investments began to be rolled out. However, because OCI is an ongoing initiative with continued financial investments into the future, its benefits should accumulate over time. This should result in continued improvement of the experiences and outcomes of families and children in Oakland, which these data sources will be able to measure.

<sup>4</sup> Please note that “universal” in this case does not mean “collected from every child or family.” As detailed in this report, it is fine to use data from relatively small samples of families, students, or ZIP codes, as long as they are representative samples.

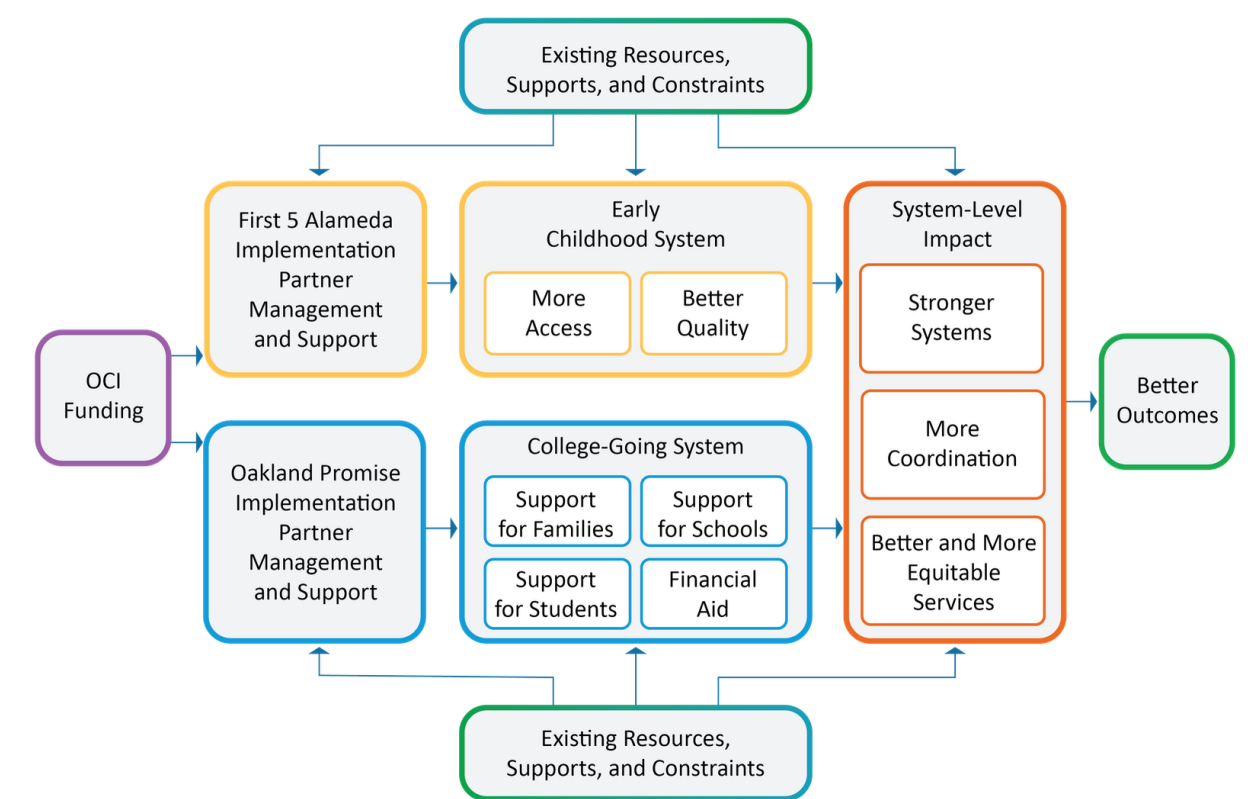
services available to Oakland families and students and the program staff and educators that provide them. How do agencies respond to the inflow of OCI funding? What specific program strategies and activities do they fund? How does this affect the availability and use of services? How does it affect the well-being, job stability, and retention of the workforce?

Two types of data sources allow us to measure these initial system-level effects:

(a) administrative program data (e.g., the number of subsidized preschool slots, the number of qualified staff vacancies to cover those slots, or the percentage of high school juniors who receive college counseling) and (b) staff survey data. The latter provides important complementary details about the day-to-day experiences and activities of the people who manage and deliver the services. This includes program leaders, educators, professional development providers, and IP managers. Together, these professionals are the foundation for the ECE and educational service infrastructure in Oakland. Do they have the resources and training to do their jobs well? Do they feel empowered and equipped to help the families they serve? Do they feel like they are making a difference? What may be holding them back? Staff survey data are important for capturing staff perceptions on job satisfaction, staff self-efficacy, tenure, training, growth opportunities, and other aspects of the staff experience, which are all directly related to the quality and effectiveness of the services provided, and, ultimately, to the levels of funding available for the work.

The scope of these staff survey efforts depends on several factors, including the availability of existing data (or ongoing workforce survey efforts), the availability of evaluation resources, and concerns about burden (e.g., we realize that teachers often report being “over-surveyed” these days). However, it is important to lift up the day-to-day experiences of the “OCI-impacted” workforce in any serious evaluation of the Initiative.

**Exhibit 1. Logic Model for the Oakland Children’s Initiative Impact Study**



## Data Collection Strategies

Much of the relevant administrative data on program services will be collected on a continuous basis by the OCI Accountability Officer (for auditing purposes) and by the Economic Impact Study (EIS) team; this team documents the financial and economic impacts associated with OCI funding (Escueta et al., 2026). Basic information to be collected includes what the Implementation Partners spend the OCI funding on through invoices, how this funding increases (or maintains) available resources and existing investments, and how these services are subsequently delivered to and used by the community. Much of this data is also covered by the results-based accountability (RBA) measures that OCI’s implementing partners use to report on their progress. However, while documenting these funding decisions and RBA measures is an essential first step, an important additional step is to establish what this service infrastructure would have looked like in the absence of the OCI. The EIS sought to obtain this information for certain components of the initiative by qualitatively examining how OCI funds are leveraged and how they may unlock additional funding from other sources. This impact evaluation should go a step further and seek out data sources that describe the availability and

use of OCI-funded services *before* OCI funding became available. Exhibit 2 lists some data sources that may meet this purpose.

## Exhibit 2. Administrative Data Sources for Analyzing System-Level Impacts of OCI Funding

| Construct                           | Indicators                                                                                                                                                                                  | Possible data sources                                                                                                              |
|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>Access to ECE</b>                | Available slots, size of waiting lists, average waiting time, out-of-pocket expenses for parents                                                                                            | Resource and referral agency data, OUSD enrollment data, Head Start enrollment data                                                |
| <b>Child care quality</b>           | Staff-child ratio, staff qualifications, professional development opportunities, facilities, educational resources                                                                          | Resource and referral agency data, OUSD staffing data, Head Start staffing data, Quality Counts data                               |
| <b>College support for families</b> | Number of families with college savings accounts, receiving financial counseling, or related supports                                                                                       | Brilliant Baby and K2C program records                                                                                             |
| <b>College support for schools</b>  | Number of academic and college counselors in OUSD and charter schools, counselor-to-student ratios                                                                                          | OUSD staffing data, possible future Oakland Promise RBA measure                                                                    |
| <b>College support for students</b> | Number of advising, mentoring, and counseling sessions attended (in school and out of school); help with the SAT, FAFSA, college application, selection, and persistence                    | Service records from Oakland Promise and its subcontractors; OUSD and community college data on student enrollment and service use |
| <b>Financial aid</b>                | Number of students receiving scholarships, Pell grants, student loans, and other financial aid; amount of financial aid received/distributed; remaining out-of-pocket expenses for students | Oakland Promise records and data from OUSD and from receiving colleges and universities; National Student Clearinghouse data       |

Survey data from program staff and educators who manage or deliver OCI-funded services complement these administrative data sources in several ways. First, they capture the perspective of the individuals who deliver the services that OCI funds or promotes. Second, these data will help to establish whether and how much the impact of OCI on the service infrastructure is felt at the ground level. Third, over time, a series of regular workforce surveys will enable the impact evaluation to capture information on changes in resources, perceived service quality and timeliness, staff support, collaboration, job stability, and job satisfaction. All of these factors are important proximal indicators of service delivery systems that are more

functional and responsive to community needs (Boardman & Sunquist, 2009; Iaffaldano & Muchinsky, 1985; Judge et al., 2001). Staff who are better supported and have smaller caseloads and more narrowly defined responsibilities can be more responsive and deliver higher-quality support to families, teachers, and students (e.g., Kim et al., 2019; Lushin et al., 2023).

To be useful, a longitudinal staff survey must meet three requirements:

1. It must be **valid**, capturing real experiences and opinions with enough sensitivity to detect small but meaningful change over time (i.e., sufficiently large samples).
2. It must be **representative** and include program staff and educators across the full array of agencies and service areas that OCI affects.
3. The survey must be designed and administered to yield a **high response rate** to avoid nonresponse bias and protect the validity of wave-over-wave trend analyses from unwanted changes in the composition of the survey sample.

When carried out systematically and with good response rates, a workforce survey would also provide important contextual information on job tenure, changes in staff responsibilities and qualifications, and job turnover, including departures and new hires. All these factors can be leading indicators of the success of OCI investments. For example, if OCI-funded professional development for OUSD early educators improves their day-to-day interactions with challenging students, this could lead to greater job satisfaction, reduced attrition, and more professional growth.

The three primary challenges with implementing a longitudinal workforce survey like this are (a) establishing an appropriate sampling frame, (b) finding a way to reliably engage the individuals included in this sampling frame, and (c) incentivizing those staff members to answer the survey. This approach requires ongoing collaboration with and support from leaders in the organizations and agencies where staff work. Examples of this support include assembling, sharing, and updating staff rosters; promoting the survey and its utility for the agencies and their roles within the larger OCI; and supporting the use of incentives (gift cards, raffles, etc.) to encourage staff to participate.

To make the data collected in longitudinal workforce surveys as useful as possible, it is important to ensure that the data are linked across multiple survey waves for the same individuals. To protect privacy and confidentiality, this linking can be done using pseudo-IDs that are tied to individual staff members' email accounts, which themselves can remain hidden.

To keep these surveys short and the response rates high, it is recommended that the survey use a small set of core questions that are repeated each wave (to support robust trend analyses over time) and supplement these questions with one-time modules that focus on a specific aspect of OCI implementation, partnerships, or a specific impact question. For example, the survey may ask staff about opportunities for professional growth and advancement or about challenges in promoting and increasing equity in the provision of services. Depending on the length and scope of the impact evaluation, these “one-time” modules can be repeated every other wave or once every few waves, as needed and as appropriate.

The timing and frequency of the survey are subject to OCI resource constraints. In prior work, we have found annual staff surveys to work best because they provide an easy framework for respondents to respond to (e.g., “in the last year, my access to special TK classroom resources increased”) and they provide sufficiently fine-grained data to support longitudinal impact analyses (see next section). However, biannual surveys (every other year) may be sufficient, especially given the expected longevity of OCI and its stable funding.

## Impacts on Children, Youth, and Families

After establishing the impact of OCI at the program or service provider level, the next step is to measure outcomes at the child, youth, and family level. Those outcomes can be divided into shorter-term (proximal) and longer-term (distal) outcomes. Many of these outcomes may be covered by extant administrative data. Some of these outcomes are presented, together with potential data sources, in Exhibit 3. Examples include enrollment rates and turnover in ECE programs (including Head Start), kindergarten readiness measures and other academic outcomes in OUSD and charter schools, use of tutoring and college advising services, FAFSA completion, rates of SAT/ACT test taking and preparation, and college applications, enrollments, and completions. Gaining access to these data is not trivial, even though they are already collected and theoretically available for analysis. Strong collaboration with Implementation Partners and their successive partner agencies will be necessary to gain access to these data, which will require strict privacy protections, data sharing agreements, and, potentially, active informed consent by parents and students.

### Exhibit 3. Administrative Data Sources for Child, Youth, and Family Outcomes

| Construct      | Indicators                                                                                      | Possible data sources                                                                            |
|----------------|-------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| ECE enrollment | Share of 3- to 5-year-olds in different child care arrangements: subsidized/unsubsidized, full- | Resource and referral agency data, OUSD enrollment data, Head Start enrollment data, census data |



| Construct                         | Indicators                                                                                                                                                                                                 | Possible data sources                                                                                                     |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
|                                   | time/part-time, full-year/part-year, stability of care, proximity of care                                                                                                                                  |                                                                                                                           |
| <b>ECE inclusivity</b>            | Share of children in various groups receiving high-quality ECE services (e.g., children with disabilities, children experiencing homelessness, children in the foster care system, dual language learners) | Resource and referral agency data, OUSD enrollment data, Head Start enrollment data, census data                          |
| <b>ECE quality</b>                | Share of children in settings with high Quality Counts ratings, highly qualified staff members, and/or high observed quality ratings                                                                       | Quality Counts ratings; OUSD CLASS scores; data about workforce qualifications, tenure, and professional development      |
| <b>Kindergarten readiness</b>     | Child assessments in state preschool programs, Head Start programs, TK classrooms, and kindergarten classrooms                                                                                             | OUSD EDI data; ASQ or TS Gold data from OUSD preschool programs and Head Start centers                                    |
| <b>PreK–12 academic outcomes</b>  | Grade 3 test scores, Grade 8 test scores, course-taking patterns (including AP), SAT test-taking rates, graduation rates                                                                                   | OUSD and charter school records                                                                                           |
| <b>College readiness supports</b> | Number of students participating in mentoring or advising programs and other services to support college transitions                                                                                       | Oakland Promise and OUSD records                                                                                          |
| <b>Postsecondary outcomes</b>     | Enrollment, persistence, and completion of 2- and 4-year college programs                                                                                                                                  | OUSD records, National Student Clearinghouse data                                                                         |
| <b>Financial aid</b>              | Receipt of scholarships, Pell grants, student loans, and other financial aid; remaining out-of-pocket expenses for students                                                                                | Oakland Promise records, data from OUSD and from receiving colleges and universities; National Student Clearinghouse data |

Administrative data have important benefits as primary data sources for an impact evaluation. For example, they can be relatively inexpensive to collect; cover a long time period; include representative samples of families, children, and students across Oakland; and may also allow for comparisons with adjacent or comparison communities (more about this in the section that follows). These data are most useful when they are linked over time and across individuals and families, so that the evaluation can, for example, connect participation in OCI-supported ECE settings with later kindergarten readiness outcomes. Building a robust, integrated, and cross-linked data set across several different outcome domains should therefore be a priority for the

impact evaluation. As mentioned, this will entail developing data sharing agreements, adopting strict data protection and privacy protocols, and creating the physical infrastructure to acquire, store, de-identify, and analyze the data. This work may be able to build on existing data integration initiatives at OUSD and other city or county agencies, including the IPs, who would be critical partners in this work, even if an evaluation contractor would create the ultimate analysis files.

Unfortunately, many important OCI outcomes for children, families, and students are not captured by administrative data sources such as those listed in Exhibit 3. This is true especially for important proximal and short-term outcomes, such as the experiences of parents and students as they interact with the systems that serve them. For example, parents who have a positive perception of the affordability of college for their children are more likely to actively engage in their children's education, be more involved with their children's schools, and seek out other supportive services (see e.g., Elliot, 2013; Friedline et al., 2013; Shanks et al., 2014). Capturing these early indicators of OCI's impact is important both in its own right and to help understand and contextualize OCI's longer-term benefits.

A good way to capture these early impacts is to collect survey data from a series of representative, cross-sectional samples of families in Oakland. Beginning in 2026, the OCI evaluation team should consider sampling a cross section of Oakland families with children ages 0–18 and following these families in a multiyear rolling panel study. In such a panel study, a sample of 100–150 parents or caregivers would participate by answering annual surveys for 3–5 years, after which they “roll off” and new families replace them. Using within- and across-family analyses, the experiences and opinions of such a rolling survey panel will provide the OCI team with a continuous assessment of the experience of Oakland families as children age. It will also help the team assess how those experiences improve across successive cohorts of families. By using a representative sampling strategy, it is possible to compare the experiences of families with different income levels or families living in different neighborhoods over time. This approach will directly address the important equity questions underlying the evaluation, including the following: Do gaps in child care resources, child outcomes, family well-being, and college resources narrow over time?

In Exhibit 4, we list a number of relevant constructs that such a survey should capture. Note that these constructs change depending on the ages of the children in the family. Also note that, as part of carrying out these surveys, the OCI evaluation team should seek permission to

link these survey data to the administrative data provided in Exhibit 3.<sup>5</sup> That way, longer-term data on academic and college outcomes can be tied to earlier responses to the survey questions in the panel study and vice versa. For example, analyses can explore how OCI-funded college advising services for OUSD families improve subsequent college outcomes as captured in data from the National Student Clearinghouse.

Note that Exhibit 4 divides the survey into four distinct cohorts (ages 0–4, kindergarten, Grade 8, and Grade 11). These are the time points when specific types of OCI impacts would be most apparent and easiest to measure (e.g., when parents look for ECE options or when students make college decisions). However, for the study design, it does not matter a lot which time points are picked. There could be more or fewer, depending on resource constraints and other methodological considerations.

#### Exhibit 4. Sample Survey Constructs and Potential Measures<sup>6</sup>

| Construct                          | Sample indicators                                                                                                                                           | Possible scales/questions                                               |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| <b>Ages 0–4 cohort</b>             |                                                                                                                                                             |                                                                         |
| <b>ECE decision making</b>         | Process for finding, securing, and paying for ECE; stress and uncertainty about ECE decisions; preferences and priorities and how well they are met         | ECE decision making scale; parenting stress scale                       |
| <b>ECE satisfaction</b>            | Degree to which parents are satisfied with their ECE arrangements; how they would change them if they could; and the degree to which children are satisfied | Parent satisfaction ECE scale; parent satisfaction with education scale |
| <b>Kindergarten cohort</b>         |                                                                                                                                                             |                                                                         |
| <b>Kindergarten/TK transitions</b> | Parent engagement in school choice decisions and preparation for kindergarten or TK; success of transition                                                  | Kindergarten transition practices; school choice questionnaire          |

<sup>5</sup> This is done by asking for active parental consent to link to external data during the first interview. This results in a data file with parent- and child-level identifiers accompanied by active consent. It is much easier to get public agencies (like a school district or resource and referral agency) to agree to share their data when the person whose data they share gave active consent to do so. AIR has done this successfully with a survey sample in Tulsa, Oklahoma, that we were able to match to Oklahoma Department of Health data as part of our evaluation of the city's Birth to Eight Strategy (BEST).

<sup>6</sup> The constructs in this table are presented for different age groups, since many relevant constructs and questions only apply to a single age group (e.g., ECE enrollment is not relevant for school-age children). However, there will also be constructs that cut across all age groups (e.g., perception of Oakland as a good place to raise children).

| Construct                                           | Sample indicators                                                                                                                                       | Possible scales/questions                                                             |
|-----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>Parental involvement in school and academics</b> | Interactions with school staff; engagement around academic performance and homework; educational aspirations and expectations; satisfaction with school | Various measures and scales (e.g., Goodall & Montgomery, 2023; Schueler et al., 2017) |
| <b>Motivation for school</b>                        | Child engagement and satisfaction with school; self-efficacy; goals; educational aspirations and expectations                                           | Parent report of children's motivation for school                                     |
| <b>Social-emotional development and behavior</b>    | Child's social skills; self-regulation; socialization; behavior problems in school                                                                      | Parent report of child's social-emotional development and discipline issues in school |
| <b>Middle school cohort (Grade 8)</b>               |                                                                                                                                                         |                                                                                       |
| <b>Parental involvement in school and academics</b> | See panel above                                                                                                                                         | See panel above                                                                       |
| <b>Motivation for school</b>                        | See panel above                                                                                                                                         | See panel above                                                                       |
| <b>Social-emotional development and behavior</b>    | See panel above                                                                                                                                         | See panel above                                                                       |
| <b>Extracurricular and afterschool activities</b>   | Participation in sports, afterschool programs (academic/other), college-going/readiness programming, summer programs                                    | Various survey measures                                                               |
| <b>High school cohort (Grade 11)</b>                |                                                                                                                                                         |                                                                                       |
| <b>Parental involvement in school and academics</b> | See panel above                                                                                                                                         | See panel above                                                                       |
| <b>Motivation for school</b>                        | See panel above                                                                                                                                         | See panel above                                                                       |
| <b>Social-emotional development and behavior</b>    | See panel above                                                                                                                                         | See panel above                                                                       |
| <b>Extracurricular and afterschool activities</b>   | See panel above                                                                                                                                         | See panel above                                                                       |

| Construct                                       | Sample indicators                                                                                                                                            | Possible scales/questions                                                                                            |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| <b>Occupational and educational aspirations</b> | Parent and/or student expectations for future education or work                                                                                              | Various measures and scales                                                                                          |
| <b>Postsecondary preparation</b>                | Mentoring/advising, meeting with college advisors, SAT test prep, SAT test taking, college visits, college applications, FAFSA completion, college selection | Various measures and scales (some administered in Grade 11, some in Grade 12, and some after high school graduation) |

## Impacts on the City of Oakland and Its Neighborhoods

In addition to measuring impacts of OCI at the system and child/family levels, it is possible to capture effects at the community level, both for the city as a whole and for specific neighborhoods or ethnic communities within the city. Such analyses depend on longer-term trends in social and economic outcomes for geographic areas such as zip codes or census tracts. As discussed later, these community-level analyses are most productively done in later phases of the OCI evaluation, when OCI funding has been in place for a number of years, OCI-funded activities and supports have had the chance to transform the experiences of the city's children and families, and impacts are starting to be felt at the neighborhood and city level. Examples of such longer-term impacts are changes in the education levels and credentials of the workforce in Oakland, changes in public perceptions of Oakland as a place to raise a family, and associated changes in residential mobility, private investment, and employment opportunities. These community-level changes can further reinforce the direct benefits of OCI funding and can also increase the tax base for the city as a whole, offsetting the long-term fiscal expense of funding OCI. The latter may be featured as a topic for further analysis in a future economic impact study report.

As illustrated in Exhibit 5, data for future community-level impact analyses can come from a variety of public and administrative sources, including, for example, the decennial U.S. Census, the American Community Survey (ACS), and the Bureau of Labor Statistics (BLS). An important advantage of all of these data sources is that they go back in time to well before OCI was developed and they cover other cities and communities that are adjacent to Oakland and/or are comparable to Oakland in terms of the prior trajectory of their outcomes. Thus, it will be possible to compare trends in important long-term OCI outcomes in Oakland to nearby cities like Richmond, Hayward, or Berkeley, and also to comparable cities in other states or regions that may better match Oakland's particular economic and fiscal circumstances. And, perhaps most importantly, it is possible to match specific neighborhoods within Oakland to comparable

communities elsewhere to see whether OCI reaches its equity goals by narrowing gaps in educational and economic outcomes between different neighborhoods in Oakland, compared to other similar-sized cities like Fresno, Long Beach, or Portland.

#### Exhibit 5. Sample Data Sources for Analyzing Community-Level Impacts of OCI Funding

| Construct                          | Indicators                                                                                                | Possible data sources                                                                                                                                                                                                                                                                                                                      |
|------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Child care affordability</b>    | Out-of-pocket child care expenses for 4-year-olds as a share of household income                          | American Community Survey                                                                                                                                                                                                                                                                                                                  |
| <b>Child care availability</b>     | Enrollment data for 4-year-olds                                                                           | American Community Survey                                                                                                                                                                                                                                                                                                                  |
| <b>Best place to raise a child</b> | Child Opportunity Index                                                                                   | American Community Survey, synthesized by diversitydatakids.org (Noelke et al., 2025)                                                                                                                                                                                                                                                      |
| <b>Educational attainment</b>      | High school graduation<br>College enrollment<br>College degree attainment                                 | American Community Survey                                                                                                                                                                                                                                                                                                                  |
| <b>Residential stability</b>       | Number of years in current residence and/or in current community (especially relevant for young families) | American Community Survey                                                                                                                                                                                                                                                                                                                  |
| <b>Economic development</b>        | Employment and earnings<br>Share of jobs requiring advanced degrees<br>Real estate trends<br>Tax basis    | American Community Survey<br>Current Employment Statistics Survey (BLS)<br>Current Population Survey<br>Job Openings and Labor Turnover Survey (BLS)<br>Occupational Employment and Wage Statistics (BLS)<br>Housing Statistics and Real Estate Market Trends (National Association of Realtors)<br>California State Board of Equalization |

## Analytical Framework

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The next step is to develop an analytical framework to identify the OCI impact within these administrative and survey data. The primary purpose of such a framework is to distinguish the effects of OCI from other trends and developments that affect the outcomes. A different way of thinking about that is to ask the question, “What would have happened to this outcome in the absence of OCI?”

There are two main ways to answer this question. One is to study changes in outcomes over time (through longitudinal analyses), and the other is to compare different groups of families, neighborhoods, schools, or students (through cross-sectional analyses). Combining these two approaches strengthens the rigor of each approach by helping to rule out alternative explanations for observed changes or differences (Shadish et al., 2002). For example, recent college enrollment trends in Oakland have been positive, as reflected in a 24% increase in college enrollment for OUSD graduates from 2020 to 2023 (OUSD, n.d.). If these positive trends continued in 2024 and beyond, it would be incorrect to attribute these year-over-year increases in college-going to OCI because these positive developments were already underway before OCI services and financial supports became available to OUSD high school students. However, if we saw college enrollment level off or decline among high school students in Richmond, Hayward, or San Francisco, while enrollment continued to increase in Oakland, that **would** be evidence of OCI’s positive effect on college enrollment. This is why it is useful to combine data that document change over time with data that compare outcomes across different jurisdictions or school districts.

It is possible to conduct similar analyses across different groups of survey respondents **within** Oakland. For example, using several years of panel survey data, the evaluation could compare different aspects of parents’ ECE experiences across different neighborhoods or income groups. If OCI’s investments have the intended effect, these experiences should improve for all families in Oakland (i.e., positive trends over time), but they should also improve **more** for families in currently underserved neighborhoods or families who do not have enough income to pay for expensive private ECE options. That is, the evaluation should look for converging trends over time, signaling greater equity because of OCI’s investments. Such analyses are especially fruitful in cases where specific investments are made that target specific locations (e.g., East Oakland Promise Neighborhood target schools) or specific populations of interest (e.g., children with disabilities), because we would expect to see a closing of existing gaps in outcomes between those targeted groups and the larger population of children and families in Oakland, as well as a general upward trend for the city as a whole. This is why it is important that administrative and

survey data collection are as **universal** as possible, because universal data help to define the overall population trends with which we can compare the experiences of specific groups.

An important caveat for this analytical framework is that some of the data collection activities will only begin **after** OCI investments have started being rolled out. This means that there is no clear “before” measure for some important outcomes (especially those measured with survey data). This may result in some underestimation of the ultimate effects of OCI, as some of the early benefits of the initiative may be missed. Fortunately, extant administrative data do not suffer from this problem and can be used to mitigate this issue.

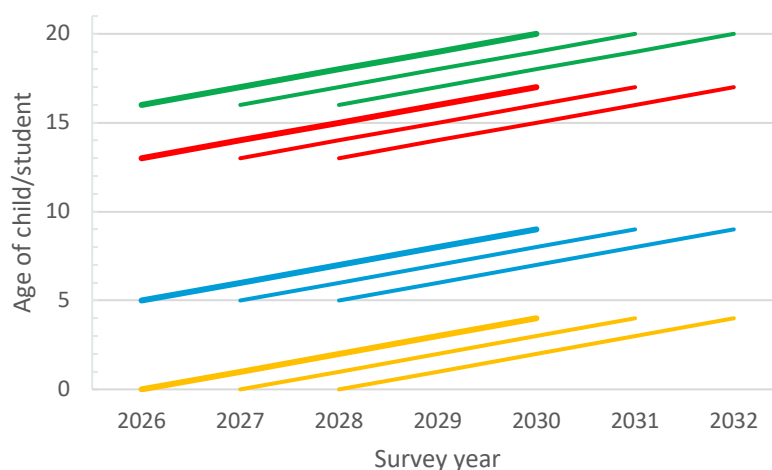
In the following sections, we detail the sampling strategy and possible recruitment strategies for the rolling panel survey and present a data analysis framework for the impact analysis.

## Sampling and Recruitment Strategy

As noted earlier in this document, a primary vehicle for estimating the impacts of OCI on families and children in Oakland is a rolling panel survey of Oakland families in which we collect relevant outcome data directly from parents and students through representative surveys. These surveys—which would be conducted annually or biannually—could start in

2026 with four cohorts: (a) a birth cohort, (b) a kindergarten cohort, (c) a Grade 8 middle school cohort, and (d) a Grade 11 high school cohort. Each of these cohorts would include a representative sample of children in a specific age group (0–1, 5–6, 13–14, and 16–17) as well as their parents or caregivers. By following these children and their families over time through annual surveys, the evaluation would create a comprehensive picture of what it is like to grow up (and parent) in Oakland and how these experiences change over time. Exhibit 6 is a visual representation of how this would work as the impact evaluation progresses. The thicker lines at the top of each set of three lines represent the first survey wave (i.e., children are 0, 5, 13, and 16 in 2026). The lines show how they age over time. The thinner lines show subsequent cohorts of children who will be added in subsequent years to replace those who either “age out” or drop out of the survey. Because the sample is replenished annually as families and students leave the study, there will be new small cohorts in each of the four age groups in every

**Exhibit 6. Conceptual Design for a Multicohort Survey**





subsequent study year. Moreover, if the evaluation lasts long enough, cohorts will begin to overlap as, for example, children in the birth cohort grow up to become a new kindergarten cohort, and so forth. Note that this survey design is flexible: it works regardless of how long each line is (i.e., how long you follow a particular family), how long the overall study lasts (i.e., how long the X-axis is), and how often you survey each family (i.e., how continuous the data on each individual line are). By comparing the experiences of different survey cohorts horizontally across different calendar years, you can estimate how outcomes change over time across otherwise comparable cohorts of families. This information will help to identify the impact of OCI across these different age groups.

Exhibit 6 assumes that there will be annual surveys of these four cohort samples and that the samples will be replenished every year. However, if that study design is too expensive or too burdensome, it is possible to skip years and still maintain the overall integrity of the survey design. Surveying families every 2 or 3 years will still yield useful data for estimating OCI's impact even though there would be some gaps in documenting families' experiences over time and the surveys may need to rely more on respondents' recall.

To ensure the overall representativeness of the survey samples, it is best to stratify the samples by neighborhood, which will also allow oversampling of families for which OCI's investments are particularly relevant. But, as noted earlier, it is important to include families from all major demographic and income groups in the city to estimate OCI's effects on reducing inequity in Oakland.

To further strengthen the value of these surveys for identifying the effects of OCI, it would be helpful to expand the sample to include families that do not live in Oakland and who live, for example, in other cities in Alameda County or in the larger San Francisco Bay Area. As detailed below, adding these families would allow the evaluation to better distinguish what is happening in Oakland as a result of OCI from broader societal and economic trends. It would also allow the evaluation to distinguish the effects of OCI from other initiatives such as Alameda County's Measure C or California's statewide TK expansion, while at the same time allowing evaluations of those initiatives (particularly Measure C) to benefit from (and potentially help support) the OCI evaluation work.

To recruit families for the evaluation, the best strategy is a cluster sampling approach, in which a sample of relevant settings is selected first and then families are invited to participate by trusted partners in those settings. For the birth cohort, pediatric clinics would be a good potential setting from which to recruit families. For the other three cohorts, elementary schools, middle schools, and high schools are good locations from which to sample students and their families. To increase recruitment success and reach traditionally underrepresented

families, it is possible to supplement these larger recruitment settings with smaller programs that serve the targeted age groups, including afterschool programs, resource and referral agencies, Head Start centers, and neighborhood-based youth programs.

The cluster sampling approach would start with building a comprehensive list of agencies, clinics, and school sites that cover the entire City of Oakland. This list would then be stratified by neighborhood, the size of the population served, and the program type, after which a stratified random sample of clusters would be selected. Staff and leaders of these clusters would then be contacted to obtain their permission to be part of the survey's sampling frame. If any sites refused, then alternates would be sampled from the same strata on the initial list. The end result would be a representative group of clusters from which individual families and students could then be recruited.

Recruiting families is the next phase of the sampling process. Working closely with leadership and staff in schools, clinics, and other sampled settings, an individualized outreach plan should be developed to present the survey effort to parents and students and invite them to participate. The goal is to achieve a representative sample of families and students that is large enough to support statistically reliable estimates of the impact of OCI.

### ***Sample Size and Power Analysis***

To establish the sample sizes necessary to obtain reliable impact estimates, we conducted statistical power analyses (Bloom et al., 1999; Cohen, 2013; Hedges & Hedberg, 2007; Raudenbush et al., 2007). We found that the study would need an analytic sample of approximately 354 families across two cohorts to detect a 0.25 standard deviation difference in outcomes between these two cohorts.<sup>7</sup> In a hypothetical design with annual cohorts (as illustrated in Exhibit 6), these samples could be distributed across more than two cohorts, as long as all cohorts were used together in impact analyses.<sup>8</sup> Thus, to adequately power a design with four separate age groups like the one shown in Exhibit 6, a total sample of at least 1,416 families would be needed; the sample would be distributed across the four age groups and across multiple year cohorts.

It is important to ensure that these sample members are distributed across Oakland and its various neighborhoods and demographic groups in such a way that the overall sample is both representative of Oakland and has sufficient sample members in important groups to yield adequate statistical power and representation of those groups. For example, it may be

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<sup>7</sup> We used PowerUp! software to calculate this sample size, with the following parameters: alpha = 0.05, two-tailed test, power = 80%, 50% of sample in each cohort, an R<sup>2</sup> of 30%, and five covariates (Dong & Maynard, 2013).

<sup>8</sup> That is, you could recruit 354 families across 2 years and conduct two-group comparisons or across 3 years and estimate a short trend. Statistically, the available power would be comparable.

necessary to oversample subgroups of families and students who experience the greatest challenges in terms of their ECE access, educational outcomes, or postsecondary success, especially because these groups are most likely to benefit from OCI. A well-stratified sampling strategy is essential to ensure that these surveys produce the strongest basis for a meaningful OCI impact analysis.

### ***Survey Retention Strategies***

To ensure high response rates and high rates of retention between different survey waves, the following proven strategies and incentives should be considered:

- Surveys should always be conducted in respondents' native and/or preferred language.
- Participants should be offered a cash incentive for participating in a survey. The size of this incentive should be linked to the length of the data collection effort.
- Participants should receive annual letters during the holiday period and at their children's birthdays thanking them for being part of the impact evaluation and asking them to notify the survey team if they move. These letters should include handy and attractive refrigerator magnets that also remind participants to let us know if they move.
- After each round of data collection, a subsample of participants should be followed up with to evaluate data collection methods for the next wave.
- The importance and permanence of the OCI impact evaluation should be emphasized with a recognizable study brand using distinct logos and color schemes. This will help reinforce the message that participants are part of a larger effort to benefit their community and contribute to the future investment decisions of OCI.
- This brand should be reinforced by giving away study merchandise to create a sense of community within the project (e.g., T-shirts with the study logo and website).
- Study results should be shared with participants and other community stakeholders via newsletters, social media posts, and news reports, in close coordination with OCI leadership.
- At baseline, alternative contact information should be collected for each participant; the information should be updated at subsequent survey waves.

### ***Data Analyses***

As discussed earlier in this document, the primary source of inference for assessing the impact of OCI is an analysis of difference in differences (DiD). Such an analysis combines variation in outcomes over time with variation across different neighborhoods, schools, or cities to isolate the effect of the initiative or the services that it funds. When using extant data, the DiD

framework compares trends in outcomes and seeks to distinguish an interruption in those trends for one group that is not there for the others. For example, if OCI-funded efforts to increase access to affordable high-quality child care in Oakland pay off, there should be a positive trend in the use of such care over time. But this could happen for reasons other than OCI, like federal or state tax policies or state investments in improving child care. To isolate an effect of OCI specifically, it is necessary to compare trends between the neighborhoods with the greatest OCI investments in child care access and quality and the neighborhoods with smaller investments. Even if both trends are positive, we would expect the trend to be more positive in the neighborhoods that are receiving more OCI funding. We could make similar comparisons across different cities or school districts. For example, an expected effect of OCI is an increase in the proportion of OUSD graduates who successfully complete a college education. But as mentioned earlier, college enrollment (and completion) rates have been increasing throughout California, as part of the slow but steady recovery from the COVID-19 pandemic. So, how can we isolate the effect of OCI investments among these generally positive trends? Using data from the National Student Clearinghouse, it is possible to compare college enrollment and completion trends in OUSD with those in neighboring districts in Richmond, Hayward, Fremont, and other cities (assuming that school districts in these cities already partner with the National Student Clearinghouse or that such partnerships could be established for the purpose of an evaluation like this). If OCI has an effect over and above what those other districts were already doing, such an effect would emerge from an analysis of the differences in the trends across these different school districts.

For the survey sample, similar analyses would rely on comparisons across the different survey cohorts (i.e., drawing horizontal lines across the diagonal lines in Exhibit 6). For example, if OCI improves the ECE infrastructure in Oakland, then parents in the 2028 birth sample would be expected to have a better experience finding infant and toddler care than parents in the 2026 birth sample. In addition, those expected improvements would be stronger for parents with lower incomes than for parents with higher incomes, as noted earlier, which would help to identify OCI's effects. Similarly, looking at the kindergarten age group, parents in the 2028 sample should have a better experience transitioning their children into kindergarten than parents in the 2026 sample, because their children would have had better PreK and TK experiences due to OCI investments to support OUSD early childhood quality initiatives. Those improvements should be greater for dual language learners or for children with special needs because many of the OCI investments were focused specifically on inclusion.

Analyses of survey data could be further enhanced by extending the survey to neighboring communities, possibly in partnership with First 5 Alameda, which is managing the implementation of Measure C in Alameda County. Although Measure C focuses more narrowly on children ages 0–5, it also represents a substantial and long-lasting investment, which

includes the City of Oakland. A joint family survey like what we described in this report would enable analyses that directly compare the experiences of families in Oakland with those of similarly situated families in surrounding communities. This approach could help isolate the unique impacts of OCI over and above the broader county-level investments in the early childhood service infrastructure.

## A Phased Approach to Evaluating OCI

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Because OCI is a long-term investment, it is important to carefully stage different evaluation activities so that they produce the most useful information in a timely way without excessive data collection burden and expenses. Given that the ordinance calls for distinct 2-year evaluation efforts, it is possible to develop a phased approach to the evaluation that partitions out the different data collection and analysis activities across these 2-year phases. Following is a possible approach for the next 6 years:

### 2027–2028

- Design family survey, including sampling frame, instruments, and recruitment strategy (2027)
- Field first wave of Cohort 1 of family survey (2027)
- Design workforce survey, including sampling frame, agreement with partner agencies, instruments, and recruitment strategy (2027)
- Field first wave of workforce survey (2027)
- Conduct baseline analysis of workforce survey and family survey data (2028)
- Develop data sharing agreements with educational partner agencies (OUSD, charter schools), National Student Clearinghouse, and higher education agencies (2027)
- Collect first round of community-level outcome data from American Community Survey and other agencies (2028)
- Field second wave of Cohort 1 of family survey (2028)
- Collect first round of administrative data (2028)

### 2029–2030

- Field first wave of Cohort 2 of family survey (2029)
- Field second wave of workforce survey (2029)

- Field third wave of Cohort 1 of family survey (2029)
- Field second wave of Cohort 2 of family survey (2030)
- Conduct preliminary short-term impact analyses using administrative data (2029)
- Conduct short-term impact analysis of workforce survey data (2030)
- Conduct short-term impact analysis of Cohorts 1 and 2 of family survey data (2030)
- Conduct first round of community-level impact analysis (2030)
- Collect second round of administrative data (2030)

### **2031–2032**

- Field first wave of Cohort 3 of family survey (2031)
- Field third wave of workforce survey (2031)
- Field third wave of Cohort 2 of family survey (2031)
- Field second wave of Cohort 3 of family survey (2032)
- Conduct impact analyses using administrative data (2031)
- Conduct impact analysis of workforce survey data (2032)
- Conduct impact analysis of Cohorts 1, 2, and 3 of family survey data (2032)
- Conduct second round of community-level impact analysis (2032)
- Collect third round of administrative data (2032)

After 2032, the City of Oakland could either continue this cadence of data collection and analysis or revise it to meet the OCI evaluation needs at that point. At each stage, each 2-year evaluation period would conclude with a final report that incorporates the results of all analyses and data collection activities conducted during that 2-year period.

It is important to connect the proposed OCI impact study with a continued process study of the Initiative. AIR conducted the first process study of OCI in 2025–2026 to capture early implementation findings from the Initiative. In addition to exploring the perceived impact of new and expanded services through OCI, the study gathered initial feedback about issues such as OCI’s governance and structure in the first 2 years of the Initiative’s implementation.

Future research (through a continued process study) can focus more deeply on OCI system-building efforts, including the nature and strength of partnerships among OCI partners and other system players, as well as the partnership between OCI partners and the OCI

Accountability Officer. In addition, the study could focus on the extent to which OCI-funded services are connected and integrated across the PreK–12 and postsecondary systems, the role of community members in the Initiative, and governance issues including decision-making processes.

A continued process study would include the following steps:

1. **Convene a planning group with the OCI Accountability Officer and Implementation Partners.** The purpose of this planning group will be to reflect on the lessons learned from the initial 2-year evaluation of OCI, identify areas for continued research, and develop research questions for the process study. This planning phase would also include an assessment of existing IP data collection activities and opportunities to leverage these efforts for the process study and other evaluation activities. For the purposes of the process study, we anticipate the initial planning process would take approximately 3 months, with ongoing communication and coordination throughout the 2-year evaluation period. (As noted earlier, the OCI Ordinance requires an evaluation of the Initiative every 2 years.) In addition, the planning group can be leveraged to review and finalize the impact study design.
2. **Develop data collection strategies and tools to address the process study research questions.** The evaluation team will develop strategies and tools to collect data from respondent groups, with feedback from the Accountability Officer and the planning group. We anticipate development of data collection strategies and tools will take approximately 2 to 3 months and will be phased into Step 1, above, as the design and focus of the study is confirmed. In total, the planning process with the OCI Accountability Officer and the planning group (Step 1) and the work to develop data collection methods and tools (Step 2) will take approximately 6 months.
3. **Conduct data collection with identified respondent groups.** The first step in data collection will involve outreach to respondent groups to explain the evaluation approach and gather their input to ensure the data collection burden is minimized and that evaluation approaches are responsive to the community. To support participation among youth and family members, the evaluation should offer monetary incentives (e.g., gift cards) and data should be collected in respondents' preferred language. The data collection period, including outreach and planning, will last between 8 and 10 months, depending on the scope of the research questions.
4. **Analyze data, engage the OCI Accountability Officer and Implementation Partners to review and discuss the initial findings, and develop the evaluation report.** To ensure meaningful engagement with the IPs, the evaluation should carefully plan for feedback sessions, as part of the overall evaluation planning process in Step 1. The process of



analyzing data, engaging partners, and developing the evaluation report will take up to 6 months.

5. **Present findings to the OCI Commission and other groups, as identified by the OCI Accountability Officer.** Our tentative time frame for the evaluation leaves approximately 2 months for this step.

**Budget and Scope of Work Considerations.** The distinction between the process study and the impact study is somewhat artificial. Findings from the process study focused on OCI system improvements are, in fact, early “impacts” of OCI and can be leveraged and integrated into the impact study. The City may consider packaging plans for a systems-focused process study into the impact study (referring to the entire evaluation as an impact study). An important consideration, however, will be to ensure that the evaluation as a whole will generate a report to meet the requirements of the OCI Ordinance, which specifies an evaluation must be completed every 2 years. The proposed time frame for the continued process study described above would meet this requirement, with the production of a process study report, and also include baseline findings from the family survey and workforce survey from the impact study.

At the same time, it will be important to consider what will be feasible to complete, given the time frame and available resources. Prioritizing the impact study, we recommend careful planning to determine an appropriate scope for the process study that can be accomplished within the evaluation time frame, within the budget available. This may mean a defined focus on specific systems-level issues, rather than a broad examination of the Initiative as a whole (as was done in the initial 2-year process study of the Initiative).

## Summary and Next Steps

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This document has presented a plan for a comprehensive and rigorous long-term impact evaluation of OCI. We recommend applying a difference-in-differences evaluation design framework to a variety of different administrative data sources and to supplement those extant data analyses with a longitudinal multicohort family survey. The administrative data will provide the impact evaluation with inexpensive long-term measures covering many important outcome dimensions, including family well-being; preschool participation; kindergarten readiness; academic outcomes in elementary, middle, and high school; college enrollment; and college completion. The survey data will fill in many of the gaps between these administrative data measures, including child care experiences, school supports and engagement, educational aspirations, preparation for college, and barriers to postsecondary success; the data will also demonstrate how these gaps are overcome. Together, these data sources will tell the story of



OCI, including how specific OCI-funded programs and services contribute to improved outcomes for Oakland’s families and students.

Building on the process study, the impact evaluation will then capture the impact of OCI efforts to improve the early education and college access system in Oakland. This would include the effect of direct investments in ECE quality, school transitions, and preparation for college, as well as the effect of greater collaboration and integration of services resulting in lasting systems change, greater efficiency among system partners, and more sustainability. These effects on services, including how they are delivered, are the precursors of the longer-term effects of OCI on children and families. This institutional impact analysis will also depend on a combination of administrative and survey data—administrative data to capture the actual delivery of services to the community and survey data to capture the perspective of the staff members who make it all happen.

To be most useful to the City of Oakland and the people overseeing OCI implementation, all these data collection efforts should begin as soon as possible. A difference-in-differences evaluation framework depends on trends in outcomes over time as one of its primary sources of inference. The further back in time the data reach, the more useful they are. This is especially important for survey data, which are best suited for capturing what is happening at a specific point in time. If the city decides to field a family survey like the one presented in this report, it would be best to begin fielding the survey in 2026 if possible.

As for next steps, we look forward to discussing this document with all the major OCI stakeholders, including the Implementation Partners and the broader community. The first step should be to refine the logic model underlying OCI and the specific services and activities it funds. This, in turn, will help us refine the various outcome tables in this report and identify the specific measures and data sources that best capture those outcomes. The next step should be to refine the data collection strategies described herein, including the best way to select a representative sample of families and students, which age groups to focus on in a survey, how frequently to administer the various surveys, and how to gain access to the administrative data needed to capture extant outcome measures.

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