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Supplemental Materials

As mentioned in the cover letter of this renewal petition, Education Code 47605 (g) requires charter petitions to include information regarding the proposed operation of the school including:

1. The potential effects of the school
2. The specific location of proposed facilities
3. The manner in which administrative services are to be provided
4. Potential Civil Liability Effects

While these items are addressed within the petition document itself, we have also explicitly identified and addressed them here for the sake of clarity.

1. The potential effects of the school

We see two major potential effects of ODA on the local community: one related to finances and the other to academic opportunity.

First, we take seriously the financial implications charter schools can have on surrounding districts when not carefully positioned. Indeed, we recognize that charter schools often negatively impact the financial stability of their home districts, and were careful to mitigate these concerns as far as possible in the design and positioning of ODA. In particular, we see two unique opportunities to make ODA a cost-neutral presence within the surrounding district:

Factor 1: Alleviate overcrowding. Menlo-Atherton High School is the local public high school for students in East Palo Alto and East Menlo Park. Recent demographic shifts have put immense enrollment pressure on Menlo-Atherton, such that the school faces overcrowding even despite the construction of TIDE Academy.¹ The closure of East Palo Alto Phoenix Academy's high school² further contributes to these concerns. By serving students from the Menlo-Atherton enrollment region, we hope to alleviate these challenges and their corresponding costs (particularly in construction and facilities growth).

Factor 2: Secure private facilities. Since opening, ODA has occupied private facilities and used SB740 funds to cover associated costs. As traditional public schools are not eligible for SB740 funding, this has allowed ODA to secure facilities at no direct cost to the district-- a considerable financial saving. ODA has identified long-term facilities and is in the process of permitting and renovating those now, all through non-district funds.

¹ "High School District Wants Money from Facebook Because of Expected Enrollment Growth - Palo Alto Daily Post." *Palo Alto Daily Post*, padailypost.com/2018/04/14/high-school-district-wants-money-from-facebook-because-of-expected-enrollment-growth/. Accessed 7 Aug. 2019.

² Swartz, Angela. High School District Sues Charter School Organization for \$4 Million. 2 May 2019, paloaltoonline.com/news/2019/05/02/high-school-district-sues-charter-school-organization-for-4-million.

Taken together, these two factors historically have helped mitigate the cost of ODA for Sequoia Union High School District by offsetting large facilities expenses that the district might otherwise have incurred.

Second, we think ODA affects the community positively by offering a unique and high-quality academic programming option to local students. ODA's focus on multicultural social leadership, as well as our emphasis on Socratic learning methods, offers a unique experience for students who do not thrive in traditional learning environments. Furthermore, our deep partnership with faculty at the University of Oxford as well as our commitment to international exchanges and study abroad trips provide distinctive opportunities for meaningful multicultural experiences. We believe this is an important positive effect of ODA on the local community, as it offers a unique option for families in search of something different.

2. The specific location of proposed facilities

ODA currently occupies a temporary facility at 1001 Beech Street in East Palo Alto; this space is shared with Bayshore Christian Ministries and will be our operating location through the 2019-20 school year. As discussed above, ODA is in the process of finalizing a long-term lease for a permanent facility. The facility is near our existing temporary site, such that its location will not change the ability of current students (or future students in the same neighborhoods) to attend ODA. As we are currently in the process of negotiating the lease, as well as ensuring necessary permits and tenant improvements. As such, we are not able to share the specifics of this facility in a public document (like this charter petition) but can provide further information privately upon request.

Impact on enrollment. The transition to a long-term facility has required us to significantly shift our enrollment goals over the years. As shown in **Figure SM1**, ODA initially planned on enrolling 68 students per grade. After we identified our current facility, however, we realized that we would not have the space to support classes of that size. As such, we shifted at the launch of our school to a new enrollment plan, in which we enroll only 50 students per grade (shown in **Figure SM2**).

We initially thought this revised enrollment plan would allow us to stay at 1001 Beech Street as long as needed until we found a permanent facility. As we have come closer to fidelity in our model, however, we have realized that we need a different kind of space (and more space in general). Given the focus on Oxford Tutorial debates between students and teachers, as well as our emphasis on self-directed and peer-to-peer independent learning, we need a larger number of small breakout rooms, as opposed to a smaller number of larger, traditional classrooms. As such, it became clear by the end of the 2018-19 school year that we would not have the space to execute our instructional model with fidelity under the revised enrollment plan in our current facility.

Given this, we submitted documentation to city planning, our school district, and SMCOE in June 2019 notifying all parties of our plan to revise our enrollment a second time (that

Figure SM1. Enrollment Version 1

	2017-18	2018-19	2019-20	2020-21
9th	68	68	68	68
10th		68	68	68
11th			68	68
12th				68
Total	68	136	204	272

Figure SM2. Enrollment Version 2

	2017-18	2018-19	2019-20	2020-21
9th	50	50	50	50
10th		50	50	50
11th			50	50
12th				50
Total	50	100	150	200

Figure SM3. Enrollment Version 3 (current)

	2019-20**	2020-21	2021-22	2022-23	2023-24	2024-25
9th	30	55	55	55	55	55
10th	35	40	55	55	50	50
11th	45	40	40	50	50	50
12th		45	40	40	45	45
Total	110	180	190	200	200	200

*** 2019-20 is from the initial charter term, all others are for the proposed renewal charter term*

documentation is included in this tab of the binder). **Figure SM3** shows our new enrollment projections given the constraints of our current facility, and our plan to grow back to our full enrollment goal of 200 students once we occupy our permanent facility in the 2020-21 school year and beyond.

It is important to note that the enrollment plan in **Figure SM3** makes different assumptions around the number of students enrolled in a grade cohort across the years. (For example, the blue cohort in **Figure SM2** shows 50 students enrolled all four years. By contrast, the same blue cohort in **Figure SM3** shows 30 students enrolled during the 9th grade year, and 40 students enrolled in the 10th - 12th grade years.) These changes will be achieved by us shifting our policies on backfilling grade levels as necessary to ensure that we have alignment between budget, staffing, and cohort needs.

3. The manner in which administrative services are to be provided

Oxford Day Academy has successfully covered its administrative services during its initial charter term through the following partnerships:

- **Financial services:** EdTec provides ODA back office financial supports including budgeting, accounting, and AP management. They partner with Paylocity to cover our payroll services.
- **Benefits:** Ascension is a health benefits brokerage firm that manages ODA's employee health care plans. ODA employees receive healthcare through Kaiser Permanente and vision, dental, and life insurance through ChoiceBuilder. We also provide a private 401k retirement option with employer match through Human Interest.
- **Financial audit:** Clifton Larson Allen has conducted financial audits of our organization for the past two years. We will continue to work with them until we reach the statutory limit.
- **Meals:** Revolution Foods provides daily meal deliveries that are compliant with all relevant state and federal school meal regulations. The School Food and Wellness Group provides administrative support to ensure school-side compliance in the distribution and reporting of meals.
- **Special Education:** ODA serves as its own LEA in the El Dorado SELPA. We have a dedicated, credentialed special education teacher to manage our school's special education caseload, and we contract with third party special education providers as needed (eg, for psychological evaluations, speech and language pathology services, etc.)

As these partnerships have become successful, stable relationships, ODA does not plan to make any changes at this time.

4. Potential Civil Liability Effects

Oxford Day Academy (ODA) will be operated by Oxford Day Academy, Inc. a California non-profit public benefit corporation. This corporation is organized and operated exclusively for

charitable purposes with the meaning of the Section 501(c)(3) of the Internal Revenue Code and California Revenue and Taxation Code Section 23701(d).

Pursuant to Education Code Section 47604(c), an entity that grants a charter to ODA operated by a nonprofit public benefit corporation will not be liable for the debts or obligations of ODA or for claims arising from the performance of acts, errors or omissions by ODA if the authority has complied with all oversight responsibilities required by law. ODA will work diligently to assist San Mateo County Office of Education in meeting any and all oversight obligations under the law, including monthly meetings, reporting, or other District-requested protocol to ensure SMCOE will not be liable for the operation of ODA.

Further, ODA and SMCOE will enter into a Memorandum of Understanding, wherein ODA shall indemnify SMCOE for the action of ODA under this charter.

The corporate bylaws of ODA will provide for indemnification of ODA's Board, officers, agents, and employees, and ODA will purchase general liability insurance, Board Members' and Officer's insurance, and fidelity bonding to secure against financial risks.

As stated above, insurance amounts will be determined by recommendation of SMCOE and ODA's insurance company for schools of similar size, location, and student population. SMCOE will be named an additional insured on the general liability insurance of ODA.

The ODA Board will institute appropriate risk management practices as discussed herein, including screening of employees, establishing codes of conduct for staff and students, and dispute resolution.



Oxford Day Academy
1001 Beech Street
East Palo Alto, CA 94303

June 13, 2019

Planning Division
City of East Palo Alto
1960 Tate Street
East Palo Alto, CA 94303

To Whom It May Concern:

On April 22, 2019, the Planning Commission for the City of East Palo Alto voted to extend our CUP (CUP18-001) to Aug 1, 2020 with capacity to serve 160 students. At the end of the 2018-19 school year, we had 102 students enrolled and originally planned to expand to 150 students in the 2019-20 school year. We've accepted 53 new students for 2019-20, however we're seeing the way limited space at our current site is going to make it difficult to support a full class. As such, we hope to shift our enrollment as follows for the coming (2019-20) school year:

Grade level	Students enrolled as of 6/1/2019	Target enrollment goal for 9/1/2019
9	53	35
10	50	35
11	52	35
Total	155	105

While we'll honor any students' decision to come to our school next year, we're hoping to advise students who could be successful at other schools to go there, such that our goal is to have only 100-120 students next year. We will be certain to update you in early September, when enrollment for the school year is relatively stable. Please let me know if you have any questions prior to that time, as we would be happy to discuss.

Sincerely,

Mallory Dwinal, PhD, MBA
Co-Founder & CEO
Oxford Day Academy