



# 2008-09 Board of Education Strategic Objectives

**August 6, 2008**



# Agenda

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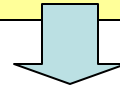
- I. Board's Vision and Goals (45 min)
  - I. Historical Overview
  - II. Expect Success Reforms
  
- II. 2008-09 Superintendent Workplan (30 min)
  - I. 3/9/12 Strategies
  - II. MYFSP
  - III. FCMAT
  - IV. Superintendent Search
  - V. Coherent Governance
  - VI. Summary Calendar
  - VII. Organizational Chart
  
- III. Appendix
  - I. Expect Success Program Breakdown
  - II. Expect Success Budget Breakdown
  - III. Individuals funded by Expect Success private funds in '-08-09



## Below is a summary of OUSD's focus areas from 2002-08.

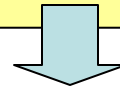
### **2000-2003**

Led by Superintendent Dennis Chaconas, OUSD committed to focusing on early literacy and to creating **small learning communities** through the creation of community driven small schools across the district.



### **2003-2008**

Under state receivership OUSD engaged in **systemic and structural reform** to improve operations to successfully support small learning communities and students.



### **2008-**

We are reviewing and evaluating our key strategies to ensure gains in student achievement and the successful transition back to local control.

***We look forward to working with the Board of Education to affirm our district's focus for 2008 and beyond as we return back to local control.***

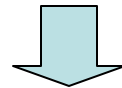


# District Vision

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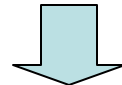
## ***OUSD Strategic Plan Vision/Mission (2002)***

Transform each school into a nurturing community with high standards of learning for every student by name, and our district into a responsive, supportive network with high standards of service.



## ***Expect Success Vision (2005)***

In partnership with our community, we are creating an exceptional public school system with high standards of teaching and learning for every student, and high standards of service to our schools.



## ***Coherent Governance (2008)***

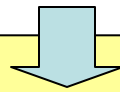
Mega Result (SR 1): All students will graduate as caring, competent and critical thinkers, fully informed, engaged and contributing citizens, prepared to succeed in college and career.



# District Goals

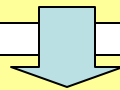
## ***OUSD Strategic Plan Goals (2002)***

1. Complete the requirements for a high school diploma.
2. Read at grade level by the end of grade 3
3. Write at grade level by the end of elementary school.
4. Pass algebra by the end of middle school.
5. Excel in ways that express individual passion and unique talents.



## ***Expect Success Goals (2005)***

1. All students will graduate prepared to succeed in college and the workplace
2. All students will read and write at or above grade level by the end of 3rd grade
3. All students will succeed in Algebra by the end of 9th grade
4. All students and adults will respect one another and work together across cultures.
5. All employees will be high performers.
6. All schools will be clean, healthy, and safe.



## **Board of Education Student Results Policies (2008)**

- Student Result 2 - Academic Achievement All students will meet or exceed rigorous standards in all academic disciplines.
  - Read and write at the end of third grade, success in algebra at the end of ninth grade, graduation
  - Students will explore their own creativity, appreciate artists and art forms and transfer their value to academic, social and cultural experiences
- Student Result 3 - Citizenship: Students take responsibility for themselves and for the common good.
- Student Result 4 - Life & Workplace Skills: Students will possess personal motivation, skills and resiliency necessary for success in life and the workplace.

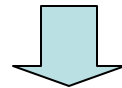


# District Branding

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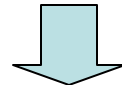
***OUSD Strategic Plan Branding (2002)***

High Standards of Learning. High Standards of Service



***Expect Success Branding (2005)***

Expect Success



***Coherent Governance (2008)***

TBD by the Board of Education



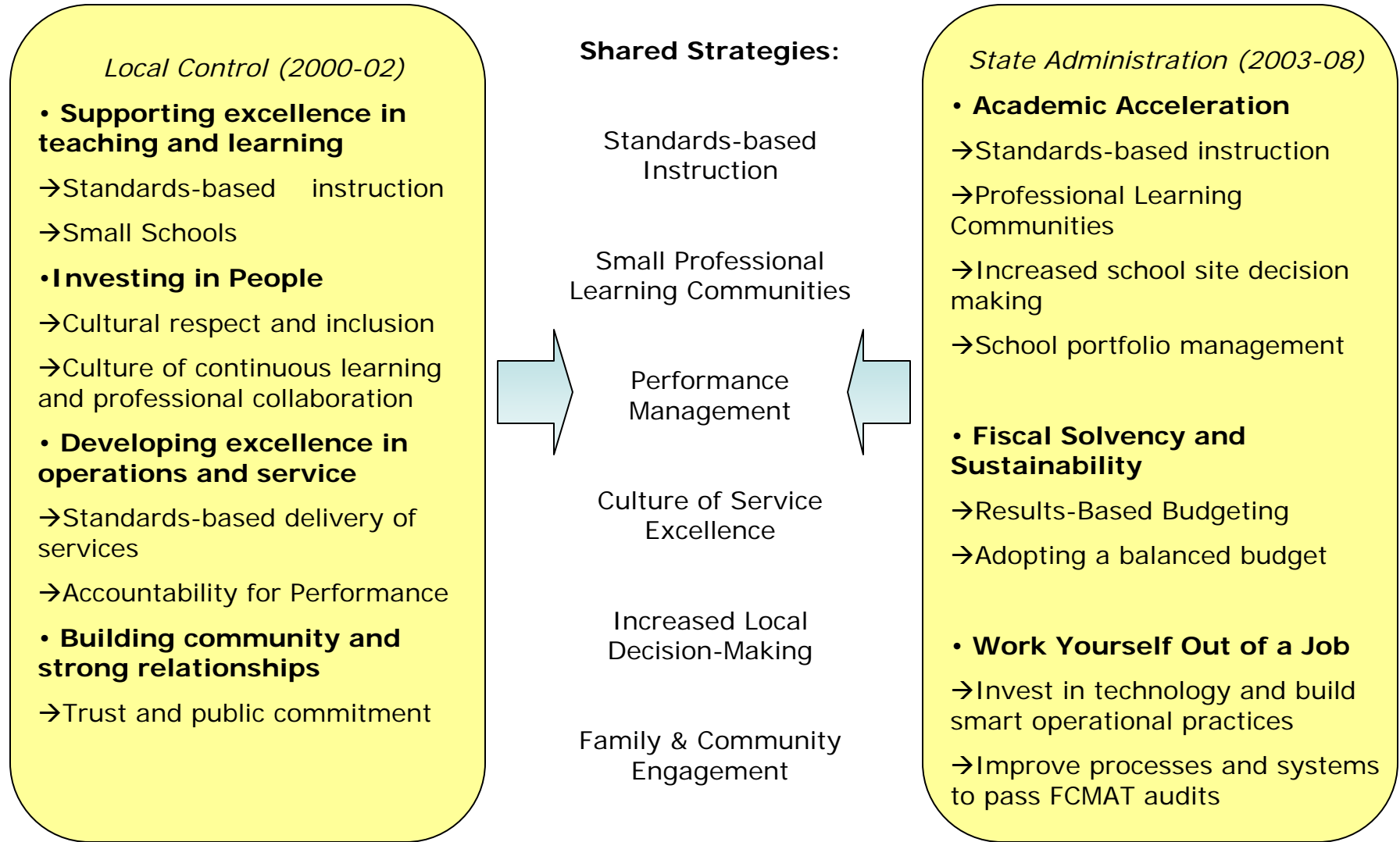
# Genesis of Expect Success

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- Parents and community organizations were upset about the quality of instruction, low student achievement, and the disparity in quality between “hills” and “heartlands”
  - community organizing and advocacy
  - pressure for redesign
  - high standards of teaching and learning goal
  - Charters putting pressures on traditional schools
  - impacts on student achievement
- OUSD staff were upset about the quality of service from central departments to schools and communities felt that schools were neglected
  - community organizing and advocacy
  - pressure for redesign
  - high standards of service to schools goal
  - impacts on perception of quality and impact on student achievement
- The state and the OUSD board were upset about the quality of the District’s budget management and management of fundamental District functions
  - state takeover and state administration
  - pressure for redesign
  - stability as we transition to local governance goal
  - impacts on FCMAT, return to local control, budget and student achievement

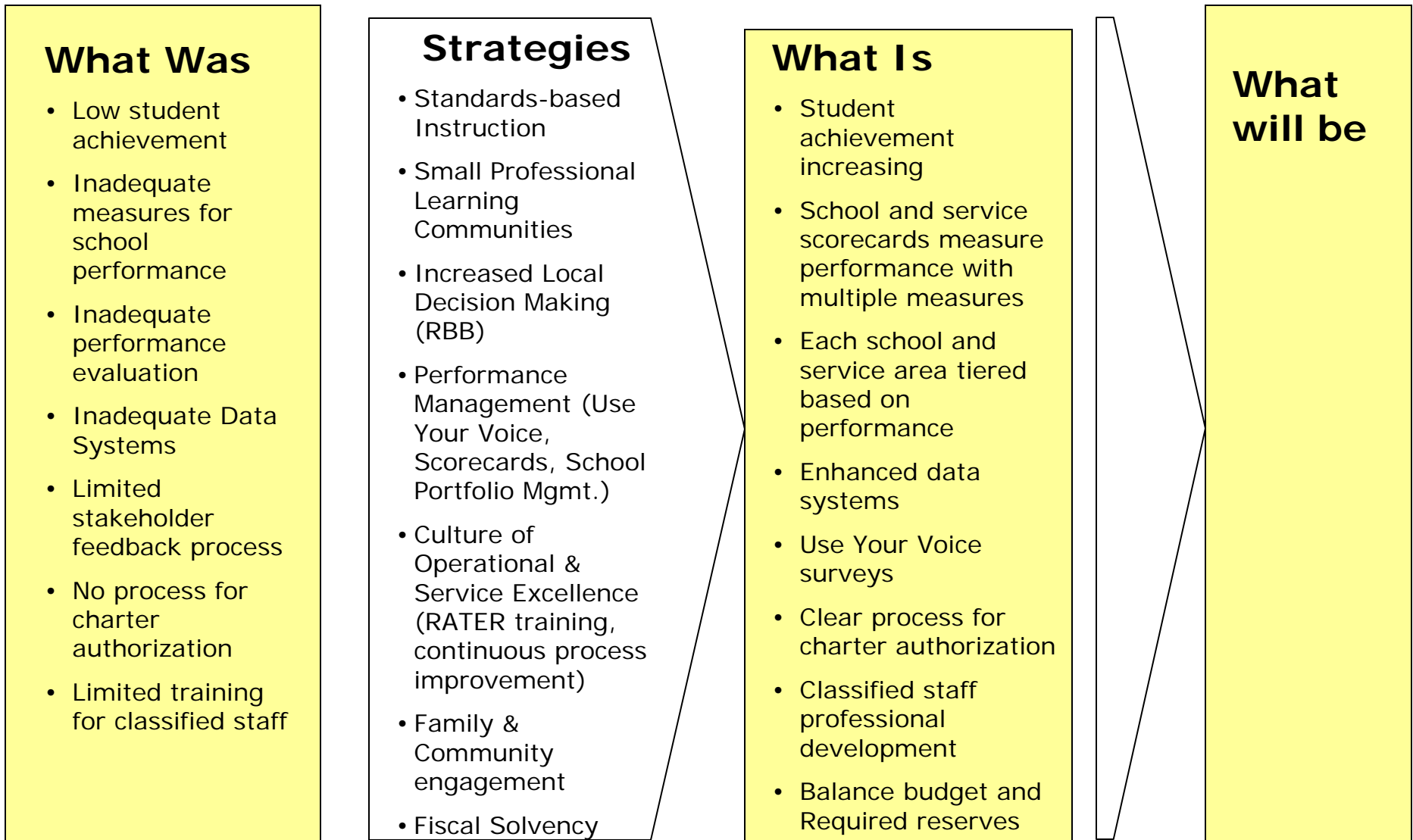


# Our current strategies take the best ideas from local control and state administration.





# Our strategies have resolved some of the issues that we were facing, but the work needs to continue.



## Six Foundational Changes of Expect Success

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- Create an organizational structure with a focus on accelerating achievement and high quality services.
  - Develop a focused educational leadership organization (ELO) with clear priorities and role clarity (board, strategy team, network leaders, principals) to achieve our educational vision.
  - Create two organizations within one district - an educational organization that focuses on teaching & learning and an effective services organization that supports our schools.
- Create a school-based Service Economy linked to Results Based Budgeting that provides increasing levels of funding and flexibility to schools and lets them purchase services and manage their resources.
- Create small, personalized learning communities.
- Operate a dynamic portfolio of schools that allows every family to have access to at least two quality school options in their neighborhood, and the ability to select from a diverse range of educational options throughout Oakland.
- Create a performance management culture and build the capacity of all employees within schools, ELO, and the services organization.
- Redesign core business processes and invest in technology enhancements to improve efficiency and effectiveness.



# Expect Success projects\* support our vision of high standards of teaching and learning and high standards of service to our schools.

High Standards of Teaching & Learning	High Standards of Services to Schools	Infrastructure and Support
<p><b>Guiding Frameworks</b></p> <ol style="list-style-type: none"> <li>1. MAAP (C)</li> <li>2. ComPAS (I)</li> </ol> <p><b>Small Learning Environments</b></p> <ol style="list-style-type: none"> <li>3. Network Model (C)</li> <li>4. 4ncubator Services (I)</li> <li>5. New School Support (O)</li> </ol> <p><b>School Quality and Choice</b></p> <ol style="list-style-type: none"> <li>6. School Portfolio Management (I)</li> <li>7. School Options (I)</li> </ol> <p><b>Professional Development</b></p> <ol style="list-style-type: none"> <li>8. Principals-in-Training (I)</li> <li>9. Principal Leadership Development (C)</li> <li>10. Teacher Coaching Services (I)</li> </ol>	<p><b>Redesign of central office</b></p> <ol style="list-style-type: none"> <li>11. Wave Design (O)</li> <li>12. Recruiting (O)</li> <li>13. Relocation (O)</li> <li>14. Wave Build (O)</li> </ol> <p><b>Creation of new service areas</b></p> <ol style="list-style-type: none"> <li>15. Complementary Learning (I)</li> <li>16. Operations Support (I)</li> </ol> <p><b>Service culture and quality</b></p> <ol style="list-style-type: none"> <li>17. Service Delivery (Service Economy) (I)</li> </ol> <p><b>Classified Professional Development</b></p> <ol style="list-style-type: none"> <li>18. Staff Investment (C)</li> </ol>	<p><b>Data Driven Culture</b></p> <ol style="list-style-type: none"> <li>19. Performance Management (C)</li> </ol> <p><b>Financial Sustainability</b></p> <ol style="list-style-type: none"> <li>20. Investment Framework (I)</li> </ol> <p><b>Technology</b></p> <ol style="list-style-type: none"> <li>21. Wave 3 IT Design (O)</li> <li>22. IT Support (C)</li> </ol> <p><b>Project Mgmt &amp; Change Mgmt</b></p> <ol style="list-style-type: none"> <li>23. Transformation Mgmt. (C)</li> <li>24. Strategic Projects (C)</li> <li>25. BayCES (O)</li> <li>26. Communications (O)</li> <li>27. Community Engagement (I)</li> <li>28. Board Engagement (C)</li> </ol>

\*Note: Projects ranged from \$10,000 - \$10M

Legend –

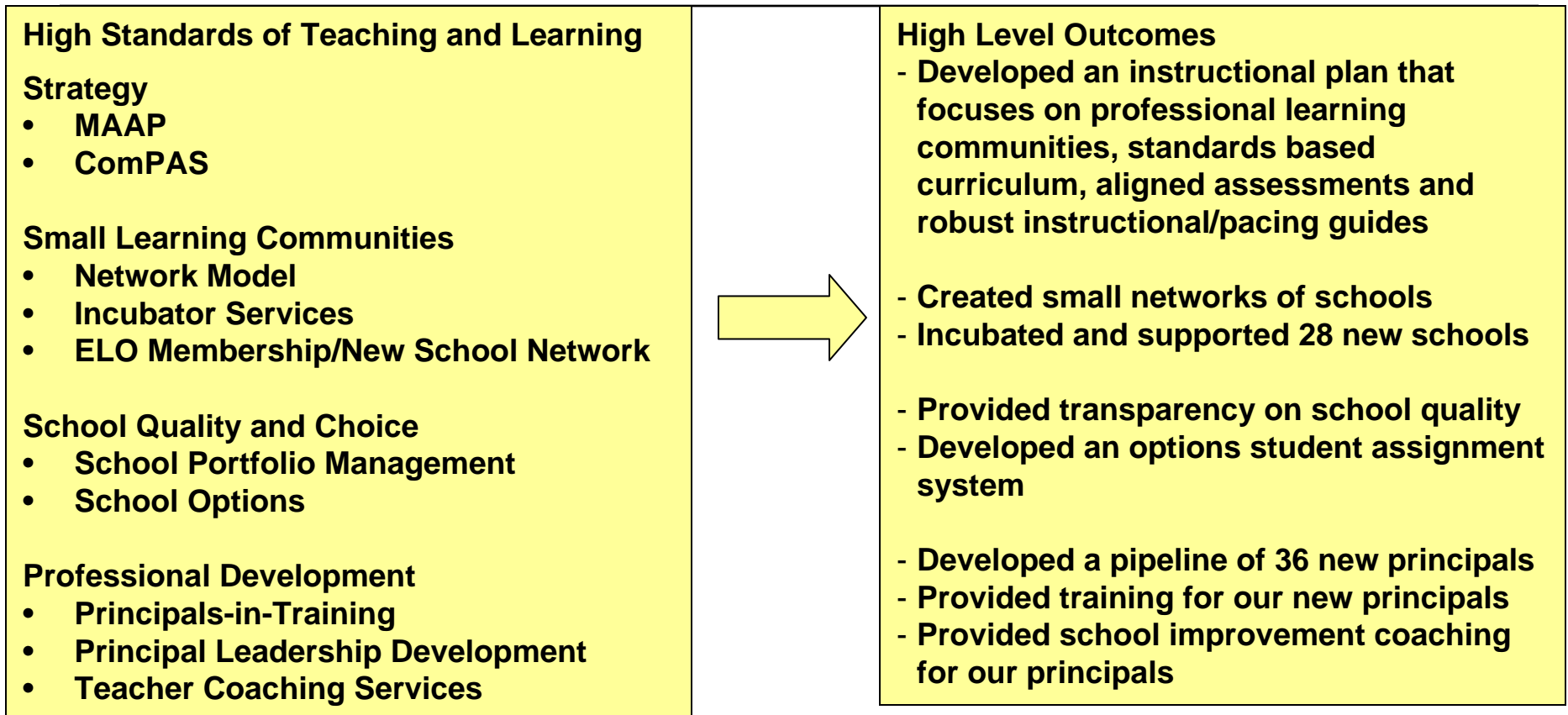
O = One time expense

I – Integrated

C = Continuing using private funding in '08-09



## Programs supporting high standards of teaching and learning

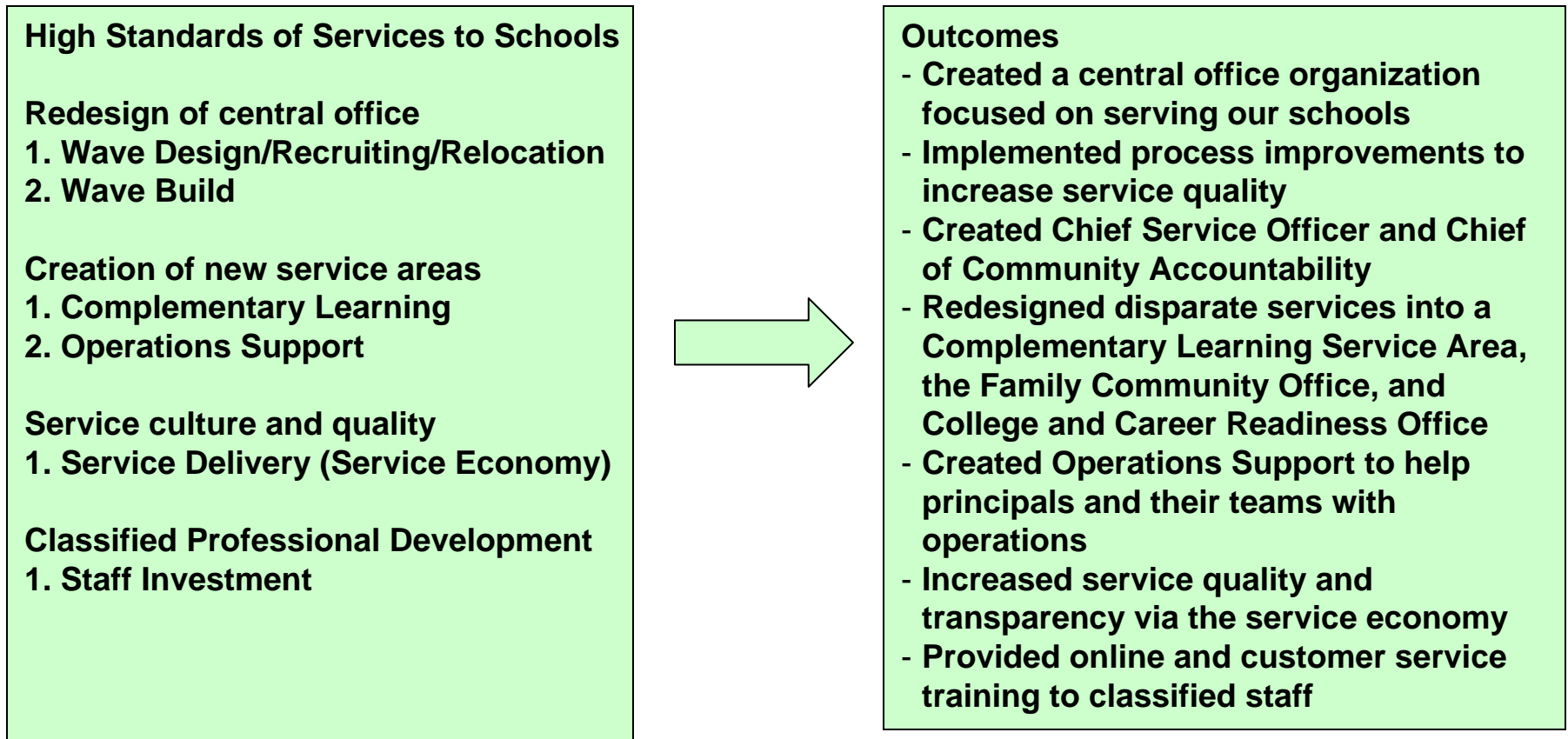


'04-05 Actual	'05-06 Actual	'06-07 Actual	07-08 Estimate	08-09 Budget	Total Budget
\$ 13,760	\$ 3,184,197	\$ 4,443,302	\$ 3,304,372	\$ 490,000	\$ 11,435,631

\*Expect Success total project budget supporting teaching and learning includes private funding (\$10,293,966) and an OUSD match of (\$1,106,500)



## Projects supporting high standards of service to our schools

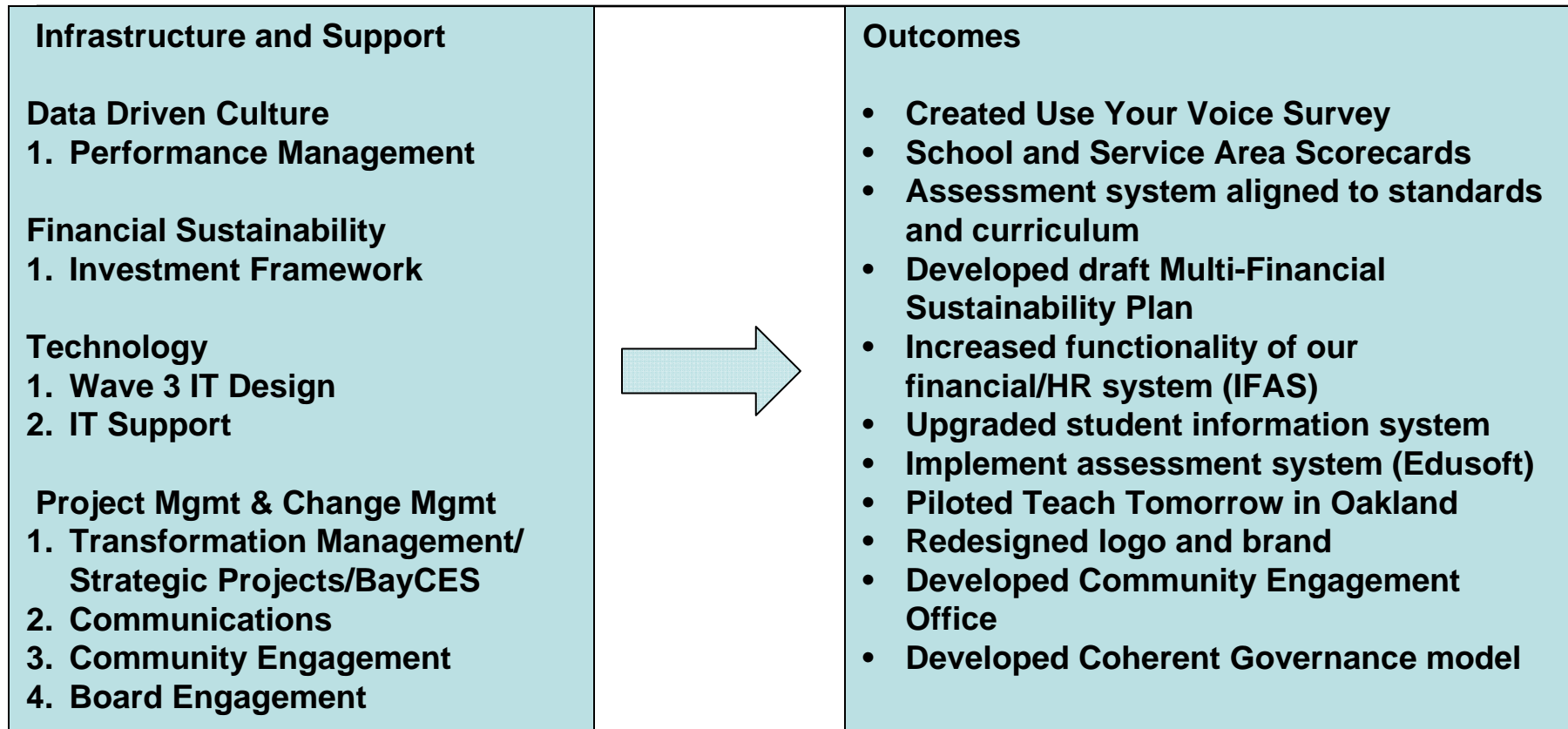


'04-05 Actual	'05-06 Actual	'06-07 Actual	07-08 Estimate	08-09 Budget	Total Budget
\$ 84,400	\$ 1,598,375	\$ 2,396,988	\$ 2,597,790	\$ 230,000	\$ 6,907,553

\*Expect Success total project budget for high standards of service includes private funding (\$6,647,581) and OUSD match (\$626,000)



## Infrastructure and support projects



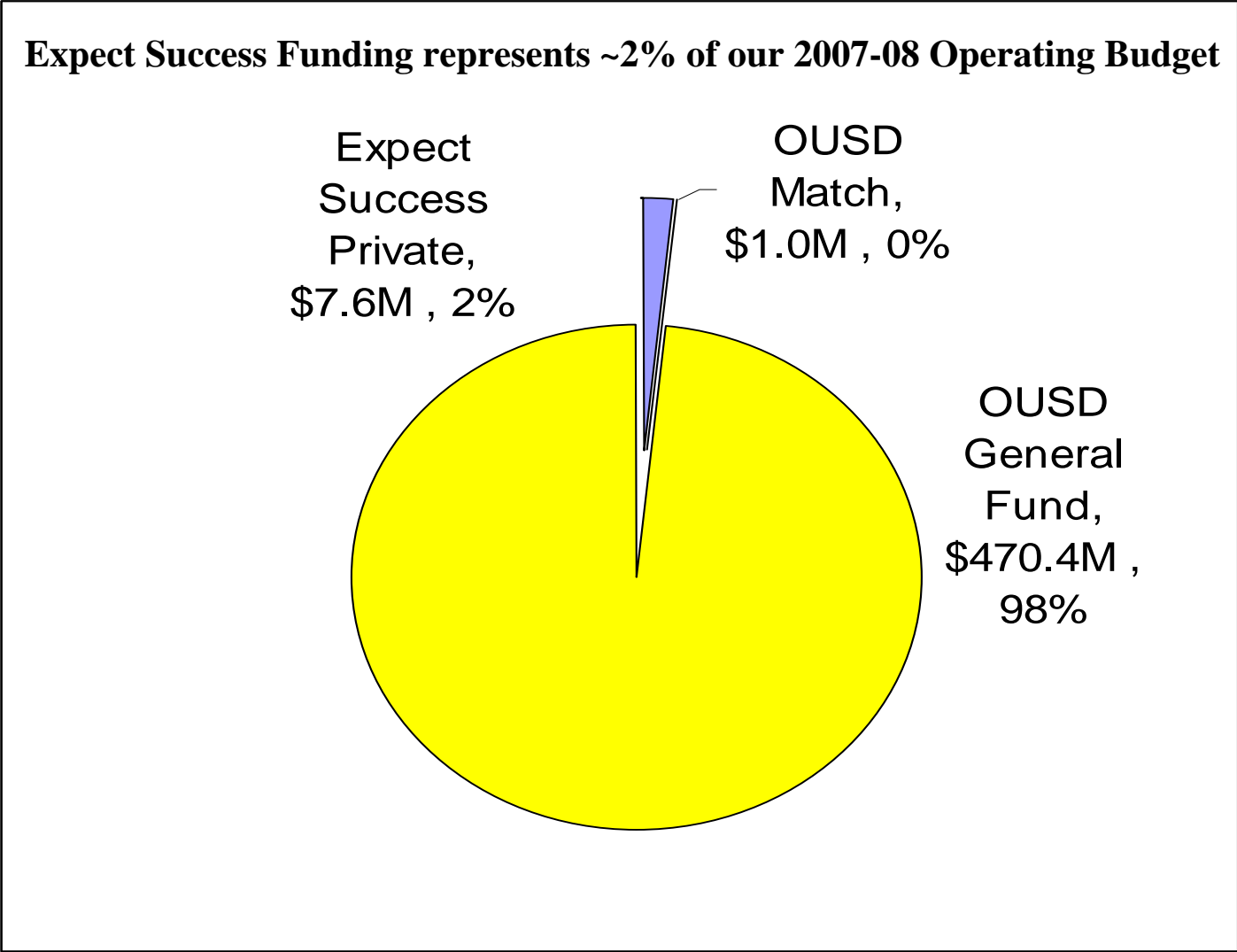
'04-05 Actual	'05-06 Actual	'06-07 Actual	07-08 Estimate	08-09 Budget	Total Budget
\$ 2,881,175	\$ 5,922,139	\$ 6,000,260	\$ 3,397,060	\$ 6,756,182	\$ 24,956,816

\*Expect Success total project budget for infrastructure and support includes private funding (\$11,283,316) and OUSD match (\$13,673,500\*\*)

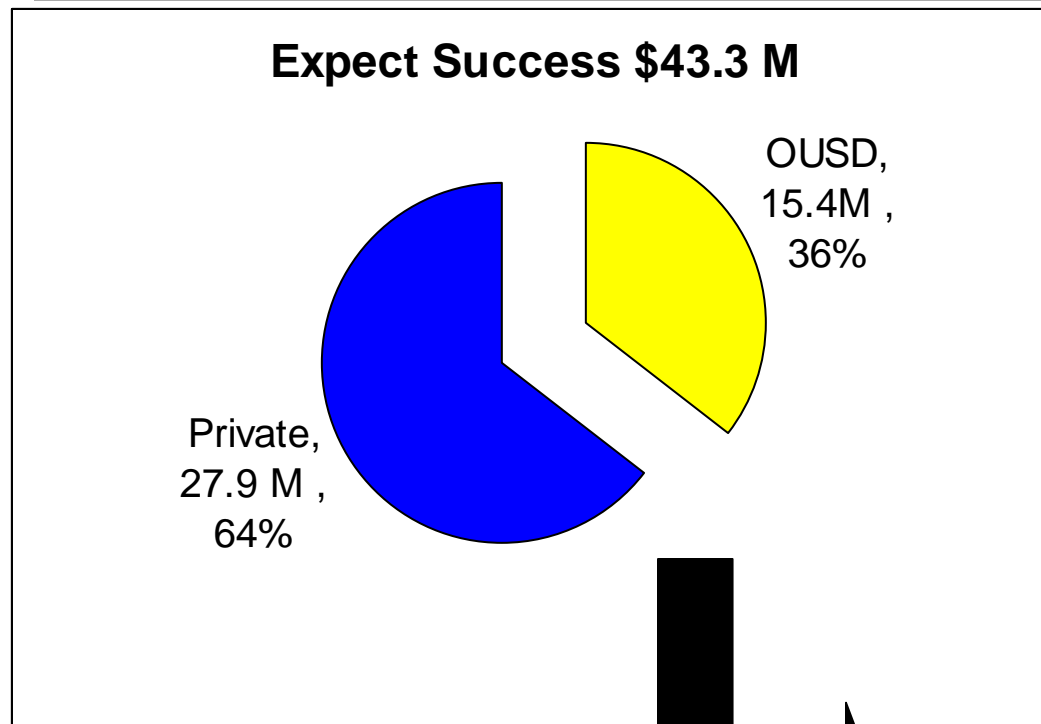
\*\* \$3 Million of match will be budgeted in '09-10 using the State Loan for IT upgrades



**We have been able to make a significant impact with a very limited amount of Expect Success funding.**



## Expect Success total budget breakdown (private funding and OUSD match)



### Private Breakdown (\$27.9M)

Bill and Melinda Gates: \$9.9M

Broad Foundation: \$6.0M

Michael and Susan Dell: \$5.6M\*

Local Funders: \$6.4M

\*Total MSDF funding is \$6.2M. They have just awarded us a grant that takes us over our initial Expect Success budget of \$27.9 M





# Expect Success total budget of \$43.3 M (private funding and OUSD match)

\* '07-08 & '08-09 numbers will not be finalized until 9/10/08

Program & Number	'04-05 Actual	'05-06 Actual	'06-07 Actual	07-08 Estimate	08-09 Budget	09-10 Budget	Total Budget
9401 - Operations Support	\$ 26,400	\$ 887,788	\$ 1,052,274	\$ 285,888	\$ -		\$ 2,252,350
9402 - Community Engagement	\$ -	\$ 81,967	\$ 222,965	\$ -	\$ -		\$ 304,932
9403 - Strategic Projects	\$ -	\$ 77,616	\$ 84,660	\$ -	\$ -		\$ 162,276
9404 - Incubator services	\$ -	\$ 326,747	\$ 274,584	\$ 286,939	\$ -		\$ 888,270
9405 - Principal leadership	\$ -	\$ -	\$ 104,392	\$ 227,153	\$ 116,685		\$ 448,231
9406 - Teacher coaching services	\$ -	\$ 90,000	\$ 283,017	\$ 58,148	\$ -		\$ 431,164
9407 - School options	\$ 13,760	\$ 176,234	\$ 26,550	\$ -	\$ -		\$ 216,544
9408 - Staff investment	\$ -	\$ 15,000	\$ 336,986	\$ 511,980	\$ 230,000		\$ 1,093,966
9409 - Network model	\$ -	\$ 15,437	\$ 80,508	\$ 168,331	\$ 50,000		\$ 314,277
9410 - MAAP	\$ -	\$ 145,146	\$ 712,657	\$ 722,385	\$ 200,000		\$ 1,780,187
9411 - Service Delivery	\$ -	\$ 5,200	\$ 79,373	\$ -	\$ -		\$ 84,573
9412 - EO Performance Mgmt	\$ 711,118	\$ 1,846,380	\$ 1,709,294	\$ 297,027	\$ 817,586		\$ 5,381,405
9413 - Expect Success! IT support	\$ 2,024,497	\$ 2,905,595	\$ 2,714,536	\$ 1,224,167	\$ 1,991,000	\$ 3,077,073	\$ 13,936,868
9414 - Wave 3 IT design	\$ -	\$ -	\$ 98,801	\$ 66,615	\$ -		\$ 165,416
9415 - Portfolio Mgmt	\$ -	\$ 393,320	\$ 810,511	\$ 517,711	\$ -		\$ 1,721,542
9416 - Redesign recruiting	\$ -	\$ 60,304	\$ 21,915	\$ -	\$ -		\$ 82,219
9417 - Relocation	\$ -	\$ 10,000	\$ -	\$ -	\$ -		\$ 10,000
9418 - Wave 2/3 redesign	\$ 52,000	\$ 266,904	\$ 609,204	\$ -	\$ -		\$ 928,108
9419 - Wave build (1-3)	\$ 6,000	\$ 353,179	\$ 239,158	\$ 1,299,922	\$ -		\$ 1,898,259
9420 - Transformation Mgmt	\$ 8,452	\$ 275,523	\$ 363,486	\$ 1,045,273	\$ 895,640		\$ 2,588,373
9421 - Board engagement	\$ -	\$ -	\$ 16,000	\$ -	\$ 40,000		\$ 56,000
9422 - ComPAS	\$ -	\$ -	\$ 62,532	\$ 76,491	\$ -		\$ 139,024
9423 - SO Performance Mgmt	\$ -	\$ 98,335	\$ 167,194	\$ -	\$ -		\$ 265,529
9424 - ELO membership	\$ -	\$ 1,024,646	\$ 983,027	\$ 432,091	\$ -		\$ 2,439,764
9425 - Investment framework	\$ -	\$ -	\$ 62,261	\$ 226,602	\$ -		\$ 288,863
9426 - Principals-in-training salaries	\$ -	\$ 1,012,667	\$ 1,105,524	\$ 815,122	\$ 123,315		\$ 3,056,628
9427 - Communications	\$ -	\$ -	\$ 141,456	\$ 310,554	\$ -		\$ 452,010
9428 - Comp Learning	\$ -	\$ -	\$ 58,078	\$ 500,000	\$ -		\$ 558,078
BayCES - BayCES start-up	\$ 137,108	\$ 636,723	\$ 419,609	\$ -	\$ -		\$ 1,193,440
Estimated Carryover	\$ -	\$ -	\$ -	\$ -	\$ 161,705		\$ 161,705
<b>Grand Total</b>	<b>\$ 2,979,335</b>	<b>\$ 10,704,711</b>	<b>\$ 12,840,550</b>	<b>\$ 9,072,399</b>	<b>\$ 4,625,932</b>	<b>\$ 3,077,073</b>	<b>\$ 43,300,000</b>



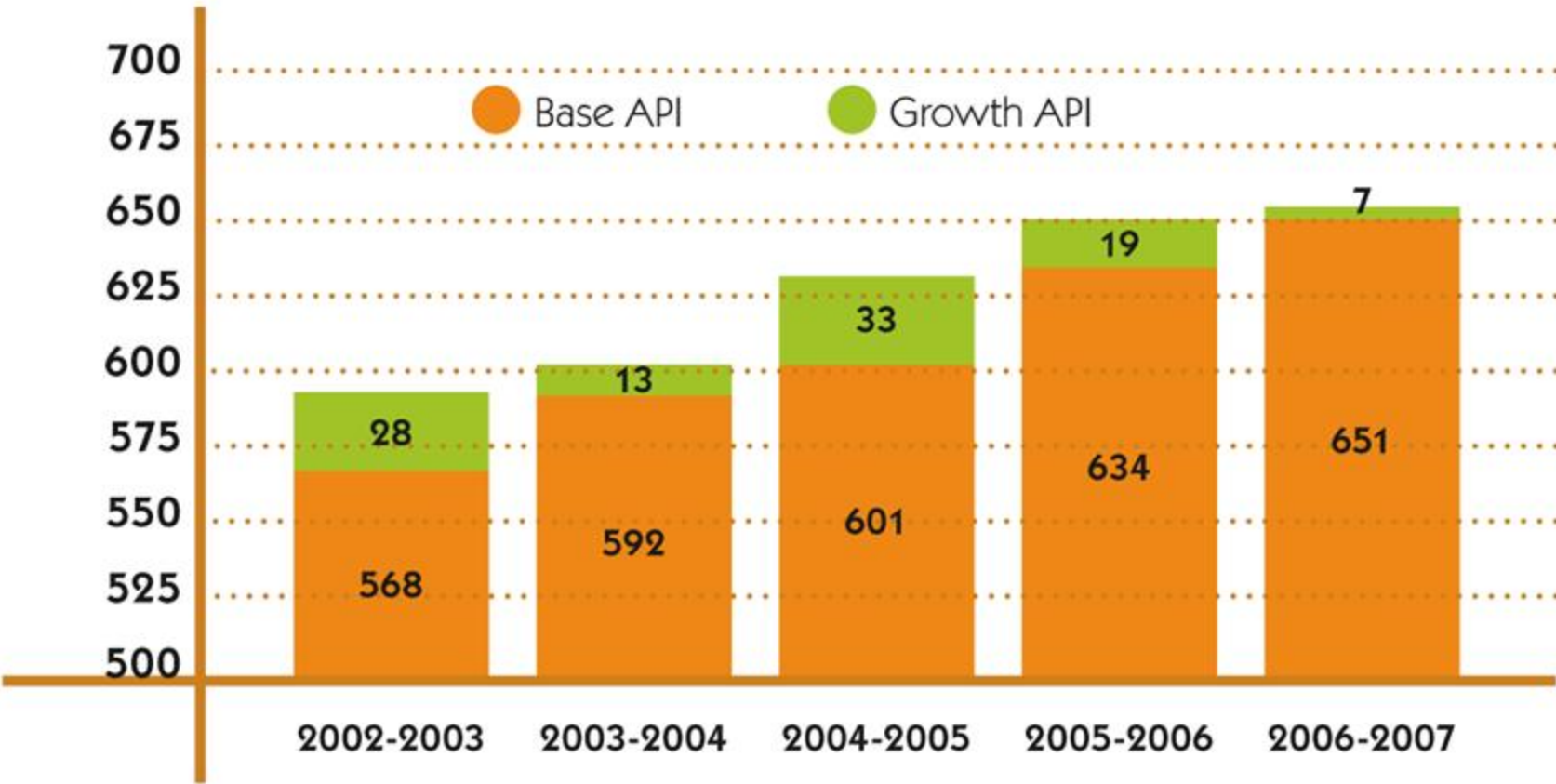
# Expect Success funding focused on educating students by supporting staff, improving service to schools, and empowering our community

	Teaching and Learning	Service to Our Schools	Infrastructure
<b>Students</b>	<ul style="list-style-type: none"> <li>• Results Based Inquiry - student results and data drive staff improvement</li> <li>• Continuous Process Improvement for staff, focused on students</li> <li>• Increased professional development for school site staff</li> <li>• College &amp; Career Readiness committee</li> <li>• Develop student leadership (meaning student engagement)</li> </ul>	<ul style="list-style-type: none"> <li>• Operations Support Coaches enable principals and teachers to spend more time on teaching students.</li> <li>• Service Economy and customer service culture has lead to: cleaner and safer schools, healthier foods, increased staff customer service</li> </ul>	<ul style="list-style-type: none"> <li>• Performance Management holds all staff accountable for student results</li> <li>• Board of Education's Coherent Governance Policy ensures all work is focused on student outcomes</li> </ul>
<b>Teachers</b>	<ul style="list-style-type: none"> <li>• Professional Learning Communities</li> <li>• Increased used of research and student data to improve instruction</li> <li>• Increased participation in and access to professional development</li> </ul>	<ul style="list-style-type: none"> <li>• New Teacher Supports</li> <li>• Principals are trained to better support teachers as instructional leaders</li> <li>• Online professional development tools</li> <li>• Coaching support for teachers</li> </ul>	<ul style="list-style-type: none"> <li>• Increased recruitment from local source Teach Tomorrow in Oakland</li> </ul>
<b>Principals</b>	<ul style="list-style-type: none"> <li>• Professional Learning Communities</li> <li>• Coaching for principals: Instructional, Leadership, and operational</li> <li>• Increased effective recruitment pipelines</li> </ul>	<ul style="list-style-type: none"> <li>• Increased budgeting flexibility through Results Based Budgeting</li> <li>• Operation Support Coaches</li> <li>• <i>On Track</i> professional development system</li> </ul>	<ul style="list-style-type: none"> <li>• Development of online deliverables calendar</li> <li>• School Scorecards analyze student data which staff use to improve instruction</li> </ul>
<b>Classified Employees</b>	<ul style="list-style-type: none"> <li>• Allowing school staff and community members to demand high standards of service via <i>Use Your Voice</i> and Service Org Scorecards</li> </ul>	<ul style="list-style-type: none"> <li>• Service Economy - increased accountability and improved service</li> <li>• Focus on continually improving processes and providing more training to staff</li> </ul>	<ul style="list-style-type: none"> <li>• Service Area Improvement Plans, Scorecards, and <i>Use Your Voice</i></li> <li>• Achieving Service Excellence training for all employees that provide services to schools</li> <li>• Information Technology redesign increases knowledge sharing and easier access to key information</li> </ul>
<b>Community &amp; Families</b>	<ul style="list-style-type: none"> <li>• Open enrollment process (school options)</li> <li>• New schools provide more choices fro parents to choose from</li> <li>• Access to data regarding school performance</li> <li>• Family &amp; Community engagement at all school sites</li> </ul>	<ul style="list-style-type: none"> <li>• Parent Leadership Conference</li> <li>• Options Fair</li> <li>• Creation of Family Community Office</li> <li>• Development of school site parent centers</li> </ul>	<ul style="list-style-type: none"> <li>• Community Meetings at school sites</li> </ul>

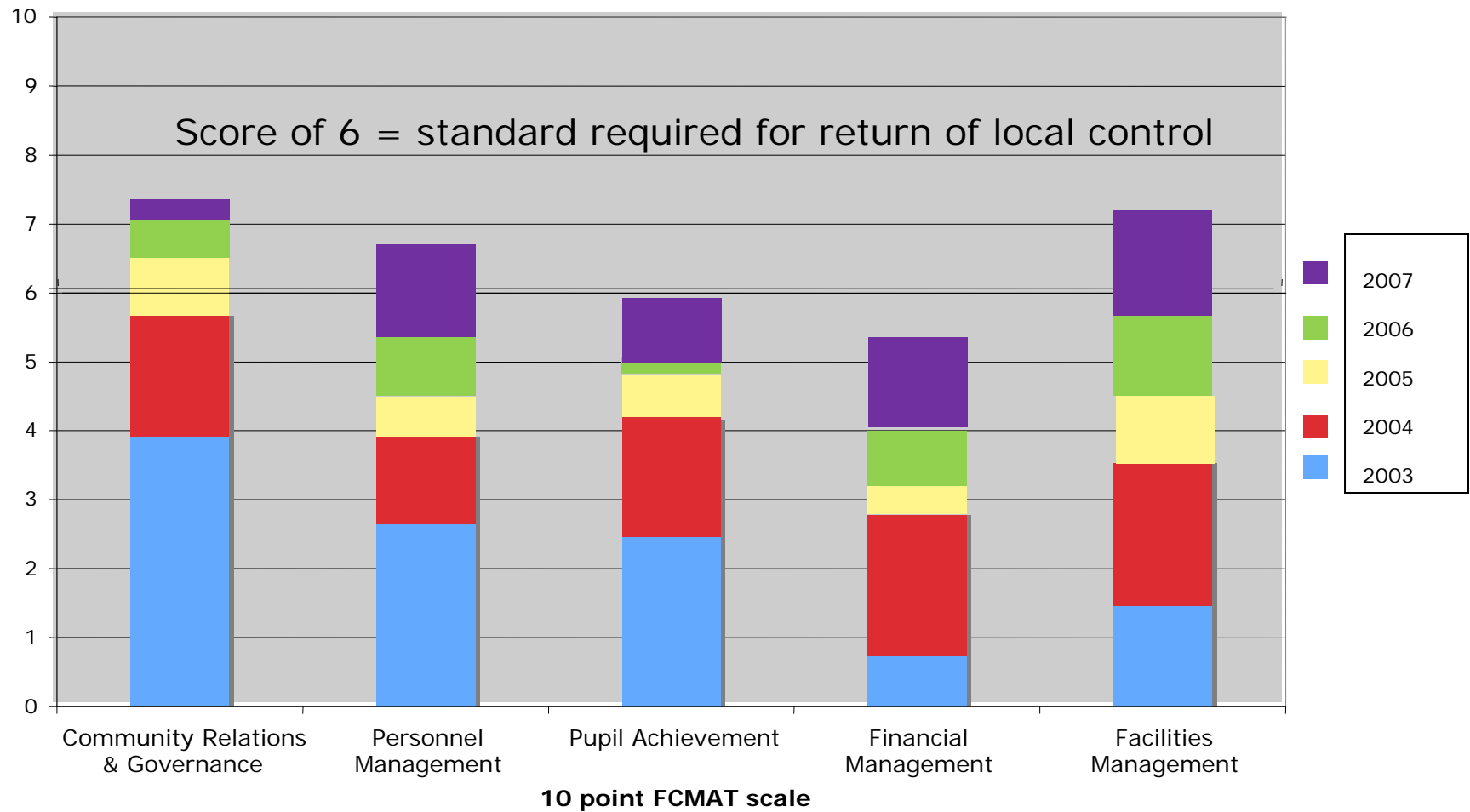


# Academic Results

FIGURE 1. API GROWTH



# FCMAT Progress



## Use Your Voice Service Satisfaction - RATER

Service Area	05-06	06-07	07-08	% Growth '06 or '07 to '08
Adult & Career Education	NA	NA	88%	NA
Research & Assessment	44%	56%	80%	82%
Operations Support Services	55%	95%	79%	44%
Technology Services	NA	58%	73%	26%
Instructional Services	39%	60%	68%	74%
Nutritional Services	NA	53%	67%	26%
Procurement and Distribution	NA	59%	67%	14%
Facilities – Buildings and Grounds	NA	41%	57%	39%
Special Education	NA	38%	56%	47%
Facilities – Custodial	NA	32%	55%	72%
Financial Services	59%	38%	54%	-8%
Complementary Learning	NA	NA	52%	NA
Family Community Office	NA	NA	52%	NA
Human Resources	27%	43%	49%	81%
Attend and Achieve	NA	NA	38%	NA



## Private Funding for Strategic Projects in '08-09 will be ~\$4.2M

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Budget allocation is based on grant agreement obligations:

- Performance management \$2.2 Million (new funding)
  - Improving our school inquiry process
  - Continuing our process improvement work within the Service Org
  - Expanding our evaluation systems
  - Refining our assessment systems
  - Enhancing our Data Warehouse
- Investing in Our People \$884,200 (carryover)
  - Expand Achieving Service Excellence training (RATER)
  - Expand Teach Tomorrow in Oakland Program
  - Pilot new teacher solutions and support services program
  - Providing Operation Coaching services to 1<sup>st</sup> year principals
  - Continue development of online training programs and tools
  - Continue professional development with Network Officers
- Information Technology \$491,000 (new funding/carryover)
  - Redesign our internet and intranet to provide greater access to our students, parents, community and employees
- Professional Learning Communities & College and Career Readiness \$200,000 (carryover)
  - Continue support for the expansion of Professional Learning Communities
  - Continue to evaluate and identify college and career readiness programs
- Strategic Planning and Project Management \$531,440 (carryover)



**Based on feedback we have received we will be evaluating the following areas this year via our Student Results reports, Operating Expectation reports, and Multi-Year Financial Sustainability Plan (MYFSP)**

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- Academic Strategies via the Student Results policies
- Performance Management via the Student Result and Operating Expectation reports
- Results Based Budgeting via MYFSP
- Small Schools via MYFSP
- Service Economy via MYFSP



## Evaluation Process for Key Reforms

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Step 1: Internal data analysis

Step 2: External evaluators

- Small Schools via Stanford's SRN & Linda Darling –Hammond
- RBB via American Institutes for Research (AIR)

Step 3: Stakeholder input

- Labor Relations meeting
- Principal Advisory Committee & monthly administrator luncheons w/ Dr. Mayor
- Teacher Central Office dialogue meetings
- Community forums

Step 4: Board of Education review of recommendations

Step 5: Revisit step 1-3 as necessary

Step 6: Final recommendations presented to Board of Education





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## Superintendent Workplan and Timeline



## 3/9/12 Key Strategies - Graduating Ready for College & Career

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- **Small, Personalized Learning Communities** - Creating structures in which students are known well and improved guidance and monitoring keeps them in school and on track for graduation.
- **Writing Proficiency Initiative** - Improving instruction and assessment of writing at each grade level. Goal of PK-12 system culminating in a rigorous Senior Project.
- **College Awareness and Planning** - Partnerships with College Summit, UC Berkeley, Peralta and others to create college-going PK-12 school cultures and provide teacher training to better help students plan for, visit, apply, and stay focused on college.
- **Career Academies and Internships** - Provide high quality academy pathways and Regional Occupation Program (ROP) courses. Increase internship opportunities by expanding partnerships with the City of Oakland and others.



## 3/9/12 Key Strategies - Success in Algebra by end of Grade 9

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- **Improve Elementary Mathematics Instruction** - Improve teacher understanding of mathematical concepts and instructional strategies that promote student success in math. Significantly expand new elementary math program, which includes complete curriculum, assessments, teacher professional development, and interventions to build student proficiency in basic operations.
- **Improve Access to Algebra** - Continue to increase the number of students taking Algebra 1, and ensure quality Algebra readiness curriculum and intervention programs at all middle schools. Expand summer Algebra institutes for rising 8th and 9th grade students below grade level and struggling with key Algebra-based standards.
- **Improve Algebra Instruction and Assessment** - Continue development of standards-based concept lessons that involve collaborative problem solving and higher order thinking skills. Increase support for new and struggling Algebra teachers, including team teaching, coaching. Create modular approach to Algebra, so students retake only what they haven't mastered.



## Key Strategies - Reading & Writing by End of Third Grade

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- **Effective Literacy Instruction** - Deepen teacher expertise through site-based coaching and collaborative, results-based inquiry.
- **Academic English and Standard English Learner Proficiency** - Continue to build skills of teachers, coaches and principals to provide culturally responsive pedagogy, using specific strategies for Academic English development.
- **ELD and English Learner Proficiency** - Continue supporting teacher use of frontloading and other strategies to make academic content more accessible to EL students. Continue and strengthen explicit ELD instruction and improve 6-12 ELD pathways to speed access to core academic content.
- **Early Response to Intervention K-2** - Expanding the partnership between Programs for Exceptional Children and regular education primary teachers to use progress monitoring and early intervention to address learning gaps, keep students on track, and reduce special education referrals.
- **Increase Access to Early Childhood Education** - continue to expand PreK programs and ensure implementation of kindergarten transition plans.



## Multi-Year Financial Sustainability Plan Timeline

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- 9/3 – Financial Planning (OE 7) and Financial Administration (OE 8)
- 9/10 – '07-08 Closing of the Books
- **10/1 – Small Schools Financial Analysis**
- October – December Community forums on Small Schools & RBB
- **11/5 – Results Based Budgeting Analysis**
- 12/3 – Second draft of MYFSP
- 12/12 & 12/13 - BOE Retreat – setting strategic priorities for 2009-10
- 12/17 – '08-09 Interim Budget Report
- January – BOE Budget Working Sessions
- 1/7 – Implementation of approved modifications to RBB & School Changes
- 1/28 – Third/Final Draft MYFSP



## FCMAT Calendar

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- 10/1 – 10/3: FCMAT review of Financial Management
- 10/12 – 10/15: FCMAT review of Pupil Services
- Sept-Oct: Internal review of Community Relations, Facilities, and Personnel
- Early Dec: FCMAT report to Board of Education



## Superintendent Search Calendar

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- September: Draft Request For Proposal (RFP) for hiring a search firm submitted to Board of Education
- End September: RFP posted
- October: Review proposals and select search firm
- November-December: Community Forums
- January: Advertise Vacancy
- End of February: Close application window
- March: Paper Screening
- April: Selection of Superintendent



## Coherent Governance Calendar

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- Reports will be submitted according to the Board adopted work calendar

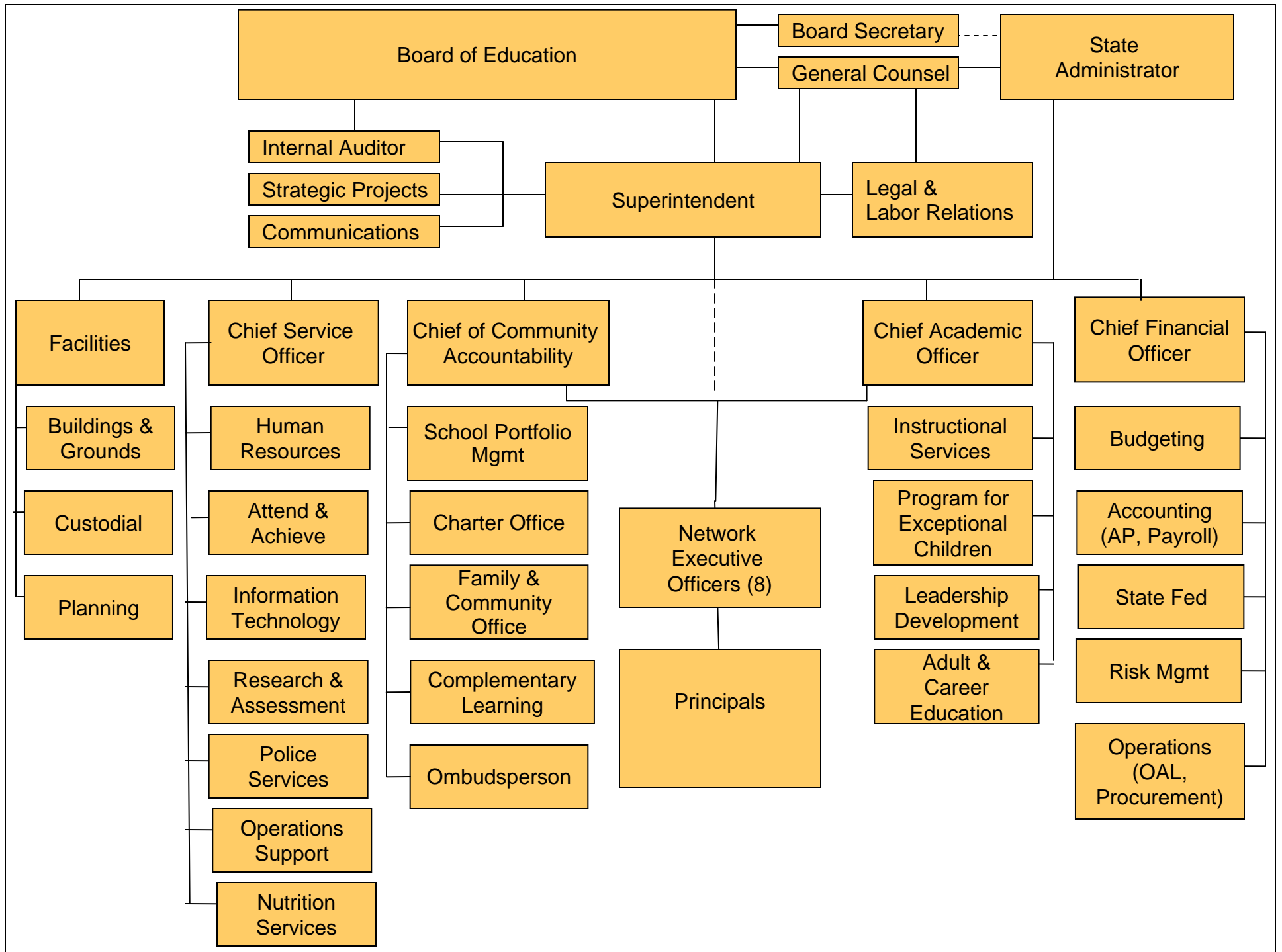




## Proposed Calendar

Activity/Area	Sept	Oct	Nov	Dec	Jan
3/9/12 Academic Goals	Star Results 9/10	SR 2 10/1	SR 3 & 4 11/5		
Multi Year Financial Sustainability	Closing the books	Small Schools 10/1	RBB 11/5	1 <sup>st</sup> interim 2 <sup>nd</sup> Draft MYFSP	School & RBB Changes
FCMAT		Finance & Pupil	Internal Review	FCMAT Results	
Superintendent Search	RFP	Select Firm	Community Forums	Community Forums	Post Vacancy
Coherent Governance	OE 7 &8			OE12, 13, & 14	OE 6 &11
Performance Management					Review
Board of Education Retreat				12/12 & 12/13	





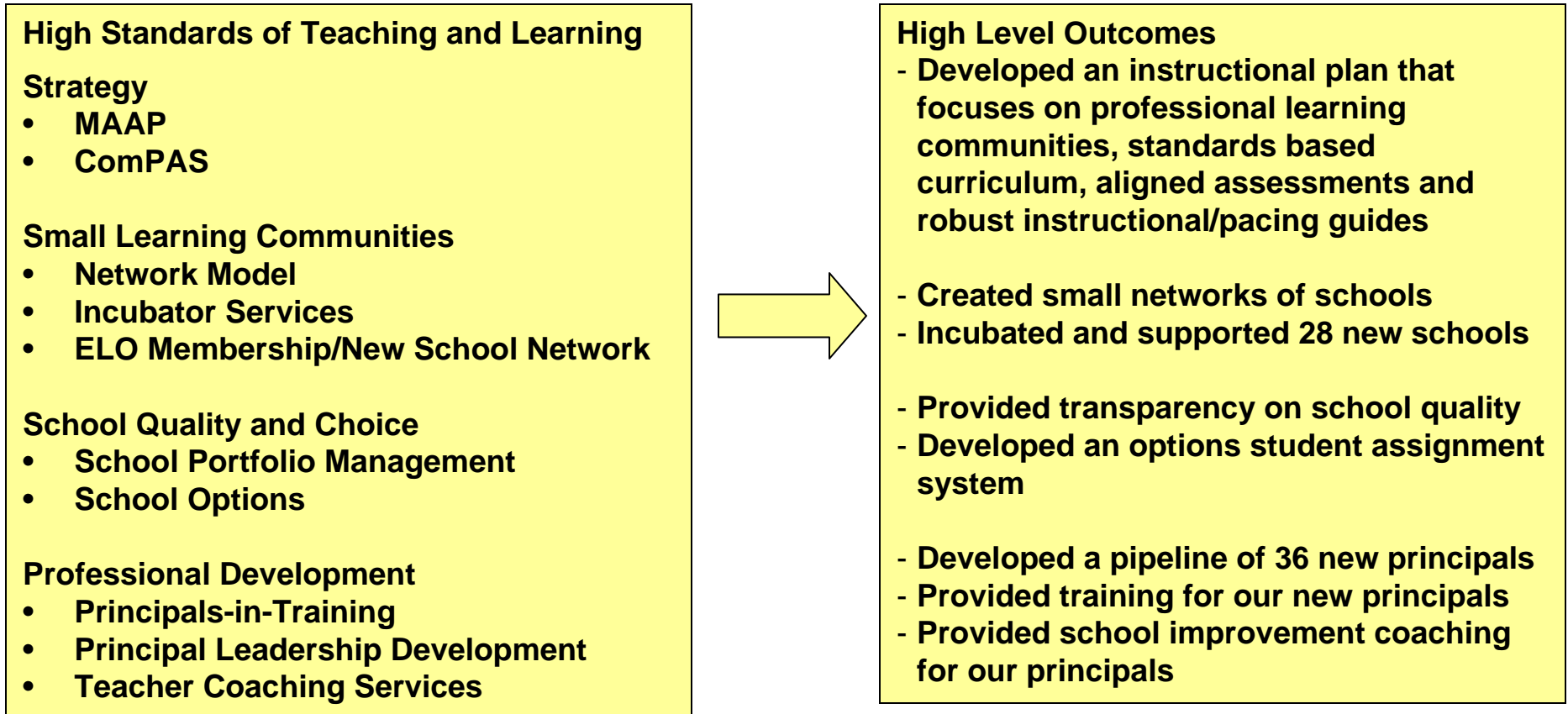
## Appendix

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- Expect Success project breakdown
- Expect Success budget breakdown by funding source
- Employees & consultants working funded by Expect Success private funding in 2008-09.



## Programs supporting high standards of teaching and learning



'04-05 Actual	'05-06 Actual	'06-07 Actual	07-08 Estimate	08-09 Budget	Total Budget
\$ 13,760	\$ 3,184,197	\$ 4,443,302	\$ 3,304,372	\$ 490,000	\$ 11,435,631

\*Funding includes private funding (\$10,293,966) and OUSD match (\$1,106,500)



## Multi-Year Academic Acceleration Plan (MAAP)

**Vision: Teachers and principals in OUSD have the inspiration, guidance, resources, and support that they need to effectively and continuously accelerate student achievement. MAAP establishes the guidelines and broad strategies that accelerate this student learning.**

How Dollars Were Spent Annually (\$1,780,187)		
<b>2005-06 (A)</b>	\$145,146	<ul style="list-style-type: none"> <li>• Researched best practices on instructional frameworks</li> </ul>
<b>2006-07 (A)</b>	\$712,657	<ul style="list-style-type: none"> <li>• Developed Network Executive Officer role and strategic practices</li> <li>• Revised curriculum management plan per FCMAT</li> <li>• Developed professional development plan &amp; coaching manual per FCMAT</li> </ul>
<b>2007-08 (E)</b>	\$722,385	<ul style="list-style-type: none"> <li>• Designed and implement 2-year Professional Learning Community (PLC) training</li> <li>• Developed draft College and Career Readiness</li> <li>• Created instructional guides for ELA, Math, and Science per FCMAT</li> </ul>
<b>2008-09 (B)</b>	\$200,000	<ul style="list-style-type: none"> <li>• With our \$200k carryover we will continue the development of our Professional Learning Communities, finish our World History instructional guides and continue the development of our College and Career Readiness programs.</li> <li>• The rest of the work has been integrated into the district</li> </ul>



## Community Plan for Accountability in Schools (ComPAS)

**Vision: Develop a culture and structure for schools, families and the community to co-own and share responsibility for the academic success and personal growth of OUSD children.**

<b>How Dollars Were Spent Annually (\$139,024)</b>		
<b>2005-06 (A)</b>	\$0	<ul style="list-style-type: none"> <li>Hired ComPAS Project Manager to begin research on best practices</li> </ul>
<b>2006-07 (A)</b>	\$62,532	<ul style="list-style-type: none"> <li>Completed ComPAS strategic plan</li> <li>Established Family and Community Office</li> <li>Incorporated ComPAS into school-site planning process</li> <li>Implemented student leadership – meaningful student engagement</li> </ul>
<b>2007-08 (E)</b>	\$76,491	<ul style="list-style-type: none"> <li>Opened Parent Resource Centers at 5 sites</li> <li>Implementing Youth Data Archive Project – data sharing through JPA</li> <li>Developed and improved volunteer policy and procedures</li> <li>Implemented pilot mentoring program</li> </ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"> <li>'07-08 was one time funding</li> <li>To continue the work of ComPAS we have reallocated funding within the Family and Community Office. In addition, we will seek new funding to accelerate the work of the Family and Community Office</li> </ul>



## Network Model

**Vision: To build a Network Model that accelerates school performance and improves instructional capacity of site principals.**

<b>How Dollars Were Spent Annually (\$314,217)</b>		
<b>2005-06 (A)</b>	\$15,457	<ul style="list-style-type: none"><li>• Revised network instructional leadership plan</li><li>• Provided increased coaching support to Network Executive Officers</li></ul>
<b>2006-07 (A)</b>	\$80,508	<ul style="list-style-type: none"><li>• Aligned cycles of inquiry to budgets</li><li>• Provided coaching/PD support to Network Executive Officers</li></ul>
<b>2007-08 (E)</b>	\$168,331	<ul style="list-style-type: none"><li>• Partnered with Cambridge Associates to develop assessment rubric for school walkthroughs</li><li>• Collected best practices from other districts</li><li>• Provided coaching/PD support to Network Executive Officers</li></ul>
<b>2008-09 (B)</b>	\$50,000	<ul style="list-style-type: none"><li>• We are going to partner with BayCES to provide coaching support to our Network Executive Officers</li></ul>



## Incubator Services

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**Vision: To create powerful new schools of choice for families in every neighborhood by: (a) Engaging community-based design teams (administrators, parents, teachers, etc.) through a year-long structured process called the “Incubator” to design and open new schools and (b) supporting design teams to make solid decisions around their new school programs, including exposure to best practice and research.**

<b>How Dollars Were Spent Annually (\$888,270)</b>		
<b>2005-06 (A)</b>	\$326,747	<ul style="list-style-type: none"> <li>Supported 6 new school design teams through year long incubation</li> </ul>
<b>2006-07 (A)</b>	\$274,584	<ul style="list-style-type: none"> <li>Supported 12 new school design teams through year long incubation</li> </ul>
<b>2007-08 (E)</b>	\$286,939	<ul style="list-style-type: none"> <li>Supported 3 new school design teams through year long incubation</li> <li>Provided school improvement coaching</li> </ul>
<b>2008-09 (B)</b>	TIIG	<ul style="list-style-type: none"> <li>Melrose Leadership Academy is the only school currently planned to go through an incubation process and we are using categorical funds (TIIG) to support the process.</li> </ul>





## New School Network/ELO Membership

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**Vision: Continue the work of the New School Incubator by supporting the leaders and the school leadership teams in implementing their new school designs, supporting new school principals in developing strong systems and structures to ensure accountability, stability, and ultimately sustainability, and then finally transition new schools to final networks with strategic multi-year implementation plans**

<b>How Dollars Were Spent Annually (\$2,439,764)</b>		
<b>2005-06 (A)</b>	\$1,024,646	<ul style="list-style-type: none"><li>• Supported seven 1<sup>st</sup> year schools</li></ul>
<b>2006-07 (A)</b>	\$983,027	<ul style="list-style-type: none"><li>• Supported twelve 1<sup>st</sup> year schools</li><li>• New school network closed and new schools integrated into other networks</li></ul>
<b>2007-08 (E)</b>	\$432,091	<ul style="list-style-type: none"><li>• Supported seven 1<sup>st</sup> year and four 2<sup>nd</sup> year schools</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• We are not opening any new schools in '08-09</li></ul>



## School Portfolio Management

**Vision: Every family will have access to two quality schools in their neighborhood and the ability to select from a diverse range of educational options throughout Oakland.**

<b>How Dollars Were Spent Annually (\$1,721,542)</b>		
<b>2005-06 (A)</b>	\$393,320	<ul style="list-style-type: none"> <li>• Provided support to three schools that were closing.</li> </ul>
<b>2006-07 (A)</b>	\$810,511	<ul style="list-style-type: none"> <li>• Provide support to three schools that were closing.</li> <li>• Designed School Portfolio Management tiering structure</li> </ul>
<b>2007-08 (E)</b>	\$517,711	<ul style="list-style-type: none"> <li>• Provided support to five transitioning schools</li> <li>• Implemented new charter school evaluation process</li> <li>• Implemented and improved site planning process</li> </ul>
<b>2008-09 (B)</b>	TIIG	<ul style="list-style-type: none"> <li>• Funding is now integrated within the District using TIIG</li> </ul>



## School Options

**Vision: to ensure every family in Oakland has access to at least two quality schools in their neighborhood.**

<b>How Dollars Were Spent Annually (\$216,544)</b>		
<b>2005-06 (A)</b>	\$13,760	<ul style="list-style-type: none"> <li>• Researched best practices for student enrollment</li> </ul>
<b>2006-07 (A)</b>	\$176,234	<ul style="list-style-type: none"> <li>• Designed centralized student enrollment process (options process)</li> <li>• Developed and hosted Options Fair</li> </ul>
<b>2007-08 (E)</b>	\$26,550	<ul style="list-style-type: none"> <li>• Hosted Options Fair</li> <li>• Fully integrated centralized Student Assignment Office</li> </ul>
<b>2008-09 (B)</b>	Categorical/ GP	<ul style="list-style-type: none"> <li>• Restructured Student Assignment Office and Bilingual Student Assessment Center into Student Assignment and Bilingual Testing Office housed in the Family and Community Office</li> </ul>
<b>2005-06 (A)</b>	Categorical/ GP	<ul style="list-style-type: none"> <li>• Continue to enhance Student Assignment and Bilingual Testing Office using existing categorical/GP funds</li> </ul>



## Principals-in-Training

**Vision: Principals-in-Training will result in a cadre of highly skilled leaders with exceptional instructional and technical abilities. These individuals will participate in a rigorous program of training as site administrators, with the capacity to take on site leadership upon the completion of their training year.**

<b>How Dollars Were Spent Annually (\$3,056,628)</b>		
<b>2005-06 (A)</b>	\$1,012,667	<ul style="list-style-type: none"> <li>Supported 13 principals in training for a year of residency</li> </ul>
<b>2006-07 (A)</b>	\$1,105,524	<ul style="list-style-type: none"> <li>Supported 11 principals in training for a year of residency</li> </ul>
<b>2007-08 (E)</b>	\$815,122	<ul style="list-style-type: none"> <li>Supported 11 principals in training for a year of residency</li> </ul>
<b>2008-09 (B)</b>	\$123,315 & Title II/Federal Leadership Grant	<ul style="list-style-type: none"> <li>We are using Title II and our Federal Leadership grant to cover 3 principals in training</li> <li>We applied for a Federal Leadership Grant of \$3.5M</li> </ul>



## Principal Leadership Development

**Vision: Develop Instructional Leaders with the will, skill, capacity and knowledge to effectively transform the schools with which they work and lead them to the reach OUSD's strategic goals. These leaders will be recruited from within and without Oakland, and selected through a rigorous process that includes multiple stakeholders throughout. These leaders will be retained through ongoing professional and personal support throughout the arc of their careers.**

<b>How Dollars Were Spent Annually (\$448,231)</b>		
<b>2006-07 (A)</b>	\$104,392	<ul style="list-style-type: none"> <li>• Redesigned administrative hiring process</li> <li>• Implemented revised leadership retreats</li> </ul>
<b>2007-08 (A)</b>	\$ 227,153	<ul style="list-style-type: none"> <li>• Provided instructional and operational coaches to 1<sup>st</sup> year principals</li> </ul>
<b>2008-09 (E)</b>	\$116,685	<ul style="list-style-type: none"> <li>• Will provide 1<sup>st</sup> year principals with Operations Support Coaching</li> <li>• Reallocating categorical funds to provide training for our principals</li> <li>• Applying for Federal Leadership Grant for \$3.5M</li> <li>• Looking for new private funding</li> </ul>



## Teacher Coaching

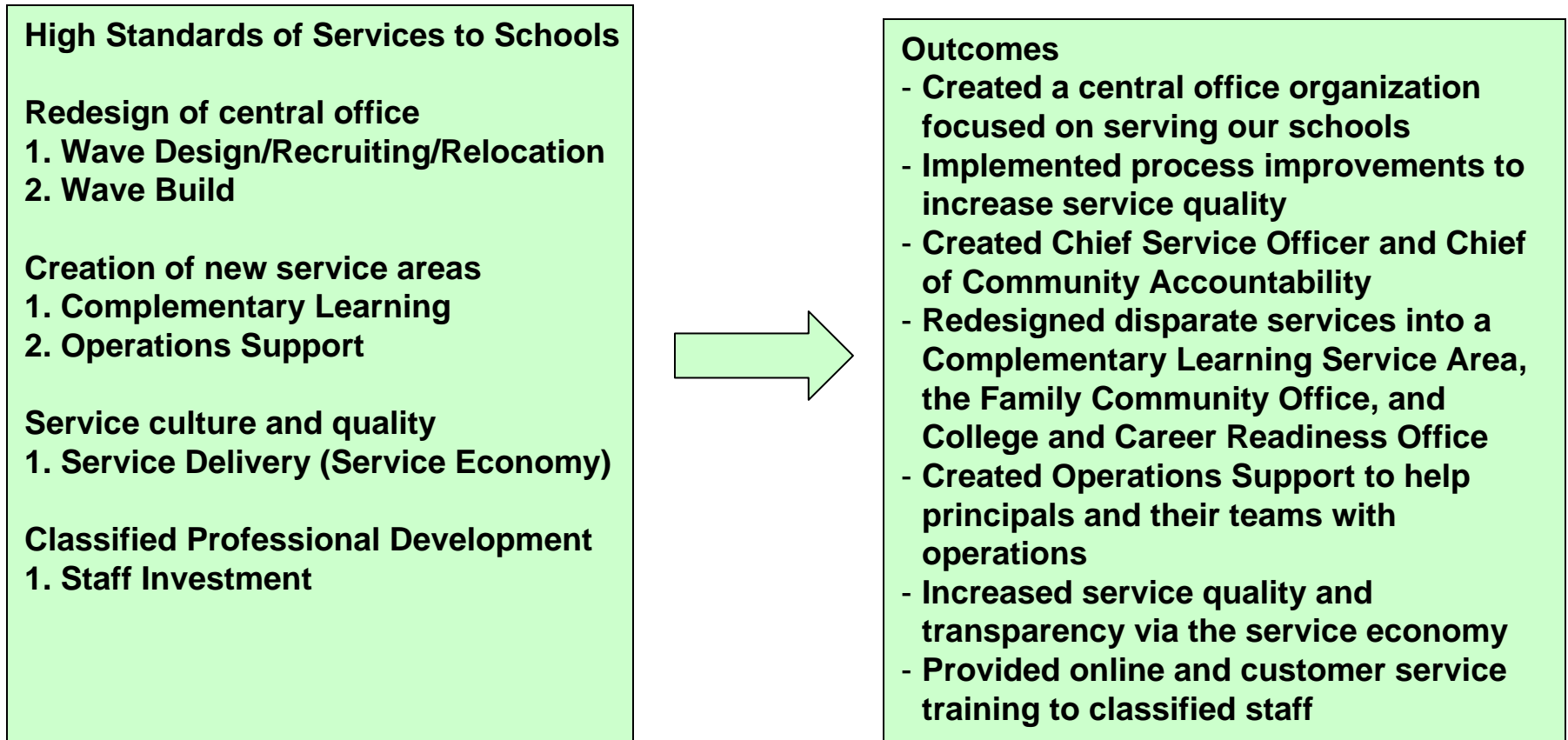
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**Vision:** To deliver high-quality coaching services to our teachers and principals in the area of school improvement services

How Dollars Were Spent Annually		
<b>2005-06 (A)</b>	\$90,000	<ul style="list-style-type: none"><li>• Subsidized teacher coaching</li></ul>
<b>2006-07 (A)</b>	\$283,017	<ul style="list-style-type: none"><li>• Subsidized teacher coaching</li></ul>
<b>2007-08 (E)</b>	\$58,148	<ul style="list-style-type: none"><li>• Subsidized teacher coaching</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• 100% purchased by schools</li></ul>



## Projects supporting high standards of service to our schools



'04-05 Actual	'05-06 Actual	'06-07 Actual	07-08 Estimate	08-09 Budget	Total Budget
\$ 84,400	\$ 1,598,375	\$ 2,396,988	\$ 2,597,790	\$ 230,000	\$ 6,907,553

\*Funding includes private funding (\$6,647,581) and OUSD match (\$626,000)



## Wave Design/Redesign Recruiting/Relocation

**Vision: Map the current state of our Service Organization and collect best practices to design a highly functioning Service Organization that meets the needs of our students.**

<b>How Dollars Were Spent Annually (\$928,108)</b>		
<b>2004-05 (A)</b>	\$52,000	<ul style="list-style-type: none"> <li>Researched best practices and began to design Service Organization</li> </ul>
<b>2005-06 (A)</b>	\$266,904	<ul style="list-style-type: none"> <li>Redesigned HR, Financial Services, Instructional Services and Research and Assessment</li> </ul>
<b>2006-07 (A)</b>	\$609,204	<ul style="list-style-type: none"> <li>Designed Family Community Office, Complementary Services, State and Federal Compliance, College and Career Readiness, and School Portfolio Management</li> </ul>
<b>2007-08 (E)</b>	\$0	<ul style="list-style-type: none"> <li>Was a one time expense</li> </ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"> <li>Was a one time expense</li> </ul>





## Wave Build

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**Vision: Utilize scorecard data, *Use Your Voice*, FCMAT standards, and the design documents from Wave Design to identify areas where we can continuously improve to meet the needs of our schools.**

<b>How Dollars Were Spent Annually (\$1,898,259)</b>		
<b>2004-05 (A)</b>	\$6,000	<ul style="list-style-type: none"><li>• Hired project manager to oversee work.</li></ul>
<b>2005-06 (A)</b>	\$353,179	<ul style="list-style-type: none"><li>• Implemented process improvements for HR and Financial Services</li></ul>
<b>2006-07 (A)</b>	\$239,158	<ul style="list-style-type: none"><li>• Implemented process improvements for HR</li></ul>
<b>2007-08 (E)</b>	\$1,299,922	<ul style="list-style-type: none"><li>• Implemented process improvements for nutrition services, payroll, HR, custodial services, and procurement.</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• 2007-08 was one time funding</li></ul>



## Complementary Learning

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**Vision: Strengthen the relationship between schools and institutions that offer academic and enrichment support for students. The goal of the model is to accelerate student achievement and promote student wellness through integrated provision of site-based programming, site-based programming and site-based accessibility to community supports.**

<b>How Dollars Were Spent Annually (\$558,078)</b>		
<b>2006-07 (A)</b>	\$58,078	<ul style="list-style-type: none"><li>• Developed strategic plan for complementary learning service area</li></ul>
<b>2007-08 (E)</b>	\$500,000	<ul style="list-style-type: none"><li>• Partnered with Safe Passages to develop strategic plan to provide integrated services at schools</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• Integrating work into Complementary Services Area using existing categorical funds</li><li>• Received private funding from Atlantic Philanthropies and looking for additional grant funding.</li></ul>



## Operations Support

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**Vision: To increase student achievement, Principals need the time and the capacity to focus on instructional leadership. Operations Support helps Principals (1) navigate district resources and process; (2) create efficient operational systems; and (3) increase Principal & staff capacity.**

<b>How Dollars Were Spent Annually (\$2,249,096)</b>		
<b>2004-05 (A)</b>	\$26,400	<ul style="list-style-type: none"><li>• Designed Operations Support model</li></ul>
<b>2005-06 (A)</b>	\$887,788	<ul style="list-style-type: none"><li>• Piloted model for free at 106 schools</li></ul>
<b>2006-07 (A)</b>	\$1,052,274	<ul style="list-style-type: none"><li>• Provided subsidized services for 64 schools</li></ul>
<b>2007-08 (E)</b>	\$281,635	<ul style="list-style-type: none"><li>• Provided subsidized services for 30 schools (40 paid 100%)</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• Services will be purchased 100% by schools</li></ul>



## Service Delivery (Service Economy)

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**Vision: A strategic investment approach that places schools at the center of all financial decisions, provides all stakeholders with accurate and timely data about spending priorities and effectiveness, and ensures that school share the ability to choose the services that best meet the needs of their students**

<b>How Dollars Were Spent Annually (\$84,573)</b>		
<b>2005-06 (A)</b>	\$5,200	<ul style="list-style-type: none"><li>• Collected research on service delivery models</li></ul>
<b>2006-07 (A)</b>	\$79,373	<ul style="list-style-type: none"><li>• Designed service economy model</li></ul>
<b>2007-08 (E)</b>	\$0	<ul style="list-style-type: none"><li>• Design is integrated into the District</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• Design is integrated into the District</li></ul>



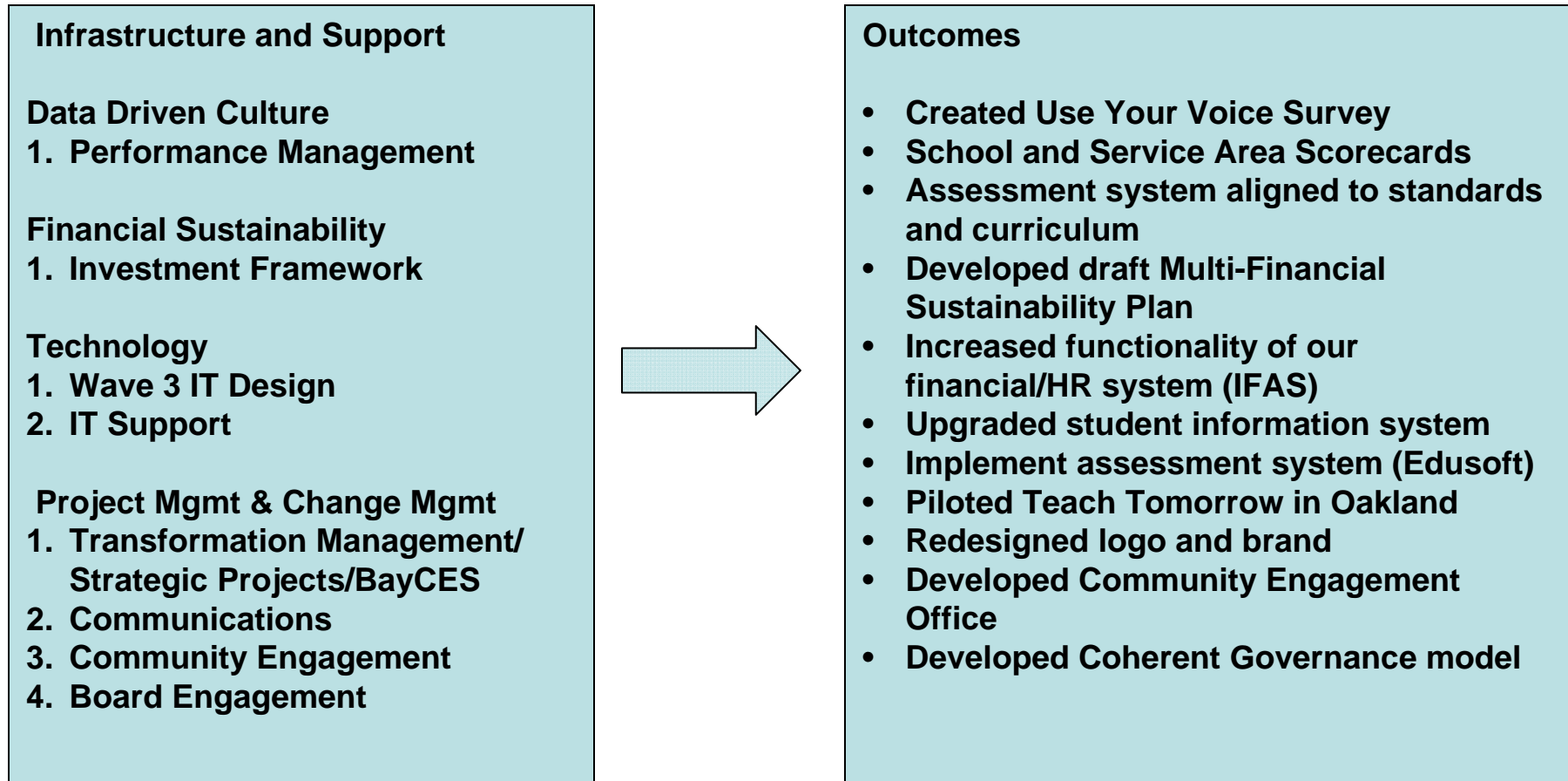
## Staff Investment

**Vision: Excellent adult performance is vital to increasing student achievement. All OUSD staff, with particular focus on classified staff, will have access to high-quality professional development opportunities and a range of resources to support increased job performance**

<b>How Dollars Were Spent Annually (\$1,093,966)</b>		
<b>2005-06 (A)</b>	\$15,000	<ul style="list-style-type: none"> <li>• Researched best practices and designed non instructional professional development program to meet FCMAT standard</li> </ul>
<b>2006-07 (A)</b>	\$336,986	<ul style="list-style-type: none"> <li>• Developed online training system</li> <li>• Launched Achieving Service Excellence training</li> <li>• Held Classified Staff Retreats</li> </ul>
<b>2007-08 (E)</b>	\$511,980	<ul style="list-style-type: none"> <li>• Developed 83 online courses</li> <li>• Approaching 1,000 employees trained in Achieving Service Excellence</li> <li>• Held Classified Staff Retreats</li> <li>• Launched Attendance proficiency certification pathway</li> </ul>
<b>2008-09 (B)</b>	\$230,000	<ul style="list-style-type: none"> <li>• Will leverage carryover to continue Achieving Service Excellence training and online training development</li> <li>• Looking for additional private funding</li> </ul>



## Infrastructure and support projects



'04-05 Actual	'05-06 Actual	'06-07 Actual	07-08 Estimate	08-09 Budget	Total Budget
\$ 2,881,175	\$ 5,922,139	\$ 6,000,260	\$ 3,397,060	\$ 6,756,182	\$ 24,956,816

\*Funding includes private funding (\$11,283,316) and OUSD match (\$13,673,500)



# Performance Management

**Vision: Individuals and teams across the district possess a clear vision with focus on academic results, can articulate a limited number of goals aimed at critical outcomes, have access to key performance metrics to assess performance, and frequently reflect on progress, practice, and outcomes.**

How Dollars Were Spent Annually (\$5,646,934)		
<b>2004-05 (A)</b>	\$711,118	<ul style="list-style-type: none"> <li>• Develop Results Based Inquiry (RBI) Plan (tools and trainings)</li> </ul>
<b>2005-06 (A)</b>	\$1,846,380	<ul style="list-style-type: none"> <li>• Results Based Inquiry (RBI) fully integrated into district systems</li> <li>• Launched <i>Use Your Voice</i> Survey</li> <li>• Implement School and Service Area Scorecards and</li> <li>• Launched Achieving Service Excellence Training</li> <li>• Began work on Data Warehouse</li> </ul>
<b>2006-07 (A)</b>	\$1,709,294	<ul style="list-style-type: none"> <li>• Beginning and Mid Year Inquiry Cycles (CST, year-end reports in beginning)</li> <li>• Publish School and Service Area Scorecards</li> <li>• School and Service Area Improvement Plan</li> <li>• Continued working on Data Warehouse</li> </ul>
<b>2007-08 (E)</b>	\$297,027	<ul style="list-style-type: none"> <li>• Analyzed and improved assessments</li> <li>• Assessed and improved the RBI and Scorecard processes</li> </ul>
<b>2008-09 (B)</b>	\$817,586*	<ul style="list-style-type: none"> <li>• Will continue the work in 2008-09 via new grant funding from the Michael and Susan Dell Foundation</li> </ul>

\* Total amount in '08-09 is \$2.2M – amount reflected is only the amount to meet the requirements of the \$43.3 M budget



# Investment Framework

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**Vision: Implement a multi-year financial plan that ensures we are effectively using our limited resources to maximize student achievement. There are three primary levers that can be used to accomplish this which include: (1) revenue maximization, (2) revenue allocation, and (3) expense management.**

<b>How Dollars Were Spent Annually (\$288,863)</b>		
<b>2006-07(A)</b>	\$62,261	<ul style="list-style-type: none"><li>• Collected research and began work on Investment Framework</li><li>• Support central office budgeting process</li></ul>
<b>2007-08 (E)</b>	\$226,602	<ul style="list-style-type: none"><li>• Worked on multi-year financial sustainability plan</li><li>• Integrated RBB with School Site Plans</li><li>• Partnered with Education Resource Strategies to identify areas to strategically align our budget</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• '07-08 was a one time expense</li></ul>





## Wave 3 Information Technology Design

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**Vision:** To ensure that the portfolio of technology projects needed to support *Expect Success* is managed effectively: clear technology vision, right list of projects with clear scoping and deliverables, right set of priorities, processes in place to manage new project creation, project management, change management, and move to production, and projects delivered to agreed upon schedules.

How Dollars Were Spent Annually (\$165,416)		
<b>2006-07 (A)</b>	\$98,801	<ul style="list-style-type: none"><li>• Researched best practices for IT design</li><li>• Developed Program Management Office to manage IT projects</li></ul>
<b>2007-08 (E)</b>	\$66,615	<ul style="list-style-type: none"><li>• Developed IT strategic plan</li><li>• Managed IT projects</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• '07-08 was one time funding</li></ul>



## Information Technology Support

**Vision: To implement technology projects required for all *Expect Success* initiatives.**

<b>How Dollars Were Spent Annually (\$13,936,868)</b>		
<b>2004-05 (A)</b>	\$2,024,497	<ul style="list-style-type: none"> <li>• Began transition of student information system to AERIES</li> <li>• Began implementation of Edusoft</li> </ul>
<b>2005-06 (A)</b>	\$2,905,595	<ul style="list-style-type: none"> <li>• Continued transition of student information system to AERIES</li> <li>• Continued implementation of Edusoft</li> </ul>
<b>2006-07 (A)</b>	\$2,714,536	<ul style="list-style-type: none"> <li>• Finished transition of student information system to AERIES</li> <li>• Finished implementation of Edusoft</li> <li>• Implemented new District website</li> <li>• Upgraded substitute system</li> </ul>
<b>2007-08 (E)</b>	\$1,224,167	<ul style="list-style-type: none"> <li>• Worked on IT upgrades (Data integrity project, HR summer spike, automated personnel report, work order system, online hiring process)</li> </ul>
<b>2008-09 (B)</b>	\$1,991,000	<ul style="list-style-type: none"> <li>• IT upgrades and intranet/internet redesign</li> </ul>
<b>2009-10 (B)</b>	\$3,077,073	<ul style="list-style-type: none"> <li>• IT upgrades</li> </ul>



## Transformation Management/Strategic Projects/BayCES

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**Vision: To effectively provide support to ensure the successful implementation of *Expect Success* initiatives**

<b>How Dollars Were Spent Annually (\$2,588,373)</b>		
<b>2004-05 (A)</b>	\$145,560	<ul style="list-style-type: none"> <li>• Established Expect Success project management office at BayCES</li> </ul>
<b>2005-06 (A)</b>	\$989,862	<ul style="list-style-type: none"> <li>• Continued Expect Success Program Management</li> </ul>
<b>2006-07 (A)</b>	\$867,754	<ul style="list-style-type: none"> <li>• Transitioned Program Management Office to OUSD</li> </ul>
<b>2007-08 (E)</b>	\$1,045,273	<ul style="list-style-type: none"> <li>• Continued program management</li> <li>• Started Small Schools Phase II evaluation</li> <li>• Launched Teach Tomorrow for Oakland</li> <li>• Researched External Affairs Issues</li> </ul>
<b>2008-09 (B)</b>	\$895,640	<ul style="list-style-type: none"> <li>• Carryover will support the Strategic Projects office, Teach Tomorrow in Oakland, FCMAT/Coherent Governance project management, and Investing in Our People</li> </ul>



# Communications

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**Vision:**

- Promote student learning, and college and workplace readiness
- Increase organizational clarity (vision, values, priorities and roles)
- Improve perceptions of Oakland Public Schools among stakeholders
- Build OUSD’s capacity to communicate (listen, hear, share, respond) well over time

<b>How Dollars Were Spent Annually (\$452,010)</b>		
<b>2006-07 (A)</b>	\$141,456	<ul style="list-style-type: none"><li>• Developed core vision document</li><li>• Invested in communication collateral</li></ul>
<b>2007-08 (E)</b>	\$310,554	<ul style="list-style-type: none"><li>• Launched Expect Success campaign</li><li>• Published annual report</li><li>• Developed new brand and collateral</li></ul>
<b>2008-09 (B)</b>	\$0	<ul style="list-style-type: none"><li>• Scaled back communication efforts and work has been integrated into the district</li></ul>



## Community Engagement

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**Vision: To support our community stakeholders to better understand the changes that are occurring within the district as a result of Expect Success**

<b>How Dollars Were Spent Annually (\$304,932)</b>		
<b>2005-06 (A)</b>	\$81,967	<ul style="list-style-type: none"><li>Expanded relationship and partnerships with Community Based Organizations</li></ul>
<b>2006-07 (A)</b>	\$197,698	<ul style="list-style-type: none"><li>Held School Site Council Summit</li><li>Developed community engagement strategy</li><li>Continued to expand partnerships and relationships with Community Based Organizations</li></ul>
<b>2007-08 (E)</b>	TIIG	<ul style="list-style-type: none"><li>Integrated work into Family Community Office</li></ul>
<b>2008-09 (B)</b>	TIIG	<ul style="list-style-type: none"><li>Work is integrated into the Family Community Office and its budget</li></ul>



## Board Engagement

**Vision: To support the Oakland Board of Education in being a united and coherent governing body prepared to assume local governing authority in the future.**

<b>How Dollars Were Spent Annually (\$71,000)</b>		
<b>2006-07 (A)</b>	\$16,000	<ul style="list-style-type: none"> <li>We initiated work with the Aspen Group to develop a coherent governance model</li> </ul>
<b>2007-08 (E)</b>	\$0	<ul style="list-style-type: none"> <li>An outside organization received funding to have the Aspen Group continue to support us in our development of a coherent governance model</li> </ul>
<b>2008-09 (B)</b>	\$40,000 (Private)	<ul style="list-style-type: none"> <li>The Aspen Group will be assisting our implementation of our coherent governance model until December</li> <li>We will ensure all of our on-going reforms will be driven by and in alignment with Coherent Governance Policy.</li> </ul>

Note: \$15,000 of OUSD GP money will be used in '08-09, but is not part of Expect Success \$43.3M budget



## The Broad Foundation Investment

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<b>Program &amp; Number</b>	<b>Grant Budget</b>
9401 - Operations Support	\$ 1,141,070
9419 - Wave build (1-3)	\$ 980,490
9420 - Transformation Mgmt	\$ 859,083
9426 - Principals-in-training salaries	\$ 733,950
9408 - Staff investment	\$ 520,000
9413 - Expect Success! IT support	\$ 445,331
9418 - Wave 2/3 redesign	\$ 296,178
9410 - MAAP	\$ 250,000
9425 - Investment framework	\$ 226,602
9414 - Wave 3 IT design	\$ 165,416
9409 - Network model	\$ 145,000
9403 - Strategic Projects	\$ 73,430
9427 - Communications	\$ 73,266
9406 - Teacher coaching services	\$ 37,728
9416 - Redesign recruiting	\$ 36,458
9411 - Service Delivery	\$ 16,000
<b>Grand Total</b>	<b>\$ 6,000,000</b>



## The Bill and Melinda Gates Foundation Investment

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<b>Program &amp; Number</b>	<b>Grant Allocation</b>
9424 - ELO Membership	\$ 1,600,500
9415 - Portfolio Mgmt	\$ 1,356,463
9410 - MAAP	\$ 1,269,148
9429 - BayCES	\$ 1,193,440
9420 - Transformation Mgmt	\$ 794,670
9404 - Incubator Services	\$ 707,000
9401 - Operations Support	\$ 565,026
9408 - Staff investment	\$ 500,000
9419 - Wave build (1-3)	\$ 413,750
9418 - Wave 2/3 redesign	\$ 296,177
9405 - Principal Leadership	\$ 263,000
9407 - School Options	\$ 216,544
9402 - Community Engagement	\$ 188,000
9413 - Expect Success! IT support	\$ 186,000
9409 - Network model	\$ 145,000
9406 - Teacher coaching services	\$ 110,436
9403 - Strategic Projects	\$ 88,846
<b>Grand Total</b>	<b>\$ 9,893,640</b>





## Michael and Susan Dell Foundation

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\$ 6,152,552.00 has been granted for our Performance Management initiative\*

\*Only \$5,646,934 counted toward the \$43.3M budget for Expect Success



## Local Foundations

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<b>Program &amp; Number</b>	<b>Total Budget</b>
9426 - Principals-in-training salaries	\$ 2,322,678
9420 - Transformation Mgmt	\$ 934,621
9428 - Comp Learning	\$ 558,078
9413 - Expect Success! IT support	\$ 523,037
9419 - Wave build (1-3)	\$ 498,019
9424 - ELO Membership	\$ 355,764
9415 - Portfolio Mgmt	\$ 338,768
9418 - Wave 2/3 Design	\$ 283,753
9427 - Communications	\$ 278,902
9422 - ComPAS	\$ 139,024
9402 - Community Engagement	\$ 116,932
9405 - Principal Leadership	\$ 116,685
9411 - Service Delivery	\$ 68,573
9425 - Investment Framework	\$ 62,261
9408 - Staff Investment	\$ 58,966
9421 - Board Development	\$ 56,000
9416 - Redesign recruiting	\$ 45,761
9409 - Network Model	\$ 13,644
<b>Grand Total</b>	<b>\$ 6,771,465</b>



## OUSD Match

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<b>Program &amp; Number</b>	<b>Budget</b>	<b>Resource</b>
9413 - Expect Success! IT support	\$ 12,782,500	State Loan & GP
9412- Performance Mgmt	\$ 668,500	TIIG
9401 - Operations Support	\$ 543,000	TIIG
9424 - ELO Membership	\$ 483,500	Title II, TIIG
9406 - Teacher coaching services	\$ 283,000	Title I, Title II
9423 - SO Performance Mgmt	\$ 222,500	TIIG
9410 - MAAP	\$ 215,000	Title I, Title II
9404 - Incubator Services	\$ 125,000	Title I, Title II
9418 - Wave 2/3 redesign	\$ 52,000	GP
9408 - Staff investment	\$ 15,000	GP
9417 - Relocation	\$ 10,000	GP
9419 - Wave build (1-3)	\$ 6,000	GP
<b>Grand Total</b>	<b>\$ 15,406,000</b>	



# Expect Success Funded Employees and Consultants in '08-09

## Employees

### Performance Management

- Jana Carter, Employee Relations Specialist
- Jean Wing (.5), Coordinator Research and Assessment
- Amanda Von Moos, Operations Support Coach – Process Improvement
- Tracey Logan, Operations Support Coach – Process Improvement
- Marrecio Coleman, Project Manager Performance Management
- Vacant, Project Manager Performance Management

### Investing in Our People

- Jill Schiager, Manager of Operations Support and Non-Instructional PD
- Delano Garner, Achieving Service Excellence (RATER)
- Rachelle Rogers-Ard, Project Manager Teach Tomorrow for Oakland
- Wayne Garvin, New Teacher Support of Solutions
- Vacant - Project Manager, Investing in our People
- Marcus Silvi, Operations Support – Principal Deliverables Tool

### Strategic Projects

- Matt Hill, Executive Officer Strategic Projects
- Madeleine Clarke, Development Director
- Katie Davis, Assistant Program Manager
- Nai Schao, Account Receivables Billing Technician
- Joel Ross, Project Manager – FCMAT/Coherent Governance

## Consultants

### Performance Management

- Cambridge Associates, Consultants - School Walkthrough Rubrics
- Stanford SRN, Consultants – Small Schools Evaluation
- Saundra Anderson, Consultant Process Improvement
- Sonya Lopez, Consultant Data Collection Tools

### Investing in Our People

- BayCES , Consultant Network Executive Officer coaching
- Lisa Ogelsby, Consultant – *On Track*
- Bill Cassel, Consultant – *On Track*

### MAAP

- John Hall, Consultant – Project Manager MAAP

