OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

OPERATIONS & FINANCE READINESS TASK FORCE

Staff Lead: Artise Hardy

Director of Budgeting

Alignment with District Vision

OUSD MISSION/VISION

All students will graduate. As a result, they are caring, competent, and critical thinkers, fully-informed, engaged, and contributing citizens, and prepared to succeed in college and career.

OUSD GOAL

To create a FULL SERVICE COMMUNITY DISTRICT that serves the whole child, eliminates inequity, and provides each child with an excellent teacher every day.

TASK FORCE GOAL

To eliminate structural deficit from OUSD and prepare business, operations, and finance to support a Full Service Community District.

Operational & Finance Readiness Task Force (Lead: Artise Hardy)

TASK FORCE GOALS

- **To audit and analyze the central office's key business functions and eliminate inefficiency, inaccuracy, and waste.**
- **To reform the district's operations and finance systems, policies, and procedures for maximum efficiency and effectiveness.**
- **To reduce challenges with payroll, human resources, contracting, and leave management.**
- **To prepare the central business operations groups to support full service community schools.**
- **To eliminate the structural deficit (e.g. on-going expenditures = revenues.)**

TASK FORCE DELIVERABLES

- **Present recommendations for refinement, reform, and retooling to the Superintendent by February 2011: Payroll, Human Resources, Contracts, and Leave Management.**
- **Implement major reforms in these key business functions from April to June 2011.**
- **Present recommendations to eliminate the structural deficit.**

Task Force Membership

NAME	TITLE	ORGANIZATION	TASK FORCE ROLE
Vernon Hal	Deputy Superintendent, Business and Operations	OUSD	
Jackie Minor	General Counsel	OUSD	
Artise Hardy	Director of Budgeting	OUSD	
Roberta Saddler	Controller, Accounting Officer	OUSD	
Joel Ross	Manager - Contracting	OUSD	
Reginald Crowell	Risk Management (Benefits)	OUSD	
Gabriel Valenzula	Omsbudsman	OUSD	
Principals/ Representative- 2	TBD	OUSD	
Gail Isserman	Human Resources	OUSD	
Barbara Gee	Human Resources	OUSD	
Laura Goin	Executive Assistant	OUSD	
Sele Nadel-Hayes	Operations Support Manager	OUSD	
Tara Guard	Human Resources	OUSD	
Gee Kin or Representative	Executive Director - Technology Services	OUSD	
SEIU	President or Representative	SEIU	
UAOS	Joanna Lugen or Representative	UAOS	
Vendor (School Sites)	TBD		
Jane Nicholson	Complimentary Learning	OUSD	
OUSD Consultant	TBD		
Amanda Van Moss	Consultant - Project Mgr, Tech. Svcs	OUSD	
School Clerks/Office Mgrs - 2	TBD	OUSD	

Operating Norms & Work Structure

OPERATING NORMS

- Review and acknowledge prior studies & recommendations; address current/future OUSD needs.
- Focus on quickly documenting top activities of each department and evaluating/rating their value-added, efficiency, accuracy, tools, and effectiveness.
- Best Practices will be researched and presented to Taskforce for discussion and application to OUSD challenges.

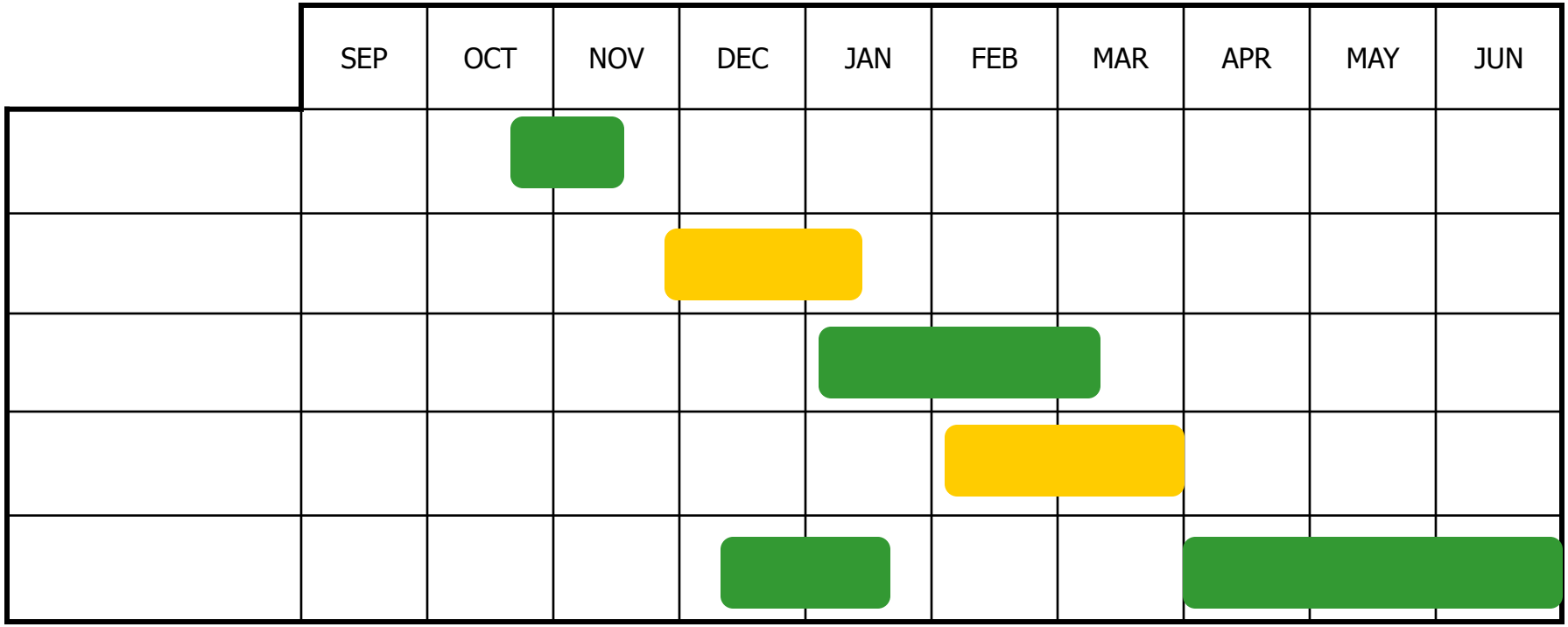
WORK STRUCTURE

- Convene taskforce weekly, (day/time to be determined), with subgroup reports.
- Establish Subgroups (1 for each business function) that will convene weekly.
- Other processes and work structures to be determined.

Key Dates & Project Plan Overview

KEY DATES

- Oct. 29th: Task Force Kick-Off Meeting
- Nov 5th : Finalization: Scope and Definitions, Audit Structure
- Nov. 15 : Start Review of Central Business Functions
- Jan. 5th Complete Assessments, Assess Structural Deficit Components
- Feb. 9th: Present Final Report & Recommendations to the Board
- April 1st: Begin Organizational Implementations
- June 30th: Complete Implementations



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Interdependencies with Other Task Forces

- Systems Equity Reform

  Align proposals for eliminating the structural deficit in the central sites with the proposals from the cost savings and revenue reductions for the schools.

- Regional Neighborhood Zone Approach

  Align the expectations of the full community schools with the reforms in central district policies and procedures.

Guiding Effective Practices & Research

- OUSD: Multi-Year Fiscal Sustainability Plan, 2005, 2008-9
- Performance Management A framework for management control systems research: David Otley http://miha.ef.uni-lj.si/_dokumenti3plus2/196128/Otley-1999-PM-aframeworkforMCSresearch.pdf
- The Big Shift: Setting Sights on Value http://www.cimaglobal.com/Documents/Thought_leadership_docs/CIMA%20Adecco%20Finance%20Partnering.pdf
- Workforce Analytics Show How Much People Matter: http://www.ventanaresearch.com/research/article.aspx?id=3994
- Others: To Be Determined