



**OAKLAND UNIFIED
SCHOOL DISTRICT**
Community Schools, Thriving Students

Initial Presentation & Discussion Regarding Alameda Grand Jury Report



Presented by Kyla Johnson-Trammell, Superintendent
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Presented to Board of Education

August 20, 2019

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Acknowledgement & Appreciation

- Grand Jury should be commended for its efforts and its candid feedback
- Grand Jury exemplified how panel of citizens can provide thoughtful insights and recommendations
- Opportunity to discuss challenges and make changes as necessary and appropriate
- No intent to specifically rebut or identify inaccuracies unless it would materially alter OUSD's response or willingness to implement recommendation

Presentation Overview

- Timeline & Background
- Discussion Format & Structure
- Discussion on Topic Areas

Timeline & Background

- OUSD received report on June 24, 2019
- OUSD has 90 days to respond
- Focus of today's special meeting
 - Opportunity to provide outline of possible response
 - Solicit Board comments and questions
- September 11, 2019 Board meeting
 - Final proposed response will be presented for consideration and action

Timeline & Background

- Key Report sections
 - An investigation section that includes certain facts and allegations relevant to the Report's findings and recommendations
 - 11 findings (listed as 19-5 through 19-15)
 - 10 recommendations (list as 19-5 through 19-14)

Timeline & Background

- Under state law, OUSD must respond to each finding with one of the following responses:
 - Agree
 - Disagree Wholly, with an explanation
 - Disagree Partially, with an explanation

Timeline & Background

- Under state law, OUSD must respond to each recommendation with one of the following responses:
 - Has been implemented, with a brief summary of the implementation actions
 - Will be implemented, with an implementation schedule
 - Requires further analysis, with an explanation and the scope and parameters of an analysis or study, and a completion date that is not more than 6 months after the issuance of this report
 - Will not be implemented because it is not warranted or is not reasonable, with an explanation

Discussion Format & Structure

- Findings and recommendations have been grouped based on topics
- For each topic area
 - Summary of findings and recommendations
 - Outline of possible response
 - Questions for Board discussion

Discussion Format & Structure

- Staff is seeking Board questions, comments, and responses to staff questions
- For specific questions from Board, staff will
 - Note all questions
 - Strive to provide responses to questions by September 11, 2019 Board meeting
 - Incorporate answers into the final proposed report as appropriate

Discussion Format & Structure

- **IMPORTANT NOTE:** State law imposes limitations on Board discussion and staff responses
 - Personnel matters/employee discipline
 - Active or potential litigation
 - Privileged communications

Topic Areas

- Topic Area 1: District Spending
- Topic Area 2: Facilities
- Topic Area 3: Board Policies
- Topic Area 4: Board Meetings & Leadership
- Topic Area 5: Culture & Capacity

Topic Area 1: District Spending

- Focus:
 - Extent to which OUSD spending is oriented towards needs of students, classrooms, and school sites
 - Distribution of OUSD expenses
 - Sufficiency and type of spending reductions
- Finding(s): 19-5 and 19-6
- Recommendation(s): 19-5, 19-6, and 19-7

Topic Area 1: District Spending

- OUSD's fiscal issues result from complex combination of factors
 - Need for increased employee compensation
 - Provide FAPE while managing rising special education costs
 - State funding model based on student attendance, which disparately impacts districts like OUSD
 - High turnover and low morale caused by regular eliminations and reductions to staff
 - Need for additional training
 - Inadequate financial resources to support 87 District-run school sites
 - Legacy issues from prior financial system and data management

Topic Area 1: District Spending

- Difficult to compare district revenue and expenditures
 - Under CA law, districts like OUSD receive additional state resources because they have additional needs
 - Specifically, state provides additional funding to address unique needs of English learners, students from low-income families, and foster youth
 - Important to compare both revenue and student need when comparing differences in expenditures between districts

Topic Area 1: District Spending

- OUSD's expenditure categories are defined by state, have very technical definitions, and titles that can be somewhat misleading
 - E.g., some contractors provide additional classroom support, supplemental educational opportunities, and specialized services at sites
- OUSD has pre-existing results-based budgeting policy based on long-standing belief in school-level autonomy
 - Sites are in best position to make decisions for their students

Topic Area 1: District Spending

- OUSD Actions
 - Strategic Plan
 - Guiding roadmap for OUSD independent of changes within leadership
 - Blueprint for Quality for Schools/Citywide Plan
 - Multi-phased plan designed to meet the changing facility, program, and educational needs of Oakland and strategically evaluate best way to leverage vacant, underutilized, and surplus properties
 - Plan for Fiscal Vitality
 - Multi-year plan designed to strategically realign OUSD spending priorities to focus on needs of students

Topic Area 1: District Spending

- OUSD Actions
 - Priority is to protect resources and dollars at school sites to extent possible
 - Central office staff was reduced by 587 FTEs over two school years
 - Reduced central office staff further by 125 FTE for 2019-20 (13.7M)
 - 10 largest contracts in 2017-18 were for direct students services, including \$10M+ to vendors providing services to students with special needs
 - OUSD is making progress “right-sizing” the number of school sites
 - Adopted new or updated existing fiscal policies
 - Financial Reports and Accountability
 - Budget
 - School Services of California led financial workshop for Board

Topic Area 1: District Spending

Questions for Board

- Does this information accurately capture OUSD's actions with respect to understanding District expenditures, expenditure reductions and distribution, and the student need-focused nature of expenditures?
- Are there other examples that can help illustrate OUSD's actions?
- Are there other actions OUSD can or will undertake in this area?
- Are there any additions or changes to the Board Work Plan that the Board would want to consider in this area?



Topic Area 2: Facilities

- Focus:
 - Need for facilities master plan (FMP)
 - Use of bond funds, particularly for interim administrative housing costs
 - Project bidding and cost containment
- Finding(s): 19-7, 19-8, 19-9, and 19-11
- Recommendation(s): 19-9, 19-10, and 19-14

Topic Area 2: Facilities

- OUSD thanks and appreciates voters for support
 - OUSD continually strives to ensure that taxpayer dollars are spent as promised and that value is maximized
- Facilities department manages over 100 buildings and 680 portables, totaling 5,841,891 square feet
- Significant construction projects are underway
 - Examples: Fremont High, Glenview, Laurel, Central Kitchen, Intensive Support School Initiative Projects

Topic Area 2: Facilities

- New leadership in facilities department
- Deputy Chief of Facilities reformed Board Facilities Committee
- Facilities Committee and Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee aligned projects to match funding

Topic Area 2: Facilities

- OUSD Actions
 - OUSD has engaged MK Think to prepare more robust Facilities Master Plan
 - Board has approved plan for permanent administrative building
 - Board Resolution 1819-0211: Authorizing the Superintendent of Schools to Move Forward With Planning for Permanent District Administrative Center at Former Cole Elementary School (Cole Project)
 - It is appropriate to use bond funds for interim administrative housing costs
 - OUSD is actively engaged in addressing concerns surrounding contracting practices and concerns regarding facilities management of construction contracts

Topic Area 2: Facilities

Questions for Board

- Does this information accurately capture OUSD's actions with respect to facilities?
- Are there other examples that can help illustrate OUSD's actions?
- Are there other actions OUSD can or will undertake in this area?
- Are there any additions or changes to the Board Work Plan that the Board would want to consider in this area?

Topic Area 3: Board Policies

- Focus:
 - Need for Board to update policies
 - Particular concern was expressed regarding the local business utilization policy
- Finding(s): 19-10 and 19-13
- Recommendation(s): 19-11

Topic Area 3: Board Policies

- OUSD currently has over 650 board policies, administrative regulations, exhibits, and board bylaws
 - Areas include: governance, community relations, conflict of interest, business operations, personnel, students, instruction, and facilities
- California School Boards Association regularly publishes new policies and updates on select policies
- Districts can also create and update policies on their own
- Local business utilization (“LBU”) policy
 - Memorialized in Board Policy 3311 and 7115
 - Intent of LBU policy was to increase opportunities for local small businesses

Topic Area 3: Board Policies

- OUSD Actions
 - Board policies are regularly reviewed and updated if necessary
 - At least 50 board policies, administrative regulations, exhibits, and board bylaws have been updated within last year, including
 - Local Control and Accountability Plan (BP 460)
 - Budget (BP 3100)
 - Sale, Lease, Rental of District-Owned Real Property (AR 3280)
 - Management of District Assets (BP 3400)
 - Open Enrollment (BP 5116.1)

Topic Area 3: Board Policies

Questions for Board

- Does the Board want to reevaluate or review any of the specific policies referenced in the report?
- Are there any additions or changes to the Board Work Plan that the Board would want to consider in this area?

Topic Area 4: Board Meetings & Leadership

- Focus:
 - Structure, length, and focus of board meetings
 - Board training and focus
- Finding(s): 19-14 and 19-15
- Recommendation(s): 19-12 and 19-13

Topic Area 4: Board Meetings & Leadership

- Brown Act and board policies
 - Require transparency and opportunity for public input
 - Prohibit board majority from discussing positions on most issues outside of public meeting
- Board seeks community input on the serious decisions OUSD needs to make
- Board meeting structure can make it difficult to timely discuss important items

Topic Area 4: Board Meetings & Leadership

- OUSD Actions
 - Beacon Results provided three full-day trainings for Board, Superintendent, and senior staff
 - Board made changes to meeting structure to improve meeting efficiency
 - Board will approve Board Work Plan, aligned with Superintendent Work Plan
 - Board will update self-evaluation tool and governance handbook
 - Board has made numerous important but difficult decisions
 - Board Resolution 1819-0143 - Approving Coliseum College Preparatory Academy Expansion and Roots International Academy Closure
 - Board Resolution 1819-0144 - Budget Reduction Recommendation To Achieve Fiscal Year 2019-2020 3.0% Reserve for Economic Uncertainty

Topic Area 4: Board Meetings & Leadership

- OUSD Actions
 - All Board meeting minutes, videos, and actions taken since 1999, including all budget presentations and financial decisions, are online
 - <https://www.ousd.org/domain/67>
 - OUSD's Research and Development department maintain data dashboards relating to student demographics, performance, discipline and attendance, teacher data, attendance patterns, accountability, wellness, climate and culture data, post-secondary readiness data
 - <https://www.ousd.org/fiscaltransparency>
 - Viewable by school, department, resource, or expenditure type to analyze multiple years of fiscal data

Topic Area 4: Board Meetings & Leadership

Questions for Board

- What action(s) would the Board like to take with respect to the structure and format of Board meetings?
- On what areas would the Board like to focus with respect to future governance trainings and workshops?
- Are there any additions or changes to the Board Work Plan that the Board would want to consider in this area?

Topic Area 5: Culture & Capacity

- Focus:
 - Ability of and training for staff to perform duties and adhere to policies, procedures, and best practices
- Finding(s): 19-12
- Recommendation(s): 19-8

Topic Area 5: Culture & Capacity

- Building culture that values divergent perspectives, creative problem-solving and mutual accountability
- Surveys to assess culture and capacity
 - Meaningful feedback on culture factors (e.g. school/department culture; relationships with coworkers; sense of feeling valued, respected and trusted)
 - Information is used to identify most impactful professional learning
 - Goal to understand what the push and pull factors are for all employees, and use data to drive strategic planning for continuous improvement

Topic Area 5: Culture & Capacity

- OUSD Actions
 - Beacon Results provided three full-day trainings for Board, Superintendent, and senior staff
 - Defining a Healthy Culture
 - Defining a Smart Culture
 - Maintaining a Smart and Healthy Culture
 - Values-based leadership training available to all staff
 - Training scheduled for facilities department staff
 - professional skills
 - executive coaching
 - operational technical assistance

Topic Area 5: Culture & Capacity

Questions for Board

- Does this information accurately capture OUSD's actions in this area?
- Are there other examples that can help illustrate OUSD's actions?
- Are there other actions OUSD can or will undertake in this area?
- Are there any additions or changes to the Board Work Plan that the Board would want to consider in this area?

Closing Thoughts

- Thank you to Grand Jury for its work and critical suggestions
- Next steps
 - September 11, 2019 Board meeting
 - Final proposed response to Grand Jury Report presented to Board for consideration and action
 - Strive to provide responses to Board questions
- Final questions?

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