



OAKLAND UNIFIED  
SCHOOL DISTRICT

expect **Success**

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# **Progress Report: Superintendent's Work Plan Implementation**

**Wednesday, May 13, 2009**

# 2008-2009 Board's Strategic Objectives for Interim Superintendent

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- Identify key strategies to increase the number of:
  - 3<sup>rd</sup> grade students who are proficient in reading/ writing
  - 9<sup>th</sup> grade students who are proficient in Algebra
  - 12<sup>th</sup> grade students who graduate high school
- Facilitate the Board of Education's review, evaluation and policy action of current OUSD reform initiatives
- Develop a comprehensive Multi-Year Fiscal Recovery Plan

# 2008-2009 Board's Strategic Objectives for Interim Superintendent (continued)

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- Prepare the Board of Education (BOE) to competently assume full governing authority, including:
  - Return full governing authority of Pupil Achievement and Financial Administration to the BOE
  - Facilitate the BOE's search and selection of a permanent Superintendent
  - Support and lead implementation of coherent governance

# Interim Superintendent 2008-2009 Strategic Objectives

- Identify key strategies to increase the number of:
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# Strategic Objective

## Key Strategies to Meet Academic Goals

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**Academic Goal:** Students are **reading** and **writing** by the end of third grade

- Effective Literacy Instruction (standards-based instruction; site-based coaching; results-based inquiry)
- Academic English and Standard English Learner Proficiency (culturally responsive teaching)
- English Language Development and English Learner Proficiency (strengthen ELD instruction and strategies)
- Early Response to Intervention K—2 (address learning gaps, reduce special education referrals)
- Increase Access to Early Childhood Education (continue and expand Pre-K programs)

# Strategic Objective

## Key Strategies to Meet Academic Goals

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**Academic Goal:** Students succeed in **Algebra** by the end of ninth grade

- Improve Elementary Mathematics Instruction (expand Si Swun program and practices; pilot 6<sup>th</sup> grade program)
- Improve Access to Algebra (Summer Algebra Institutes, Algebra readiness curriculum, intervention at all middle schools)
- Improve Algebra Instruction and Assessment (standards-based concept lessons and modules)

# Strategic Objective

## Key Strategies to Meet Academic Goals

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**Academic Goal:** Students **graduate** ready to succeed in college and career

- Small, Personalized Learning Communities (supported small schools, small learning communities at large schools)
- Writing Proficiency Initiative (improving teaching and assessment of writing at all grade levels)
- College Awareness and Planning (redesigned College & Career Readiness unit, established more partnerships)
- Career Academies and Internships (expanded partnerships, provide quality pathways to diverse careers)

# Strategic Objective

## Key Strategies to Meet Academic Goals

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### Academic Goals Progress Report:

- Staff conducted analysis of the gaps between the current graduation requirements and the A-G requirements. Monitoring and assisting with course submission and approval process.
- Created district-wide course catalog with clear pathways to graduation. Eliminated less rigorous courses, especially non A-G core academic courses, from the course list and catalog.
- Offered summer school in grades 9 and 10 for make-up of failing grades and credit recovery



# Strategic Objective

## Key Strategies to Meet Academic Goals

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### Academic Goals Progress Report (continued):

- Restructured ELD courses for English Learners to accelerate their progress. Improving ELD instruction, particularly at the elementary level.
- Expanding Advisory curriculum to include career exploration and high school pathways. Expanding pathway options across the district; adding 4 more California Partnership Academies; submitting Career-Technical Education courses for UC/CSU A-G approval.

Status: Continuing

# Interim Superintendent 2008-2009 Strategic Objectives

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# Strategic Objective

## Board Review of OUSD Reform Initiatives

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The Interim Superintendent facilitated Board review of:

- OUSD Vision, Goals and Branding
- Expect Success Reforms
  - Expect Success Projects and Work Streams
  - Key Strategies for Return to Local Control
- Other Major Reform Initiatives
  - Small Schools
  - Results-Based Budgeting
  - Organizational Structure

# Strategic Objective

## Board Review of OUSD Reform Initiatives

### OUSD Vision, Goals and Branding

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On August 6, 2008, the Board adopted revised:

- Vision: Coherent Governance Mega Result (SR1)
  - All students will graduate as caring, competent and critical thinkers, fully informed, engaged and contributing citizens, prepared to succeed in college and career.
- Goals: Coherent Governance Student Results Policies 2-4
  - All students will meet or exceed rigorous standards in all academic disciplines.
  - Students take responsibility for themselves and the common good.
  - Students will possess personal motivation, skills and resiliency necessary for success in life and the workplace.
- Branding: Expect Success branding maintained
  - Expect Success: Every student. Every classroom. Every day.

# Strategic Objective

## Board Review of OUSD Reform Initiatives

### Expect Success Projects

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On August 6, 2008, the Board reviewed the 28 Expect Success projects that sought to address:

- High Standards of Teaching & Learning
- High Standards of Service to Schools
- Infrastructure & Support

These projects informed the Interim Superintendent's recommendations to the Board of 2008—2009 strategies for the return to local control.

# Strategic Objective

## Board Review of OUSD Reform Initiatives Key Strategies for Return to Local Control

On August 6, 2008, the Board accepted these 2008—2009 strategies for return to local control:

- Excellence in Teaching & Learning
  - Standard-Based Instruction
  - Professional Learning Communities
  - College and Career Readiness
- Family & Community Engagement
  - Board Engagement Sessions with High Schools and Red Schools
- Service & Accountability
  - Performance Management (Results-Based Inquiry, School Portfolio Management, Use Your Voice)
  - Service Excellence Culture (RATER Training, Continuous Process Improvement)

# Strategic Objective

## Board Review of OUSD Reform Initiatives Key Strategies for Return to Local Control

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On August 6, 2008, the Board accepted these 2008—2009 strategies for return to local control (continued):

- Leadership Development & Supporting Our Employees
  - Teacher Recruitment and Retention
  - Leadership Development
  - Classified Professional Development
- Aligned and Sustainable Budgets
  - Increased Local Decision-Making (RBB)
  - Invest in and Utilize Technology to Build Smart Operational Practices; IFAS upgrade to 7.7. system
  - Fiscal Solvency
  - Multi-Year Financial Sustainability Plan

# Strategic Objective

## Board Review of OUSD Reform Initiatives

### Other Major Reform Initiatives

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#### Small Schools

- September 2008: Right-Sizing Plan for small schools introduced for discussion by the Board
- September—November 2008: Community Forums conducted to establish criteria for possible school closure
- November 2008: Board considered the Stanford Study of Oakland School Reform (aka Small Schools Evaluation) by Linda Darling-Hammond
- December 2008: Board established the School Portfolio Management process as criteria for school closure and identified focus schools
- Ongoing: Board, staff and community engagement around focus schools and future options



# Strategic Objective

## Board Review of OUSD Reform Initiatives

### Other Major Reform Initiatives

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#### Results-Based Budgeting (RBB) and the Service Economy

- Conducted internal staff analysis of RBB
- Considered stakeholder and principal input on RBB
- November 2008: Board considered the American Institute for Research Study on Results-Based Budgeting
- Decision to continue RBB implementation with some adjustments and more guidelines; developed RBB Handbook for Principals
- While some OUSD services can be “purchased” through RBB, it was determined that a full Service Economy was not feasible in the district. The focus is on **Service Culture**, including quality customer service and data-driven service quality improvements.

# Strategic Objective

## Board Review of OUSD Reform Initiatives

### Other Major Reform Initiatives

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#### Organizational Structure

- **Organizational Chart:** In August 2008, the Superintendent revised the organizational structure from a bifurcated system of Service Organization and Educational Leadership Organization to a more traditional school district structure.
- **Responsibility Alignment under Chiefs:** In August 2008, the Superintendent changed the reporting relationship of some departments between Chiefs. These responsibilities were adjusted again upon the departure of the Chief of Community Accountability.
- **Name Change:** The “Superintendent’s Cabinet” replaced the “Strategy Team” as the decision-making body in the district.

# Strategic Objective

## Board Review of OUSD Reform Initiatives

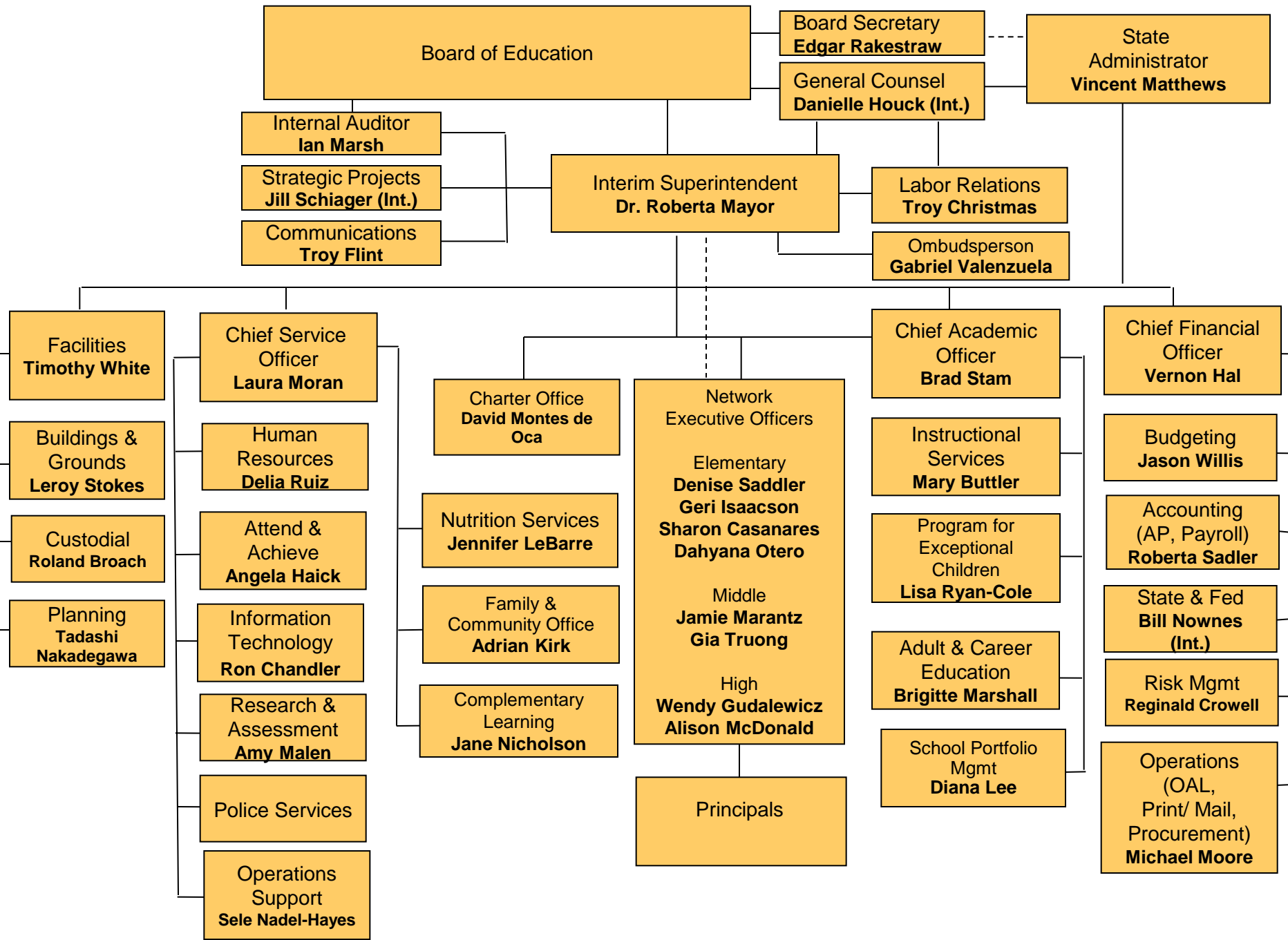
### Other Major Reform Initiatives

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#### Organizational Structure (continued)

- **Board/ Staff Relations:** The Interim Superintendent has focused attention on building a smooth working relationship between the district staff and the Board of Education. This includes assisting district administrators as they learn to work with and for a governing board, and assisting board members to recognize district administrators as the staff responsible for implementing board policy and managing district operations.

Status (Board Review of Reform Initiatives): Completed



Board of Education

Board Secretary  
**Edgar Rakestraw**

General Counsel  
**Danielle Houck (Int.)**

State Administrator  
**Vincent Matthews**

Internal Auditor  
**Ian Marsh**

Strategic Projects  
**Jill Schiager (Int.)**

Communications  
**Troy Flint**

Interim Superintendent  
**Dr. Roberta Mayor**

Labor Relations  
**Troy Christmas**

Ombudsperson  
**Gabriel Valenzuela**

Facilities  
**Timothy White**

Chief Service Officer  
**Laura Moran**

Charter Office  
**David Montes de Oca**

Network Executive Officers

Elementary  
**Denise Saddler**  
**Geri Isaacson**  
**Sharon Casanares**  
**Dahyana Otero**

Middle  
**Jamie Marantz**  
**Gia Truong**

High  
**Wendy Gudalewicz**  
**Alison McDonald**

Principals

Chief Academic Officer  
**Brad Stam**

Chief Financial Officer  
**Vernon Hal**

Buildings & Grounds  
**Leroy Stokes**

Human Resources  
**Delia Ruiz**

Nutrition Services  
**Jennifer LeBarre**

Instructional Services  
**Mary Buttler**

Budgeting  
**Jason Willis**

Custodial  
**Roland Broach**

Attend & Achieve  
**Angela Haick**

Family & Community Office  
**Adrian Kirk**

Program for Exceptional Children  
**Lisa Ryan-Cole**

Accounting (AP, Payroll)  
**Roberta Sadler**

Planning  
**Tadashi Nakadegawa**

Information Technology  
**Ron Chandler**

Complementary Learning  
**Jane Nicholson**

Adult & Career Education  
**Brigitte Marshall**

State & Fed  
**Bill Nownes (Int.)**

Research & Assessment  
**Amy Malen**

Police Services

Operations Support  
**Sele Nadel-Hayes**

Risk Mgmt  
**Reginald Crowell**

Operations (OAL, Print/ Mail, Procurement)  
**Michael Moore**

# Interim Superintendent 2008-2009 Strategic Objectives

- Identify key strategies to increase the number of:
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# Strategic Objective

## Multi-Year Recovery Plan

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### Multi-Year Financial Sustainability Plan Progress Report:

- A second draft of the Multi-Year Financial Sustainability Plan (MYFSP) was presented to the Board in November 2008.
- Meetings were conducted with stakeholder groups in December and January to solicit reaction and input.
- The third and final draft of the MYFSP was presented to the board on January 29, 2009 for review and adoption.
- The MYFSP was adopted on January 29, 2009.
- Additional items for inclusion were requested by a Board member. These will be presented for an amendment to the MYFSP in June 2009.

# Strategic Objective

## Multi-Year Recovery Plan

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Multi-Year Financial Sustainability Plan Progress Report:

Status: Completed

### Addendum: Asset Management Plan

The Board requested the development of an Asset Management Plan. A Request for Proposals was developed in fall 2008. A proposal was selected in spring 2009. The district is determining how it can fund the plan which is estimated to be \$160,000 (core) to \$225,000 (expanded).

# Interim Superintendent

## 2008-2009 Strategic Objectives (continued)

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- Prepare the Board of Education (BOE) to competently assume full governing authority, including:

- Return full governing authority of Pupil Achievement and Financial Administration to the BOE

- Facilitate the BOE's search and selection of a permanent Superintendent
- Support and lead implementation of coherent governance



# Strategic Objective

## Return Pupil Achievement and Financial Administration to BOE Governing Authority

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### Full Local Governance Progress Report:

- July/ August 2008: Superintendent developed a study agreement with the Fiscal Crisis and Management Assistance Team (FCMAT) to conduct an annual assessment of the district's progress toward meeting the criteria for a return to local authority of the areas of Pupil Achievement and Finance.
- August/ September 2008: Superintendent facilitated and monitored the preparation of staff reports for the October FCMAT visit.
- September 2008: Approved State Budget did not include funds to pay for the ongoing assessments of districts under state receivership. The district was required for the first time to pay for this assessment.

# Strategic Objective

## Return Pupil Achievement and Financial Administration to BOE Governing Authority

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### Full Local Governance Progress Report:

- December 8, 2008: FCMAT assessment report was issued. FCMAT reported that the district had met the established criteria, and FCMAT recommended to the State Superintendent of Public Instruction the consideration of returning the remaining operational areas under state receivership, Pupil Achievement and Financial Management, to local Governing Board authority.

Status: Completed

# Strategic Objective

## Return Pupil Achievement and Financial Administration to BOE Governing Authority

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### Full Local Governance Update:

- The District is awaiting the State Superintendent's action to return all areas of operations to local Governing Board control and install a State Trustee in place of the State Administrator.
- Dialogue continues with board members about the appropriateness of Board involvement in management decisions.
- All Board members have not yet absorbed that central and site administrators are loyal employees of the Board, not state administration.

# Interim Superintendent

## 2008-2009 Strategic Objectives (continued)

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- Prepare the Board of Education (BOE) to competently assume full governing authority, including:
  - Return full governing authority of Pupil Achievement and Financial Administration to the BOE
  - Facilitate the BOE's search and selection of a permanent Superintendent
  - Support and lead implementation of coherent governance

# Strategic Objective

## Permanent Superintendent Search

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### Superintendent Search Progress Report:

- Fall 2008: Interim Superintendent established a Request for Applications for individuals and/or agencies to assist the district in conducting a superintendent search process. The RFA was distributed to individuals and agencies. Seven responses were received.
- January 2009: A Board Committee was appointed to review applications. The committee invited three agencies to interview with the committee, and recommended to the full board that the agency Ray and Associates, headquartered in Iowa, be contracted to conduct the Oakland superintendent search process.

# Strategic Objective

## Permanent Superintendent Search

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### Superintendent Search Progress Report (continued):

- Following the board's approval of Ray and Associates, the Board began working directly with Ray and Associates.
- The superintendent search process is in progress and a new superintendent is anticipated to be selected and ready to begin work in the district on July 1, 2009.

Status: In Progress

# Interim Superintendent

## 2008-2009 Strategic Objectives (continued)

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- Prepare the Board of Education (BOE) to competently assume full governing authority, including:
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# Strategic Objective

## Implementation of Coherent Governance

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### Coherent Governance Implementation Progress Report:

- The Interim Superintendent continues to implement the Board's Coherent Governance plan.
- The Coherent Governance Student Results policies have become the District's vision and goal statements under local authority.
- At the December 12-13, 2008 Board Retreat, the Board identified its instructional priority for the next several years as High-Quality Instruction in Every Classroom.
- Operational Expectations (OE's) are being aligned with the Board's identified instructional priority, and regular reports are made to the board on the implementation of the OE's.



# Strategic Objective

## Implementation of Coherent Governance

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### Coherent Governance Implementation Progress Report (continued):

- In February 2009, the Coherent Governance calendar of the Operational Expectations presentations to the board was revised. Cabinet is committed to providing progress reports on the district's compliance with the Operational Expectations and the Student Results policies.
- Reports on Operational Expectations and Student Results are provided for discussion in committee and forwarded to the full board for adoption.

Status: In Progress

# Strategic Objectives Summary

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  - 12<sup>th</sup> grade students who graduate high school
    - **Status: Continuing**
- Facilitate the Board of Education's review, evaluation and policy action of current OUSD reform initiatives
  - **Status: Completed**
- Develop a comprehensive Multi-Year Fiscal Recovery Plan
  - **Status: Completed**

# Interim Superintendent

## 2008—2009 Strategic Objectives Summary

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- Prepare the Board of Education (BOE) to competently assume full governing authority, including:
  - Return full governing authority of Pupil Achievement and Financial Administration to the BOE
    - **Status: FCMAT Assessment Completed**
    - **Awaiting State Superintendent's Action**
  - Facilitate the BOE's search and selection of a permanent Superintendent
    - **Status: In Progress**
  - Support and lead implementation of coherent governance
    - **Status: Continuing**

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# ADDENDUM

# Summary of Progress 2008-09

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## Progress on Fiscal Solvency

- Developed a Multi-Year Financial Sustainability Plan (adopted January 2009)
- Worked to address Audit Penalties for 2002-03, 2003-04, 2004-05, 2005-06
- Facilitated Technology upgrade to IFAS 7.7 (system transfer on March 31st)
- Established improved, on-line system for developing and monitoring professional consulting contracts
- Supervised district budget reductions for 2008-09 and 2009-10 in response to the state budget cuts; facilitated discussions for ongoing priorities

# Summary of Progress 2008-09

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## Progress on Fiscal Solvency (continued)

- Supported forensic fiscal review by Vavrinik, Trine and Day (VTD) to identify discrepancies that led the State Controller's Office to disclaim on its annual audits conducted for the district.
- Hired an Internal Auditor, directed his work to address attendance issues, Associated Student Body accounts and other school subsidiary accounts, and support the VTD review.
- Supported Attend & Achieve initiatives to increase student outreach and agency partnerships to return students to school.

# Summary of Progress 2008-09

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## Identified Continuing Fiscal Needs

- State loan funds may be needed to address the Cash and Liability Issues discovered through the VTD forensic review of district accounts 2002-03 to 2007-08.
- Inter-fund borrowing from other district funds will be needed to address the cash flow shortfall in June 2009 due to the state's deferral of district apportionment.
- Chabot Observatory COP needs to be addressed. The District is assisting the Chabot Observatory to meet its COP debt and working to refinance the variable loan.

# Summary of Progress 2008-09

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## Progress on Instruction

- Conducted Review of all Expect Success reforms; identified district strategies for the Board to continue to support
- Worked with the Board to establish a new priority focus for instruction
- Implemented a comprehensive standards-based formative assessment system
- Quadrupled the number of summer intervention programs for struggling students
- Clarified the process for conducting school closures using the School Portfolio Management Process



# Summary of Progress 2008-09

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## Progress on Instruction (continued)

- Refocused secondary instruction on College and Career Readiness and career/technical options
- Revised high school course listings and developed a district-wide high school course catalog
- Supported refocus of adult education on dropout recovery, high school graduation, vocational options, and enrichment; facilitated reorganization of the ROP into a JPA

# Summary of Progress 2008-09

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## Other Accomplishments

- Brought closure to the FCMAT monitoring and assessment reviews; assisted the District in complying with recommendations and meeting established criteria for return of local governance.
- Initiated the Superintendent Search process for the district.
- Facilitating the implementation of the Coherent Governance.
- Assigned an OAL Commissioner and supported the continuation of the OAL as an individual league.
- Implemented technology efficiency software to increase technology reliability and decrease energy costs
- Implemented e-rate funded infrastructure upgrades at several schools, thereby increasing internet access and reliability

# Summary of Progress 2008-09

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## Other Accomplishments (continued)

- Renegotiated technology leases and software licenses to reduce technology costs
- Worked with staff and the Board to facilitate and adopt a Local Vendor Policy.
- Worked with staff and the Board to develop priority focus on quality instruction in the classroom.

# Summary of Progress 2008-09

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## Continuing Challenges for the Board

- Need for the Board to continue to support the identified key strategies.
- Need to take action to close/merge very small schools; establish a time table of 3-4 schools per year for 3-4 years
- Need to develop a plan for the central office building and property
- Need to address the resolution of the COP debt of the Chabot Observatory
- Need to increase the district's required minimum reserve level from 2% to 3%
- Need for the Board to work cohesively as a unit
- Need for the Board to value the skills and competencies of the administrative staff of the district

# Our Number One Priority is to have high-quality instruction in every classroom that results in high levels of learning for every student

To address this priority, the District will:

1. Have a principal at every school who is an effective and strategic instructional and organizational leader (OE-6, OE-11)
2. Increase retention of committed, caring, and effective teachers at every school, especially in low-performing schools with high teacher turnover (OE-6)
3. Support every teacher with high quality professional development, mentoring, collaboration, and observation/feedback (OE-6, OE-11)
4. Create school program designs and organizational practices that enable teachers to personalize student learning (OE-11, OE-12)

# Our Number One Priority is to have high-quality instruction in every classroom that results in high levels of learning for every student

To address this priority, the District will:

5. Provide schools guided budget authority and opportunities for curricular flexibility (OE-8, OE-12)
6. Provide safe and supportive conditions that foster students' physical, emotional, and social readiness to learn (OE-10, OE-11, OE-12, OE-13, OE-14)
7. Provide school facilities and infrastructure that enable the delivery of high-quality instruction (OE-9, OE-10)
8. Continuously monitor performance quality and impact in every classroom, school, and department (OE-6, OE-11, OE-12)

# Our Number One Priority is to have high-quality instruction in every classroom that results in high levels of learning for every student

To achieve these District strategies, the OUSD Board of Education will:

1. Hire and retain a Superintendent who is a proven leader in strengthening and improving classroom instruction (BSR-5, OE-1, OE-2, OE-11)
2. Establish strategic partnerships with community, labor, business, civic, education, philanthropic, and governmental leaders that help strengthen and improve classroom instruction (GC-3; OE-5)
3. Increase revenues, protect assets, and optimize the use of all available resources toward strengthening and improving classroom instruction (OE-7; OE-8, OE-9)