



**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

Superintendent's Work Plan 3b

November 30, 2016 Update



Presented to Board of Education

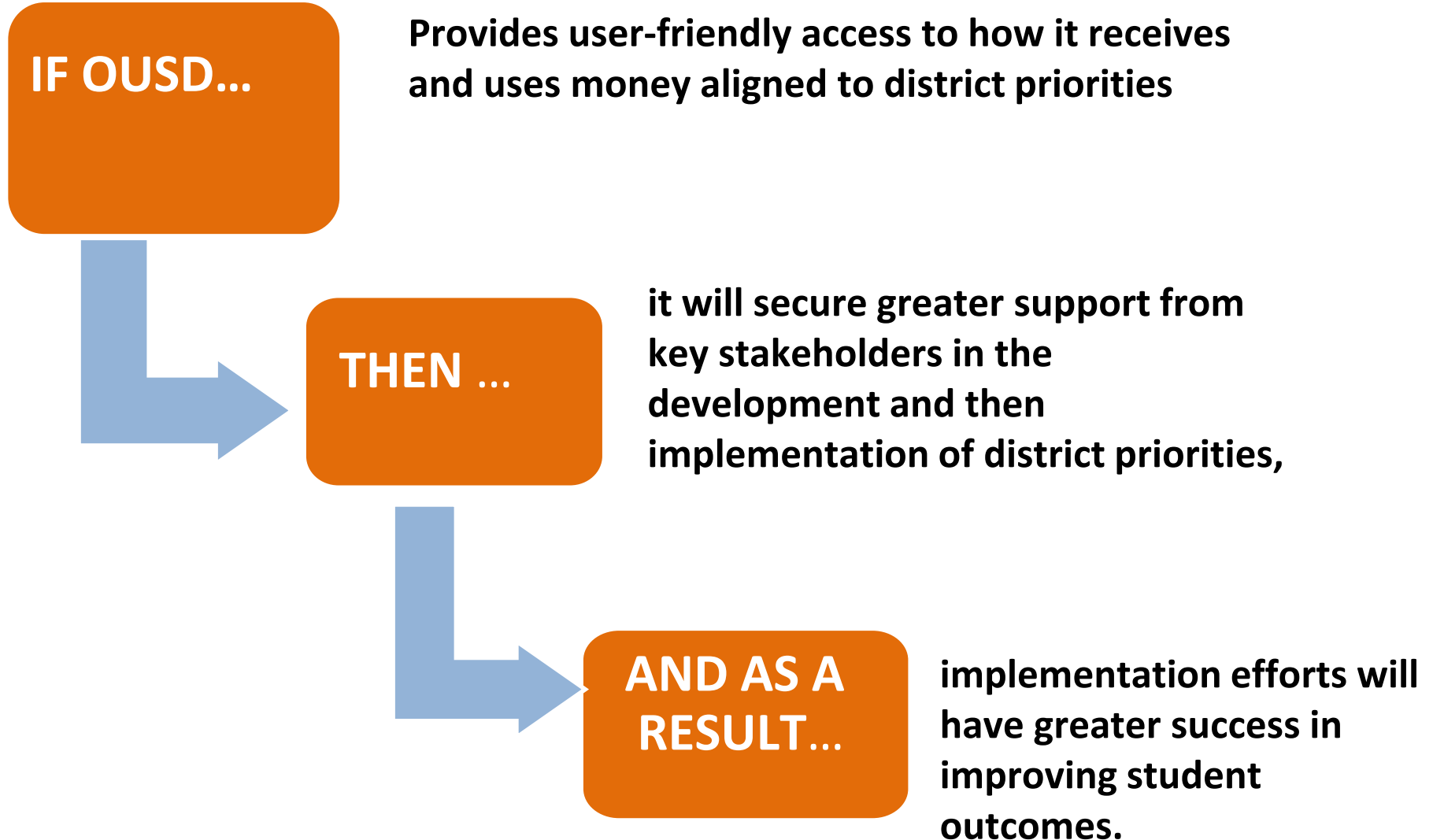
November 30, 2016



Superintendent Work Plan #3b

Continue to refine and customize the web based budget tool for public use that displays real-time budget data and clearly displays all revenue streams and expenditures as they relate to district priorities

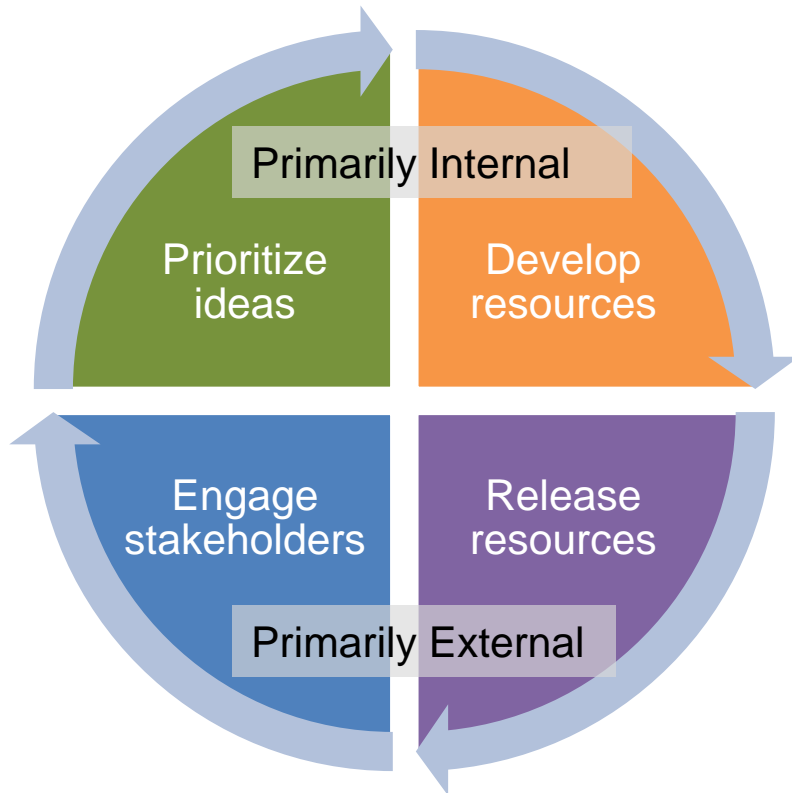
3b: Theory of Action





Process of Development

Development Cycle



Key Engagement Tools

- ✓ Stakeholder Map
- ✓ Interview Template
- ✓ Product Survey
- ✓ Visual examples of tools (mockups)
- ✓ Product Roadmap
- ✓ Workshops & Trainings
- ✓ Communications materials





Broad Outreach for Input

Stakeholder groups

- Alternatives in Action
- Californians for Justice
- East Bay Asian Youth Center
- Ed Trust West
- Labor Unions
- LCAP Manager
- Measure G and N Committees
- Oakland Community Organizations
- Oakland Parents Together
- Parent Leadership Action Network
- PSAC Liaison

District Budget Advisory Committee

Members from several of the stakeholder groups came together periodically in 2015-16 and collectively provided guidance on types of tools needed as well as other areas of improving budget transparency.



Multiple audiences, multiple resources

WEBSITE

www.ousd.org/fiscaltransparency

- Annual Financial Snapshot
- Explanation of key terms or issues
- Audits, Presentations and Records
- Link to additional resources
- How to get involved (e.g. LCAP, Measure N)

T O O L S

District-wide

- Clarify the sources of funds used
- Link LCAP Strategies to Expenditures
- Identify funds spent directly at school vs. elsewhere

School Focused

- Support comparison of schools based on focus areas
- Link LCAP Strategies to Expenditures
- Support SSC input on discretionary expenditures

Interested Citizen

- Show investments alongside outcomes
- Clarify funds supporting key strategic themes
- Remove educational “jargon”

ALL

EASY TO

USE

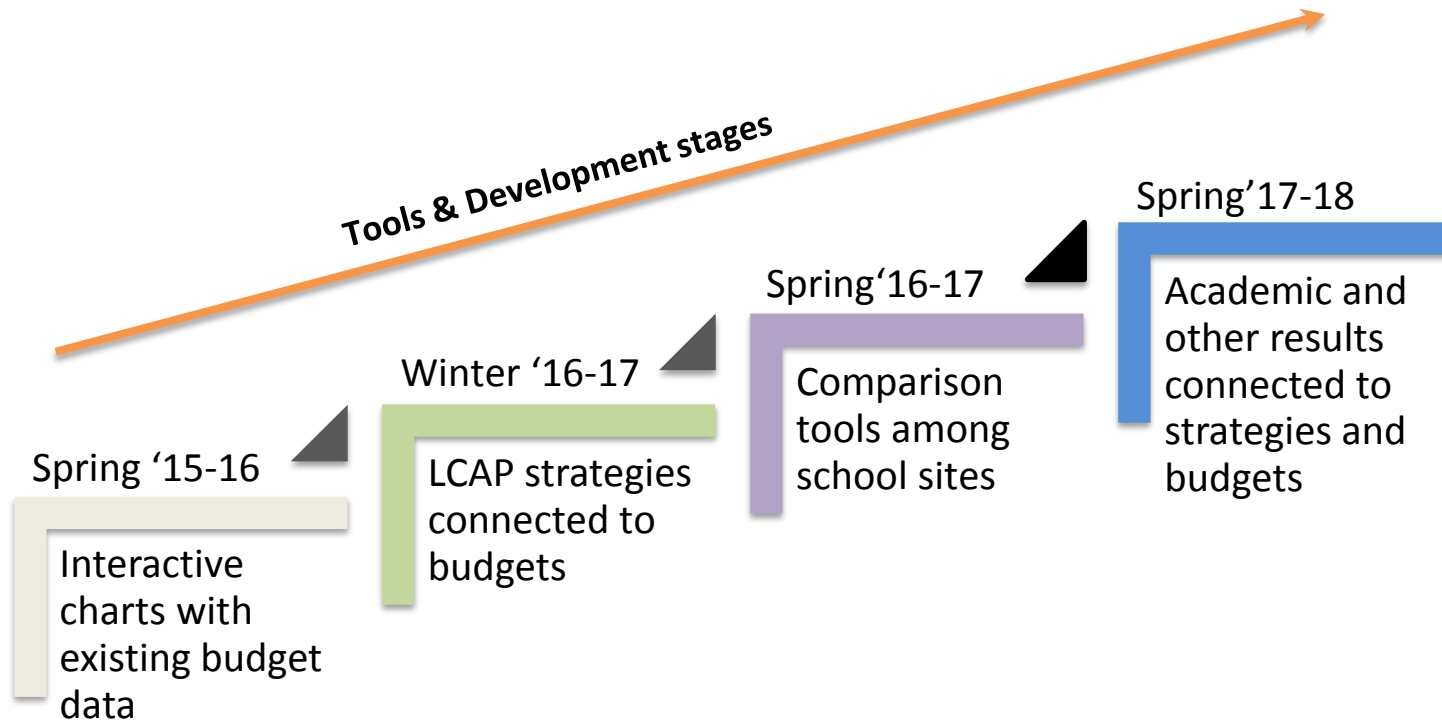
ENABLE

COMPARISON

FLEXIBLE FOR DIFFERENT

AUDIENCES

Roadmap includes iteration and new tools





Brief demo of working example

Winter '16-17 (Jan 17th)

LCAP
strategies
connected to
budgets

District-wide

- Where does the money come from? (Funding Source)
- Where is unrestricted money spent? (Location)
- What strategies does the money support? (LCAP Goals)
- What does the money pay for? (Budget Category)

LIVE DEMONSTRATION





Next steps toward January Launch

- **Validate and load LCAP information into financial system**
- **Input 1st Interim Financial data**
- **Continue stakeholder feedback sessions**
- **Develop online, paper, video and in-person training guides**
- **Train “data experts” among stakeholder groups. If interested contact troy.christmas@ousd.org**
- **Begin stakeholder listening sessions for school-focused tool**

Appendix

Major Activities and Milestones

Workplan 3b Major Activities & Milestones	School Year 2016-17									
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
Develop mockup of budget tool with District-wide focus for feedback		10/21								
Accurately reflect LCAP action areas and S&C investments in IFAS		10/31								
Complete working demo of budget tool with District-wide focus			11/14							
Complete stakeholder feedback on mockup and demo			11/23							
Board update and public demo of prototype			11/30							
Update tool with first interim data				12/31						
Launch District-wide focused tool					1/17					
Complete trainings/presentations						2/24				
Complete mockup of school focused tool							3/11			
Complete working demo of budget tool with school focus								4/5		
Complete stakeholder feedback on mockup									5/1	
Launch school focused tool									5/19	

Progress Summary

Superintendent Work Plan 3b - Financial Transparency Portal and web-based budget tools

Goal	3b. Continue to refine and customize the web based budget tool for public use that displays real-time budget data and clearly displays all revenue streams and expenditures as they relate to district priorities.
Deliverable for Jun 17	1. Updated tool incorporating LCAP action areas 2. Updated website and resources with baseline & growth analytics
RACI	R: Troy Christmas; C: Susan Beltz (IT), Juan Du (RAD), Valerie Goode (Communications) A: Vernon Hal (Carey Ash)

Project Status	Project Overall	Schedule	Scope	Budget
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Major Milestones	Due Date	Status
1.Accurately reflect LCAP action areas & S&C in IFAS	10/31	Behind
2.Complete feedback gathering on revised tool	11/23	On track
3.Complete working demo	11/30	On Track
4.Launch Revised Tool	1/17	On track
5.Complete round 1 of training	2/24	On track

Indicators of 2016-17 impact		
Indicator	Target	Current
Awareness Survey	60% Awareness	1st Survey in Apr '17
Segmented Survey	70% Awareness & Usefulness (segmented groups)	1st Survey in Apr '17
Website traffic	30% growth	TBD

Current Month Accomplishments
<ul style="list-style-type: none"> Completed wireframe for charts and gain feedback with stakeholders (2) Completed data structure and initial data inputs for testing (3) Completed Tableau worksheets from initial data inputs for validation (3) Accessed usage analytics for Tableau dashboards (4) Accessed Google Analytics for district website and financial transparency portal (4)

Upcoming Activities
<ul style="list-style-type: none"> Tableau development of tool Work with IT on BDT tool improvements and capture of data in IFAS (1) Reconcile method to get LCAP data into IFAS (1) Validate data structure with finance team (3) Add analytics tracking and reports for financial transparency website (4)

Key Issues/Risks to Raise
<ul style="list-style-type: none"> Limitations of BDT improvements in time frame (1) Limitations of IFAS to capture and hold disaggregated action area data at proper grain size (1) Communications issues associated with mis-identification of action areas (1)

Status Legend:

At risk	Done / Completed
On track	Behind track

Sub-goal & Impact through 2019 - Update

Continue to refine and customize the web based budget tool for public use that displays real-time budget data and clearly displays all revenue streams and expenditures as they relate to district priorities.

Impact by June 2017	2017-2018	2018-19
<p>AWARENESS</p> <ul style="list-style-type: none"> 1. Parent groups, employees and advocates are more aware of types of district revenues and expenditures in service of student needs 1. School leaders have user-friendly tools to share budget information with stakeholders 1. Internal and external stakeholders agree that OUSD provides greater financial transparency than in prior years 1. Expand accessibility and reach with mobile dashboards and charts of key information embeddable on District website, 3rd party sites 	<p>ENGAGEMENT</p> <ul style="list-style-type: none"> 1. Parents groups, employees and advocates more informed and engaged in development and support of District priorities and the investments needed for success 1. Empower school communities with school-focused dashboards that combine finance, human capital, enrollment and student results data aligned to LCAP & Pathway to Excellence 1. Support multi-year comparisons within all dashboards 	<p>DECISION-MAKING</p> <ul style="list-style-type: none"> 1. <i>Engagement of all stakeholders supported by development of impact metrics included with key dashboards to show drivers of student success</i>

EVERY STUDENT THRIVES!



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