Resource & Strategy Alignment in OUSD

ERS Summary Report ● June 2016

OUSD has set ambitious goals and targets in Pathway to Excellence…

…that will require deep investment and strong execution in effective strategy over the next several years

ERS analyzed a broad series of datasets from SY1415, complemented by interviews with district leaders and stakeholders to help OUSD:

1. Better **align resources** (people, time & money) with OUSD's strategy to improve student performance

2. **Define, prioritize and sequence** critical changes and actions that enable OUSD to act on these opportunities

3. **Inform and leverage the expertise of key stakeholders** around proposed changes and critical actions

In addition, where relevant, we highlighted promising practices across the district…

Spotlight: School X

Teachers: *Total Teacher FTEs*
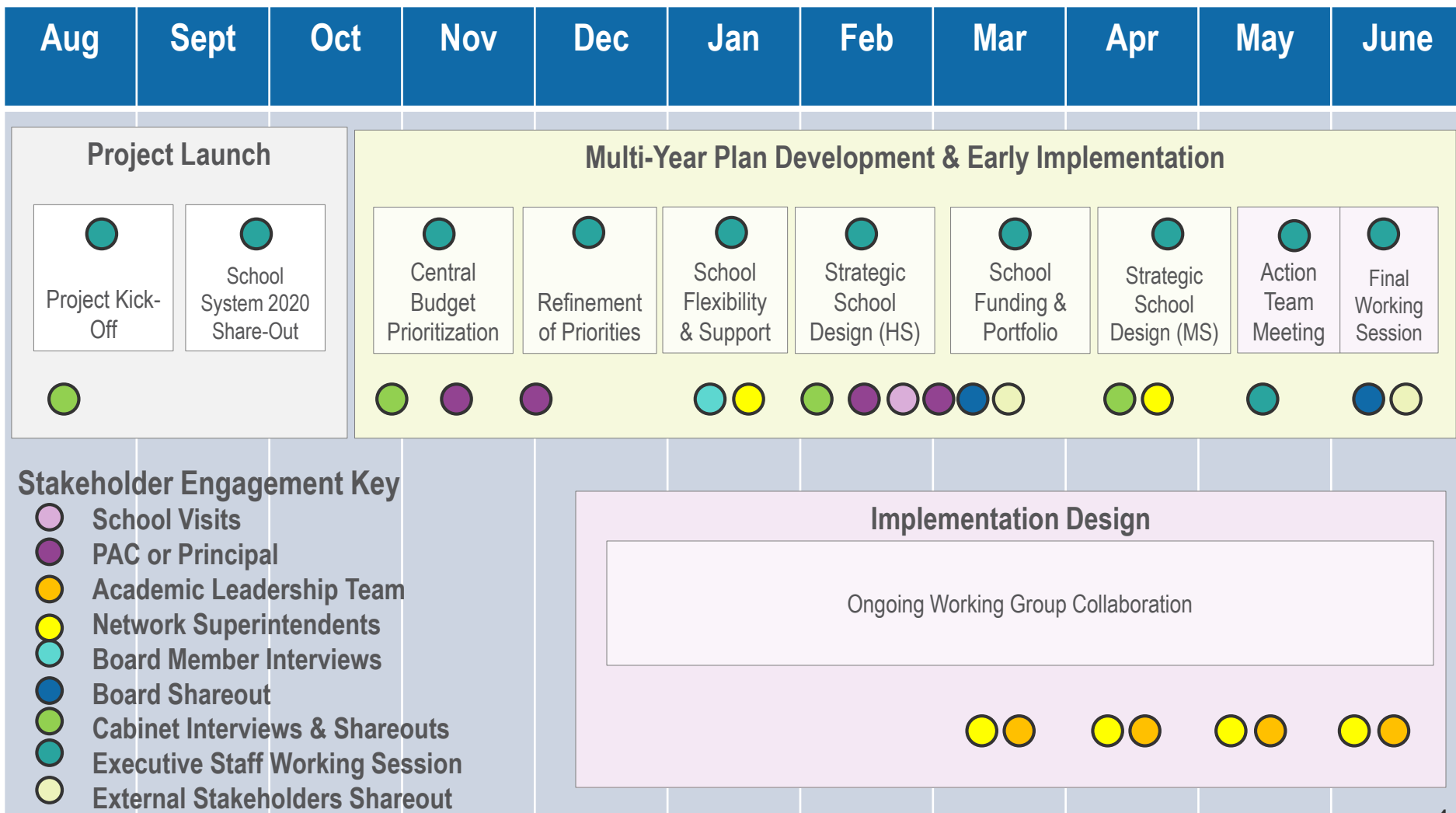
Students: *Student Enrollment*

Average Class Size:

Average Teacher Load (Core): *total number of unique students served by a teacher*

% of Teachers cross core content:*% of teachers instructing 2 or more of the following subjects: ELA, Math, Science, Social Studies, and Foreign Language*

Teacher Utilization: *% of the student day that a teacher is instructing a course*

…in order to cross-pollinate or inspire innovation thinking throughout OUSD

ERS' work in OUSD has included deep engagement of the Executive Cabinet, with feedback from a variety of stakeholders over the last 10 months

Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June

Project Launch
- Project Kick-Off
- School System 2020 Share-Out

Multi-Year Plan Development & Early Implementation
- Central Budget Prioritization
- Refinement of Priorities
- School Flexibility & Support
- Strategic School Design (HS)
- School Funding & Portfolio
- Strategic School Design (MS)
- Action Team Meeting
- Final Working Session

Stakeholder Engagement Key
- School Visits
- PAC or Principal
- Academic Leadership Team
- Network Superintendents
- Board Member Interviews
- Board Shareout
- Cabinet Interviews & Shareouts
- Executive Staff Working Session
- External Stakeholders Shareout

Implementation Design

Ongoing Working Group Collaboration

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The partnership between OUSD and ERS intended to both further the 2015-2016 work plan…

…and *inform* next steps for the years to come

Executive Summary – 1/3

Areas of Focus	Summary of Analysis and Insights
Spending Patterns in OUSD	- The total per-pupil spend in OUSD is lower than we see in other urban districts nationally - The share of investment in Instruction is the lowest among comparison districts
School Funding Levels	- OUSD spends >10% more per pupil at the HS level than ES & MS - Per-pupil funding levels across middle and high schools vary greatly, even after adjusting for differences in student need across schools - The variation that exists in elementary schools is related to average teacher compensation, disproportionately affecting schools with high concentrations of ELL students - Middle and high schools with low-enrollment typically are higher funded

Executive Summary – 2/3

Areas of Focus	Summary of Analysis and Insights
Elementary School Resource Use & Design	▪ While OUSD has less instructional time than national benchmarks overall, elementary schools have even less instructional time than middle and high schools in OUSD ▪ The lack of non-core classes built into school day in many schools creates inequity and limits meaningful teacher collaboration
Middle School Resource Use & Design	▪ Half of incoming 6th graders are reading *Multiple Years Behind* grade level expectations (2nd grade average). ▪ Between 5th and 6th grade, students who are *Above Grade Level* are 2.2x as likely to leave OUSD than their classmates who are *Multiple Years Behind* ▪ The relationship between student grades and SBAC scores varies widely across schools, suggesting differences in rigor and/or curricular alignment across schools
High School Resource Use & Design	▪ 54% of all high schools, serving 42% of HS students, in SY1415 would enable a "typical student" to graduate with the requisite A-G aligned credits in 4 years given the HS master schedule structures, policy, contractual agreements and the short school day

Executive Summary – 3/3

Areas of Focus	Summary of Analysis and Insights
Programs for Exceptional Children	▪ OUSD's per-pupil spend on more Self-Contained/"Special Day Classrooms" is 35% higher than observed elsewhere ▪ OUSD serves a higher share of students with disabilities in more restrictive/separate placements than other districts studied ▪ African-American boys are disproportionately identified as students with disabilities (SWD) and placed in more restrictive environments
School Portfolio	▪ The large numbers of under-enrolled schools in OUSD make it difficult to provide students with a complete set of services consistent with the Pathway to Excellence vision and provide teachers with working conditions that foster professional growth and effective practice
School Support	▪ OUSD's theory of action requires school-level autonomy/flexibility over school design; yet less resources are controlled by schools in OUSD relative to comparison districts ▪ Network superintendents supervise a strategically lower number of schools than observed in other districts; their supports are most highly rated by principals

How to Read the ERS Summary Report

- The ERS Summary Report is organized into 8 sections based on project focus areas
    - Each section is labeled on the top left of the slides
    - At the beginning of each section, there is a summary of questions, insights, and action implications that draws from the analysis ERS has done in this area
    - Data analysis conducted and summarized by ERS supports each of the anchor slides

- Unless otherwise noted, the year of analysis is SY2014-2015

- Refer to the Appendix for information on ERS, definitions of ERS-specific terminology, and additional analysis

[Topic]

[Topic]

- *Key Question(s)*

- *Summary of Analysis & Insights*

- *Action Implications*

Spending Patterns in OUSD:

How does OUSD's overall spending level and patterns differ from other large urban districts?

Spending Patterns in OUSD

- *Key Question*
  - How does OUSD's overall spending level and patterns differ from other large urban districts?

- *Summary of Analysis & Insights*
  1. The total per-pupil spend in OUSD is lower than we see in other urban districts nationally
  2. The share of investment in Instruction is the lowest among comparison districts

- *Action Implications*
  1. As part of future budget cycles, increase the proportion of dollars spent at the school level, and on instruction, in alignment with the theory of action for school improvement
  2. Longer term, explore options for increasing total revenue to invest fully in OUSD's envisioned student experience

In SY14-15, OUSD spent ~$416M to educate its PreK-12 grade students
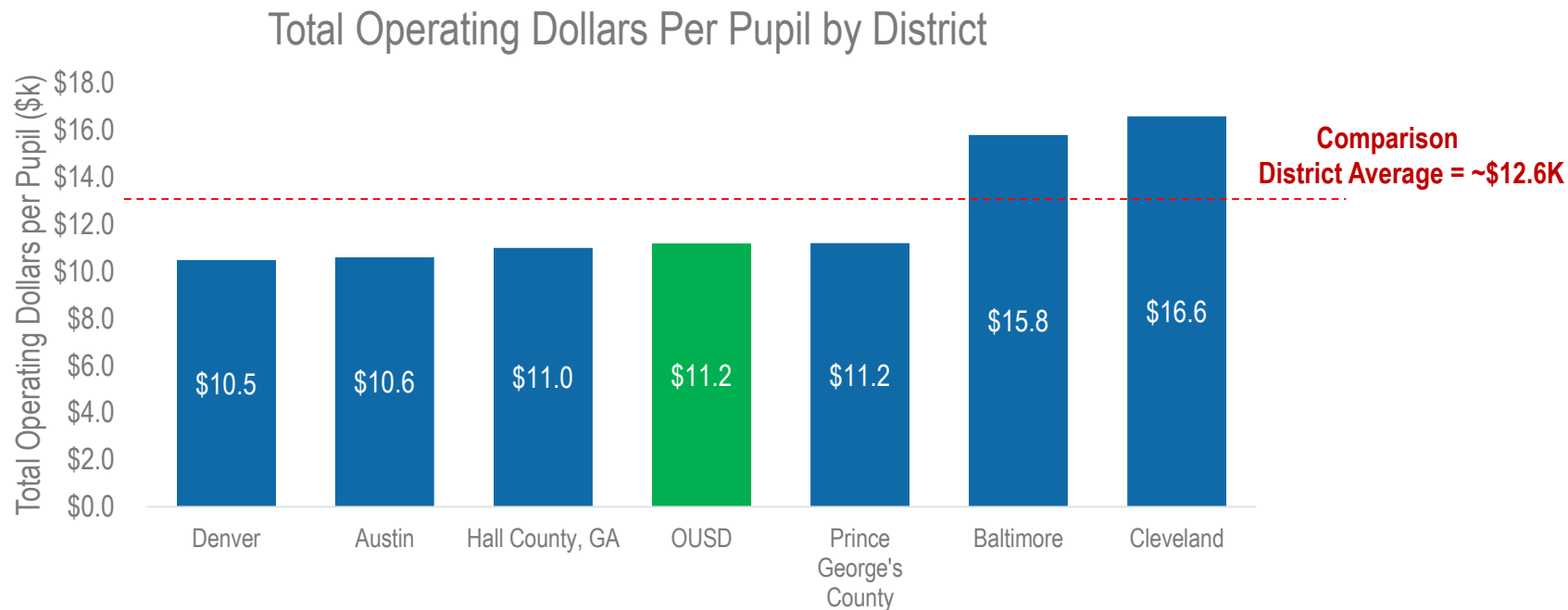
OUSD SY14-15 Operating Expenditures
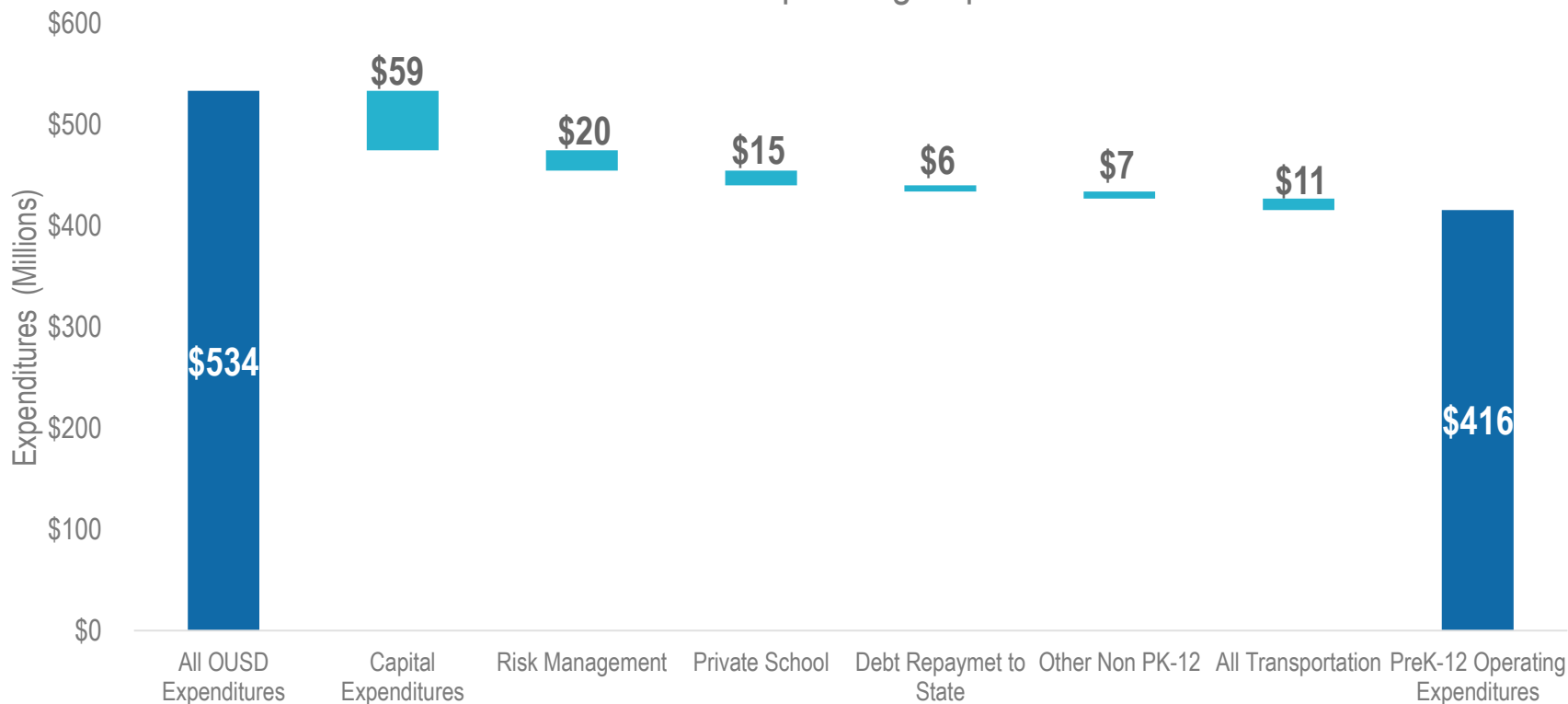
$Per Pupil (k)	$14.4K	$1.6K	$0.5K	$0.4K	$0.2K	$0.2K	$0.3K	$11.2K

Source: ERS Analysis; OUSD SY14-15 Expenditure Data

Note: Other Non PK-12 include adult education, infant and childcare, etc.

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To better understand *how* OUSD uses its resources, we compared spending to that of large urban districts with similar profiles

Total Operating Dollars Per Pupil by District

Comparison District Average = ~$12.6K

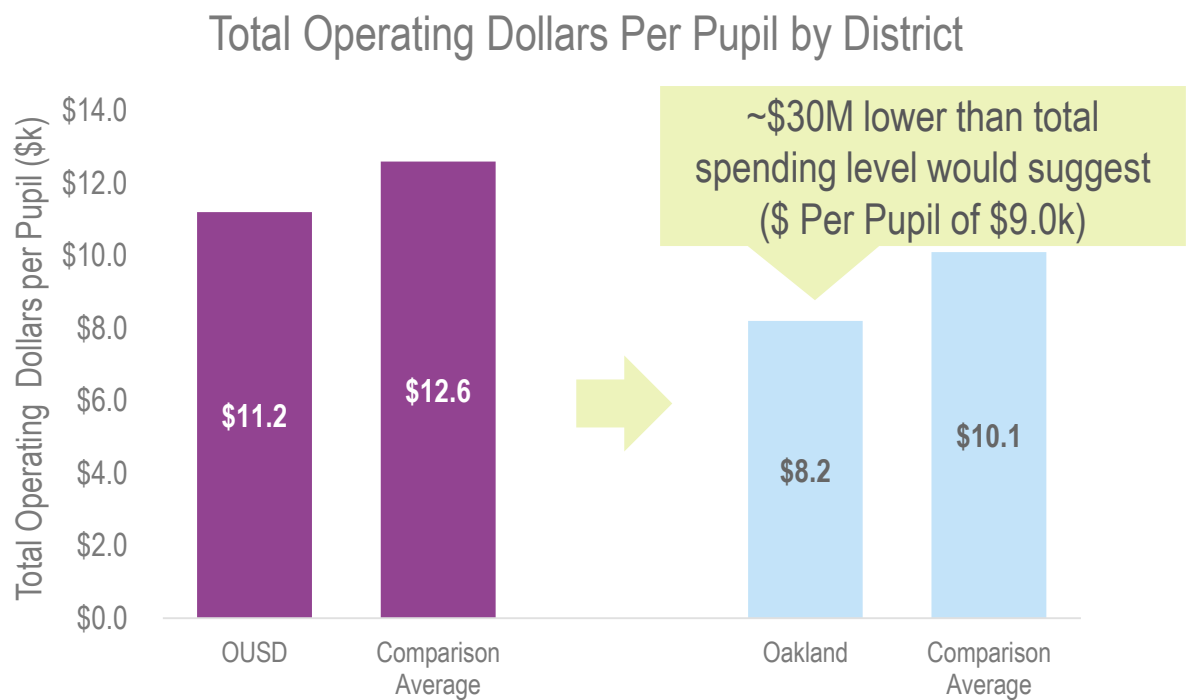| District	Value
Denver	$10.5
Austin	$10.6
Hall County, GA	$11.0
OUSD	$11.2
Prince George's County	$11.2
Baltimore	$15.8
Cleveland	$16.6

Note on use of comparison data: *Spending more or less in different areas than other districts is not inherently good or bad. Our goal is to understand how OUSD resource use is and is not aligned with effective strategy and ensure spending differences are the result of deliberate & strategic choices. Comparative analyses simply help uncover whether differences are deliberate and strategic.*

Sources: ERS Comparison Database; OUSD SY14-15 Expenditure Data. See Appendix C for more details on comparison districts.

Analysis includes both Restricted and Unrestricted expenditures

*Adjusted for Geography; Dollar estimate excludes "Untracked Budget Set-Asides" in Baltimore and Cleveland

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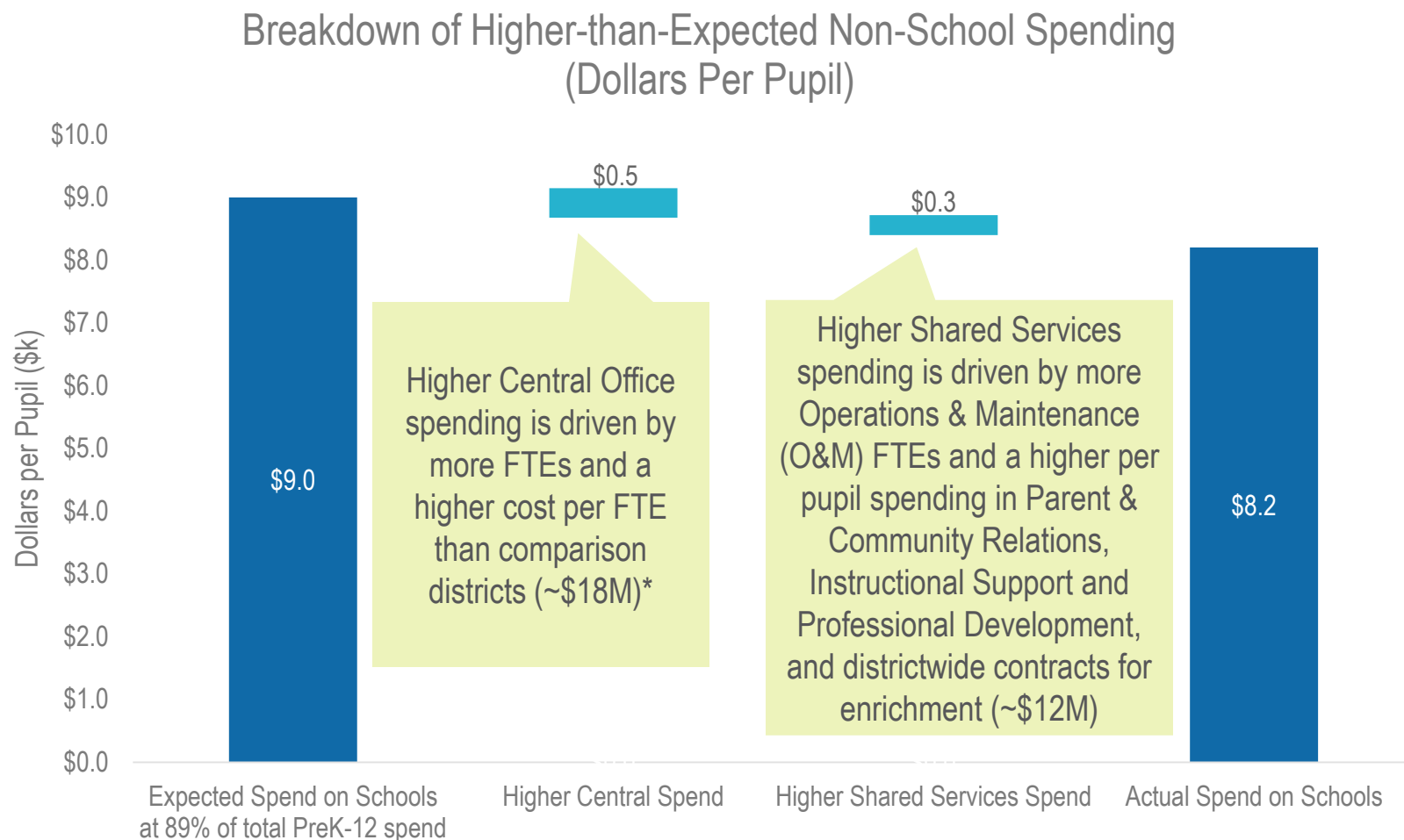# OUSD spends $30M less on schools than its overall funding level would suggest

Total Operating Dollars Per Pupil by District

~$30M lower than total spending level would suggest ($ Per Pupil of $9.0k)

Total Operating Dollars per Pupil ($k)

	OUSD	Comparison Average		Oakland	Comparison Average
	$11.2	$12.6		$8.2	$10.1

$PP	PreK-12 – Total District	School Attributed
Difference (Comparison – OUSD)	$1.4k	$1.9k
OUSD as a % of Comparisons	89%	81%

Source: ERS Comparison Database; OUSD SY14-15 Expenditure Data

See Appendix B for definition of School Attributed (the combination of "School Reported and School on Central". Appendix C for details on comparison districts.

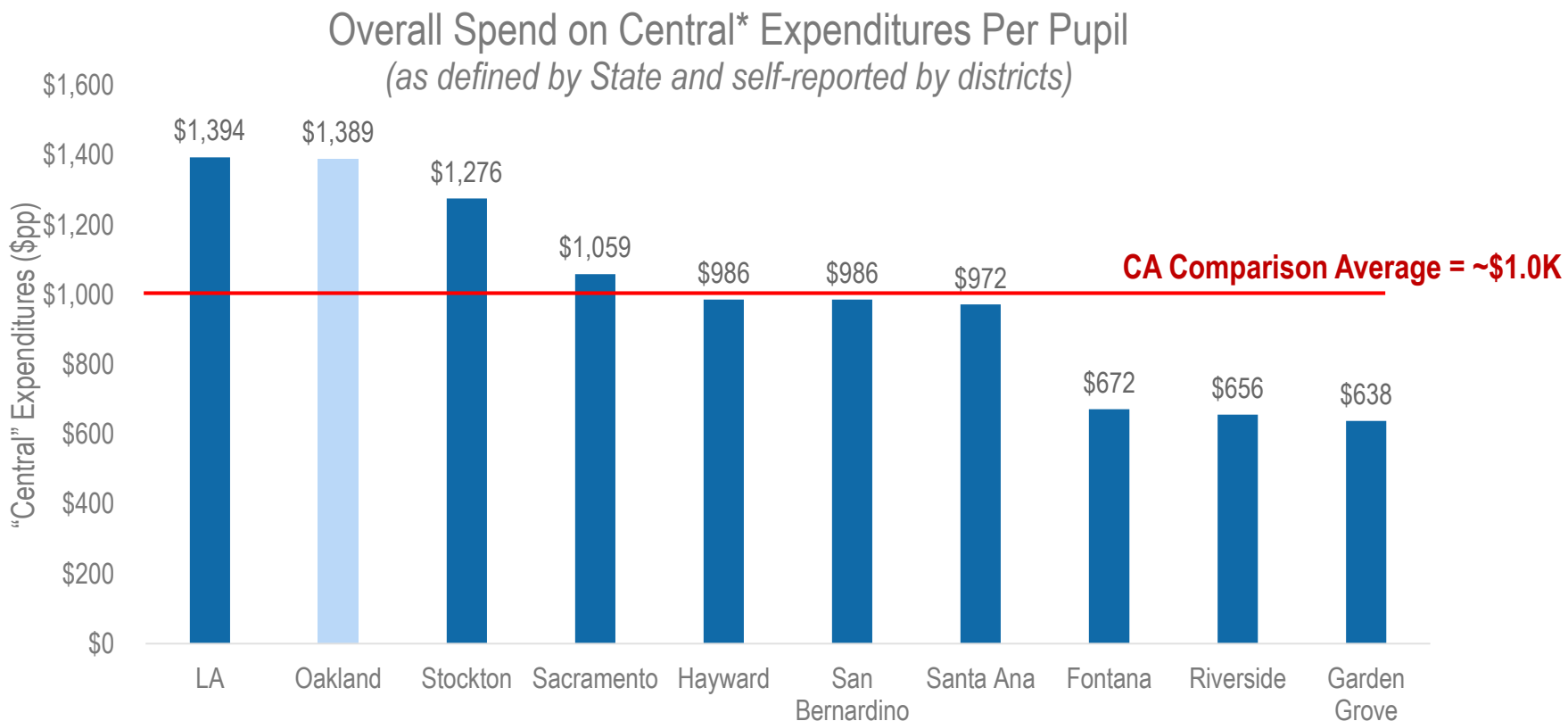**Adjusted for Geography; Dollar estimate excludes "Untracked Budget Set-Asides" in Baltimore and Cleveland*

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ERS

Lower-than-expected spending on schools can be explained by higher spending on OUSD's Central Office and Shared Services across schools

Breakdown of Higher-than-Expected Non-School Spending
(Dollars Per Pupil)

Higher Central Office spending is driven by more FTEs and a higher cost per FTE than comparison districts (~$18M)*

Higher Shared Services spending is driven by more Operations & Maintenance (O&M) FTEs and a higher per pupil spending in Parent & Community Relations, Instructional Support and Professional Development, and districtwide contracts for enrichment (~$12M)

Dollars per Pupil ($k)

$9.0 — Expected Spend on Schools at 89% of total PreK-12 spend
$0.5 — Higher Central Spend
$0.3 — Higher Shared Services Spend
$8.2 — Actual Spend on Schools

Source: OUSD SY14-15 Expenditure Data; ERS Analysis

See Appendix B for more details on Central and Shared Services Spend

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When we use state data to compare OUSD's central* spending to other CA districts, we see similarly higher-than-average spend
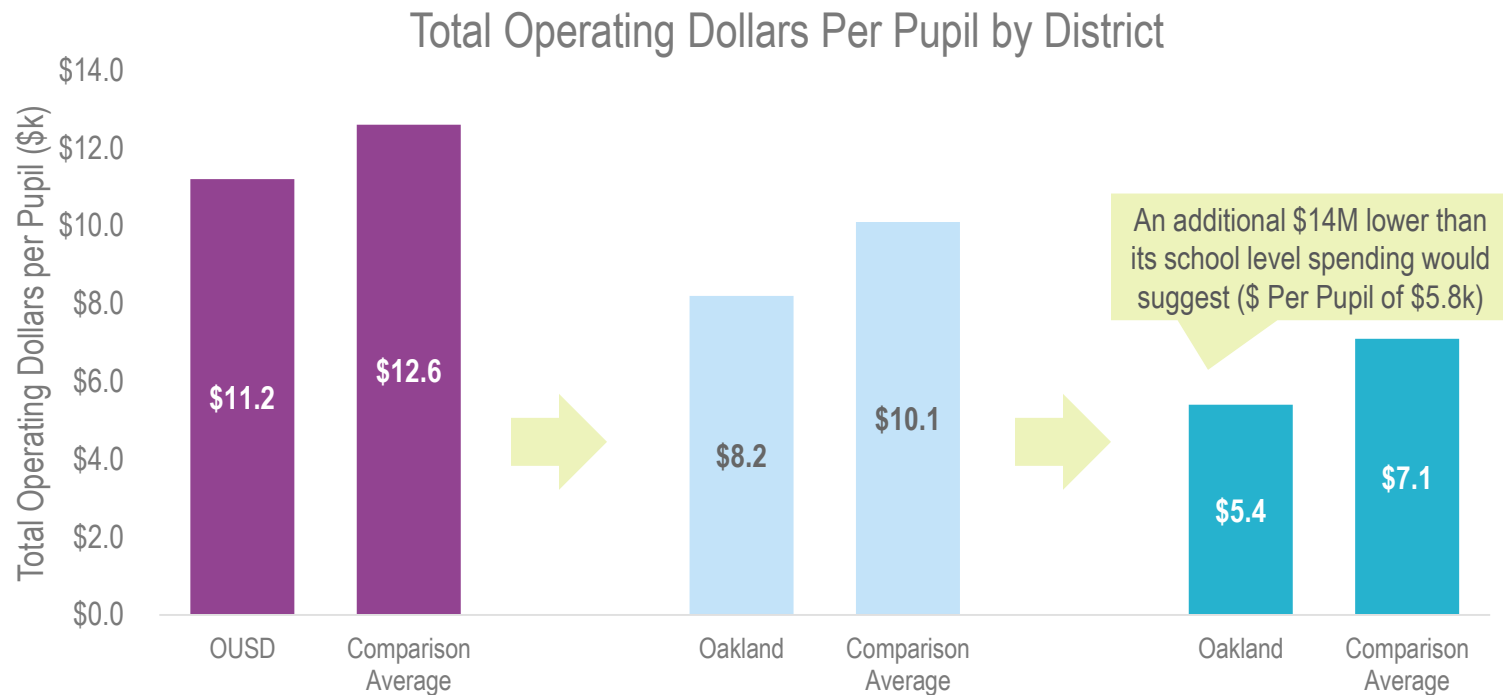
Overall Spend on Central* Expenditures Per Pupil
(as defined by State and self-reported by districts)

CA Comparison Average = ~$1.0K

	LA	Oakland	Stockton	Sacramento	Hayward	San Bernardino	Santa Ana	Fontana	Riverside	Garden Grove
Per pupil	$1,394	$1,389	$1,276	$1,059	$986	$986	$972	$672	$656	$638
Total $PP	$16,703	$13,154	$11,267	$10,604	$10,595	$11,164	$12,370	$9,158	$9,161	$12,369
% on Central	8.3%	10.6%	11.3%	8.6%	9.3%	8.8%	9.2%	7.3%	7.2%	5.2%

Source: Analysis of CDE Data, 13-14

San Francisco Unified has been excluded due to issues with data consistency

*See Appendix B for definition of "Central" expenditures

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Even after we account for higher non-school spending, OUSD spends $14M less on Instruction than its *school*-level spending would suggest

Total Operating Dollars Per Pupil by District

An additional $14M lower than its school level spending would suggest ($ Per Pupil of $5.8k)

$PP	PreK-12 – Total District		All School Level		Instruction Only
Difference (Comparison – OUSD)	$1.4k		$1.9k		$1.7k
OUSD as a % of Comparisons	89%		81%		76%

Source: ERS Comparison Database; OUSD SY14-15 Expenditure Data
See Appendix C for details on comparison districts.

*Adjusted for Geography; Dollar estimate excludes "Untracked Budget Set-Asides" in Baltimore and Cleveland

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Lower-than-expected spending on Instruction can be explained by higher spending on school-attributed *Pupil Services & Enrichment* and *Operations & Management (O&M)*

Breakdown of Higher Non-Instructional Spending at Schools
(Dollars Per Pupil)

Total instructional spend equates to ~48% of the overall total $pp

Dollars per Pupil ($k)

$5.8 — Expected Spend on Instruction at 81% of School Level Spend

$0.2 — Higher Spending on Pupil Services & Enrichment — Driven by Parent & Community Relations and contracts for Enrichment ($7M)

$0.1 — Higher Spend on O&M — Driven by more-than-expected Facilities and Maintenance and Security staff ($5M)

Higher Spend on School Leadership

Higher Spend on Instruction Support & Professional Development (ISPD)

$5.4 — Actual Spend on Instruction

Source: OUSD SY14-15 Expenditure Data; ERS Analysis
See Appendix B for details on ERS terminology.

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School Funding Levels:
How much variation is there in per-pupil spending across and within school levels? What drives the observed variation?

School Funding Levels

- *Key Questions*
  - How much variation is there in per-pupil spending across and within school levels? What drives the observed variation?
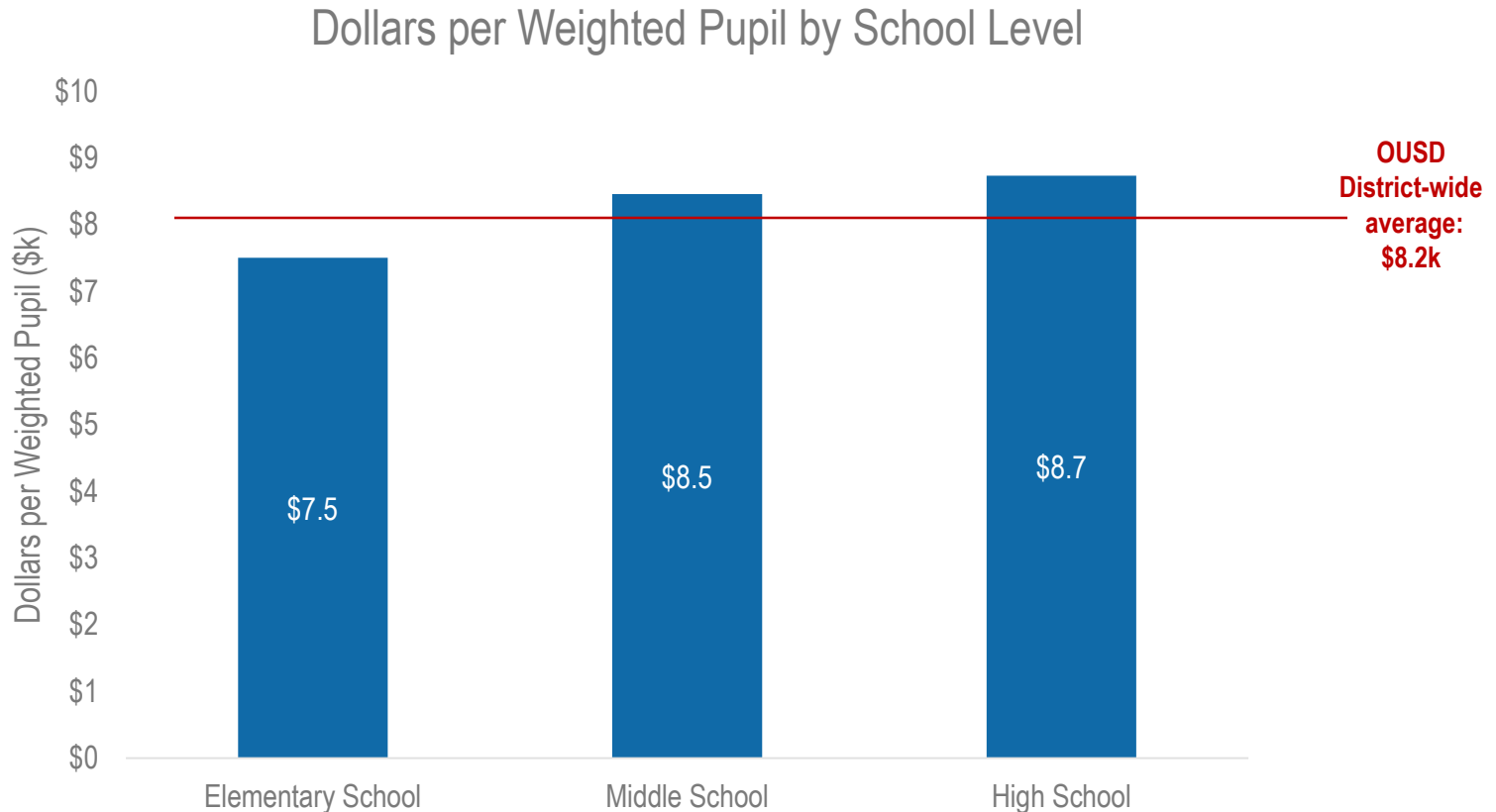
- *Summary of Analysis & Insights*
  1. OUSD spends >10% more per pupil at the HS level than ES & MS
  2. Per-pupil funding levels across middle and high schools vary greatly, even after adjusting for differences in student need across schools
     I. The variation that exists in elementary schools is related to average teacher compensation, disproportionately affecting schools with high concentrations of ELL students
     II. Middle and high schools with low-enrollment typically are higher funded

- *Action Implications*
  1. Monitor spending given shifts to the state funding policies and alignment with theory of action and student need
  2. Consider revisions to the school funding formula to address potential inequities within school levels

ERS methodology examines per-pupil spending after controlling for differences in student need levels across schools and school levels; OUSD spent more per pupil at HS & MS compared to ES
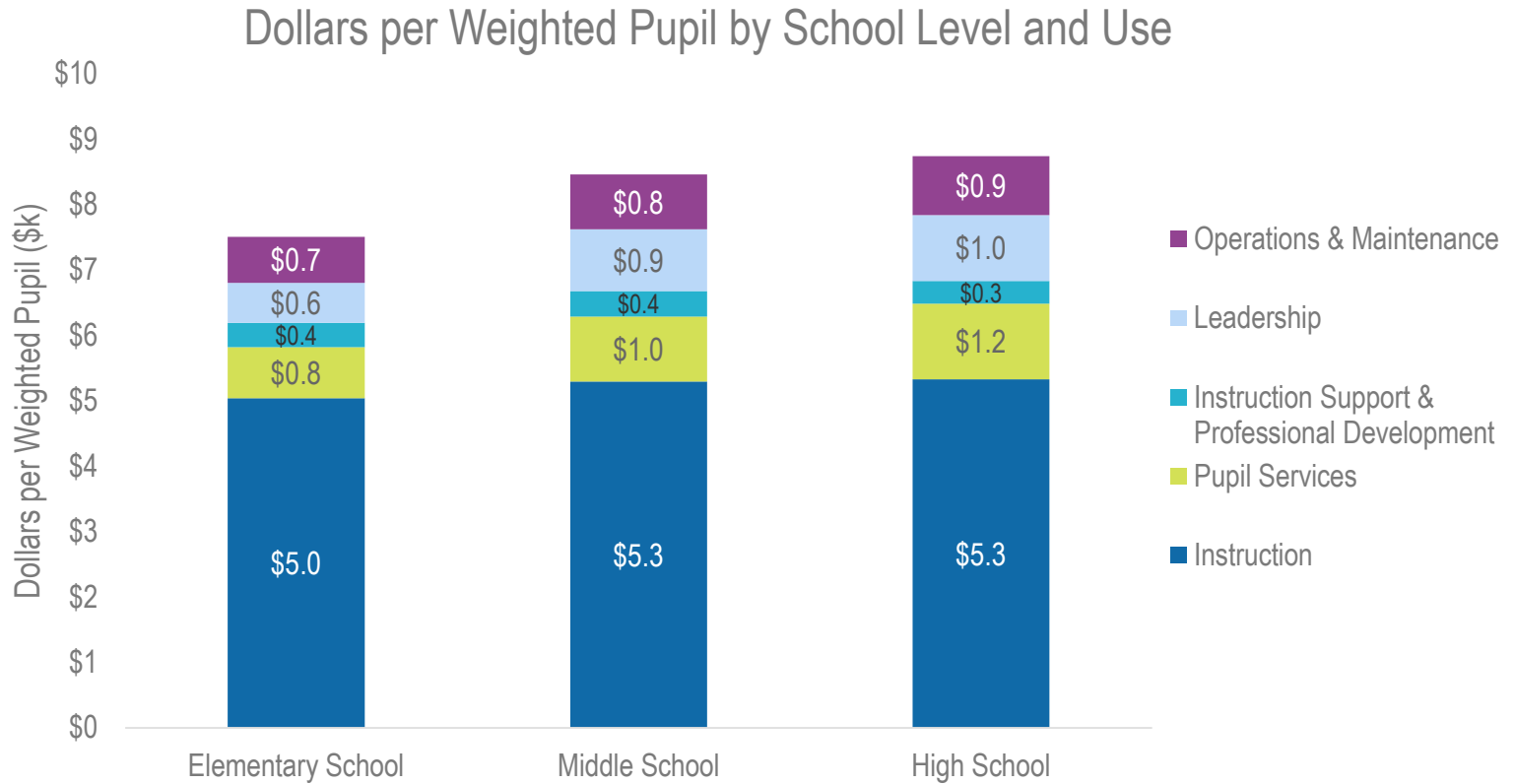
Dollars per Weighted Pupil by School Level

OUSD District-wide average: $8.2k

Y-axis: Dollars per Weighted Pupil ($k)

- Elementary School: $7.5
- Middle School: $8.5
- High School: $8.7

These spending patterns are consistent with OUSD's higher per-pupil revenue in HS and MS, though avg. ES spending has likely increased due to participation in the state class size reduction program

Note: Equity analysis is K-12 only. See Appendix C for OUSD spending by school level relative to comparison districts.
Source: OUSD SY14-15 Expenditure Data; ERS Analysis

Higher spending on MS and HS in OUSD is consistent across most ERS-defined *Use* categories
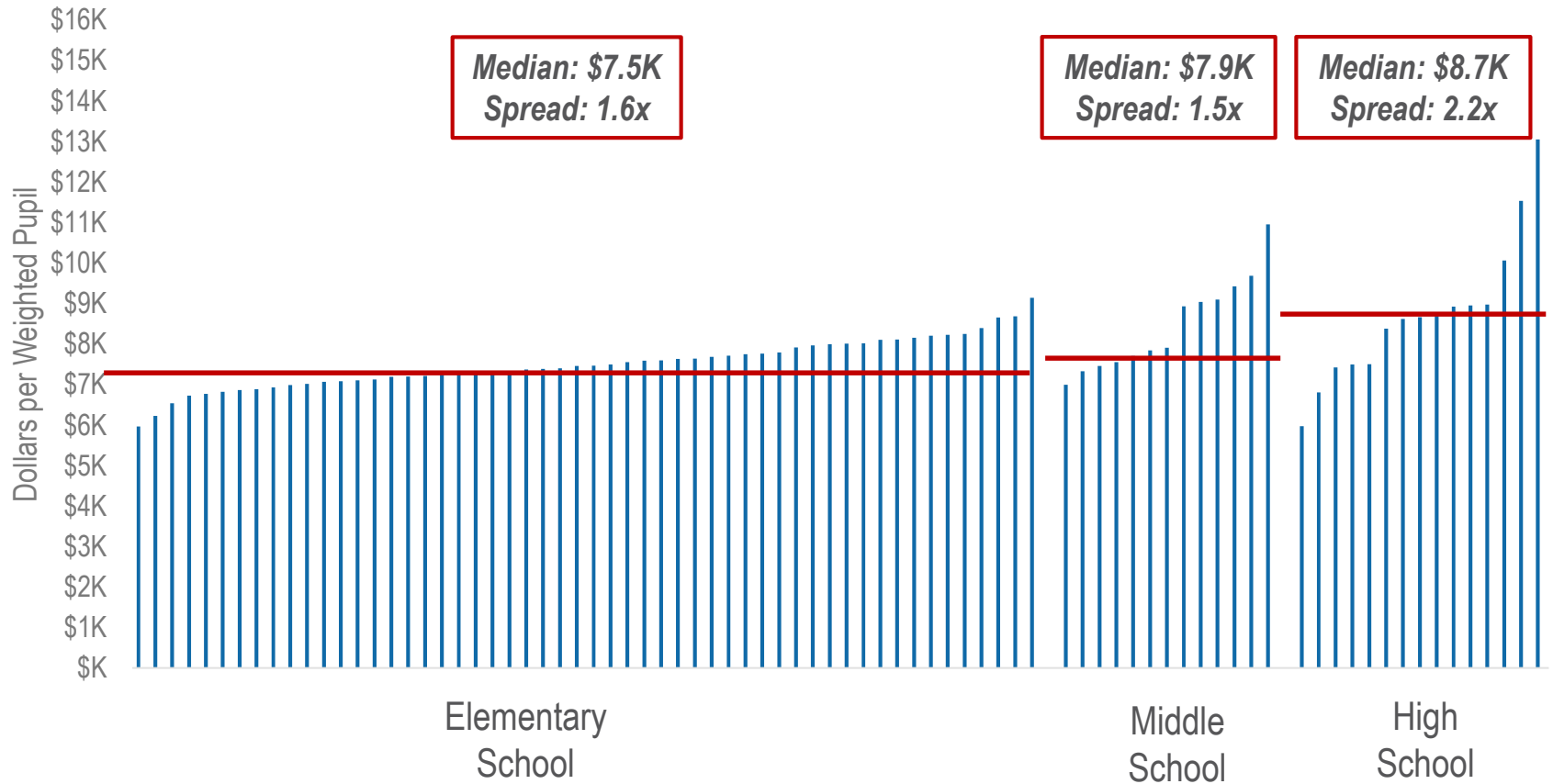

Dollars per Weighted Pupil by School Level and Use

Note: Equity analysis is K-12 only
See Appendix A for details on ERS terminology
Source: OUSD SY14-15 Expenditure Data; ERS Analysis

Within school levels, we find variation in spending across schools on a per-weighted-pupil basis
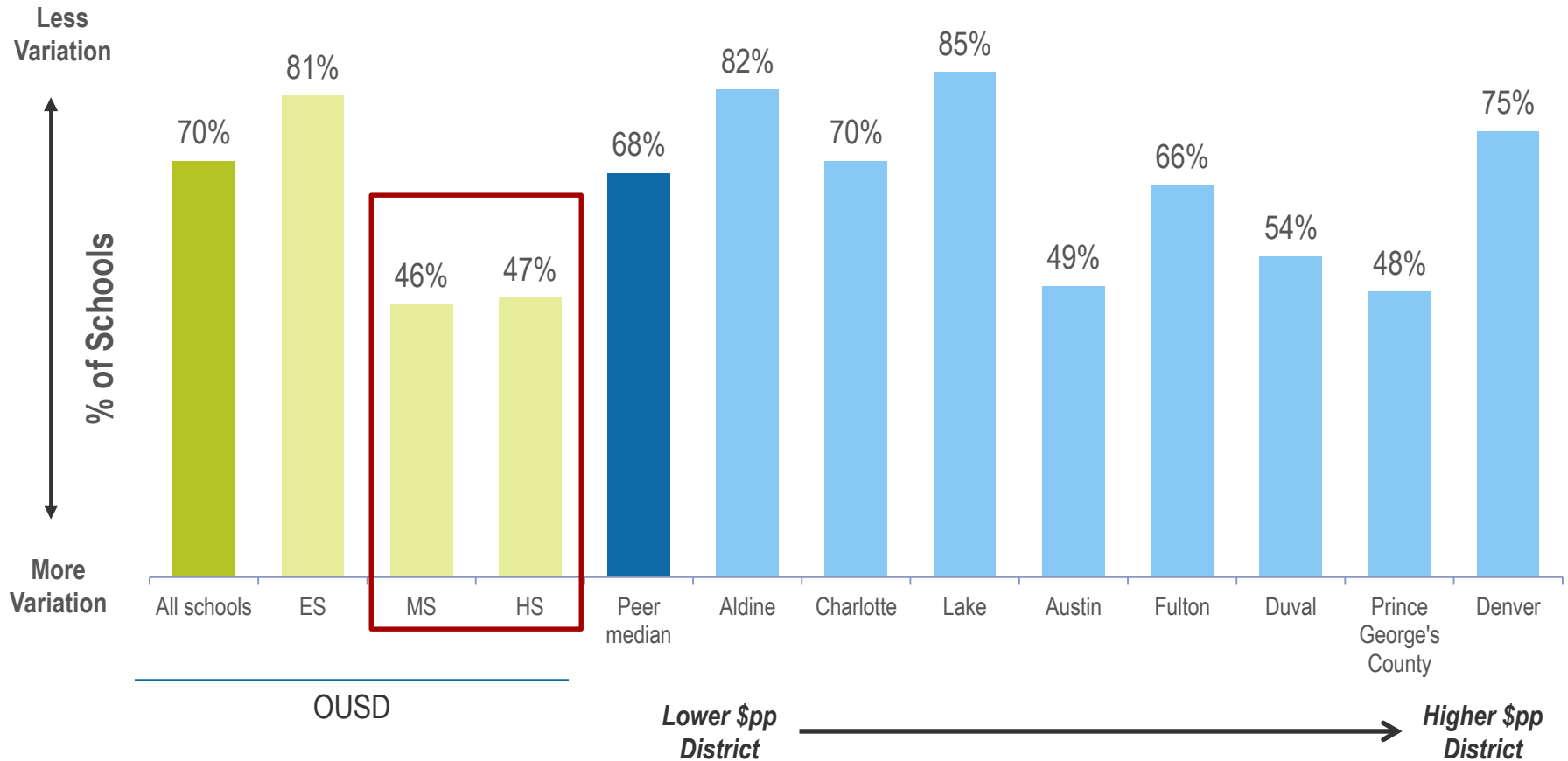
School Attributed Dollars per Weighted Pupil ($pwp)

Median: $7.5K
Spread: 1.6x

Median: $7.9K
Spread: 1.5x

Median: $8.7K
Spread: 2.2x

Dollars per Weighted Pupil

Elementary School

Middle School

High School

Note: Equity analysis is K-12 only

Source: OUSD SY14-15 Expenditure Data; ERS Analysis

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There is more variation in per-weighted-pupil spending among OUSD's MS and HS as compared to national benchmarks

Share of Schools <u>within</u> 10% of School Level Median Per Weighted Pupil Spending

Less Variation

% of Schools

More Variation

All schools	ES	MS	HS	Peer median	Aldine	Charlotte	Lake	Austin	Fulton	Duval	Prince George's County	Denver
70%	81%	46%	47%	68%	82%	70%	85%	49%	66%	54%	48%	75%

OUSD

Lower $pp District → *Higher $pp District*

Note: Equity analysis is K-12 only

Source: OUSD SY14-15 Expenditure Data; ERS Analysis; ERS Comparison Database

Much of the variation that does exist at the ES level is explained by higher average teacher compensation resulting in higher Instructional spending

ES Instruction Dollars per Weighted Pupil by Average Teacher Compensation

R^2 is a metric that reflects the correlation between two traits of schools; in this case, 44% of the variation in per pupil Instruction spending across schools is explained by differences in average teacher compensation across schools.
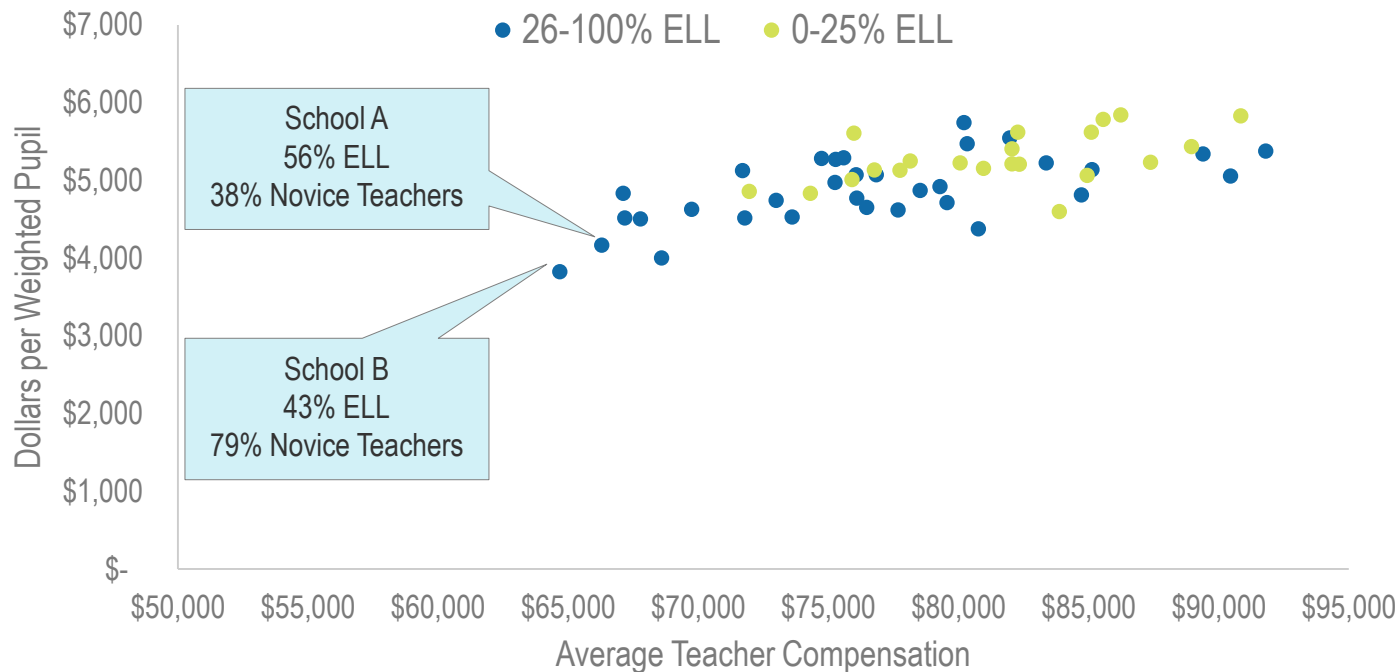
$R^2 = 0.4444$

Dollars per Weighted Pupil (y-axis): $7,000; $6,000; $5,000; $4,000; $3,000; $2,000; $1,000; $-

Average Teacher Compensation (x-axis): $50,000; $55,000; $60,000; $65,000; $70,000; $75,000; $80,000; $85,000; $90,000; $95,000

Schools in the bottom quartile for Average Teacher Comp spend $2.9M less on Instruction than the ES median

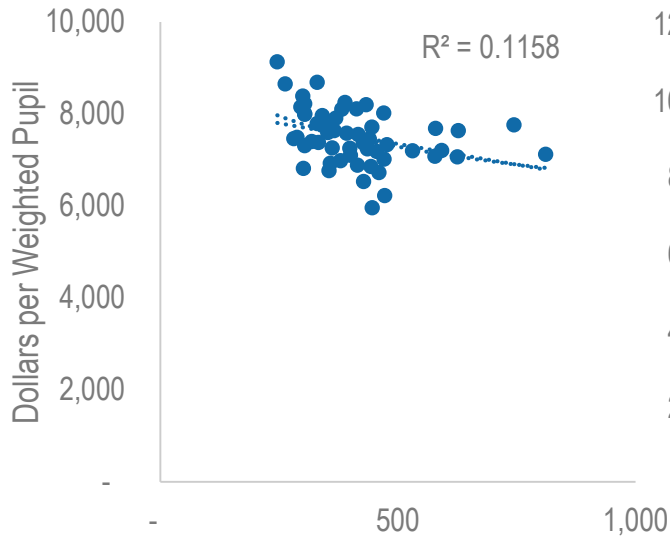*Note: Equity analysis is K-12 only*

**Novice Teachers are teachers in their first 3 years of teaching in the district*

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OUSD schools with lower average Teacher Compensation tend to have higher concentrations of ELL students

ES Instruction Dollars per Weighted Pupil
by Average Teacher Compensation

● 26-100% ELL   ● 0-25% ELL

School A
56% ELL
38% Novice Teachers

School B
43% ELL
79% Novice Teachers

Y-axis: Dollars per Weighted Pupil — $-, $1,000, $2,000, $3,000, $4,000, $5,000, $6,000, $7,000

X-axis: Average Teacher Compensation — $50,000, $55,000, $60,000, $65,000, $70,000, $75,000, $80,000, $85,000, $90,000, $95,000

Schools with more than 25% ELL students spend $7M less on Instruction

Note: Equity analysis is K-12 only

*Novice Teachers are teachers in their first 3 years of teaching in the district

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At the MS and HS levels, school size appears to drive the within-level variation in spending but not at ES

Dollars per Weighted Pupil by School Size

Elementary School — R² = 0.1158

Middle School — R² = 0.6029

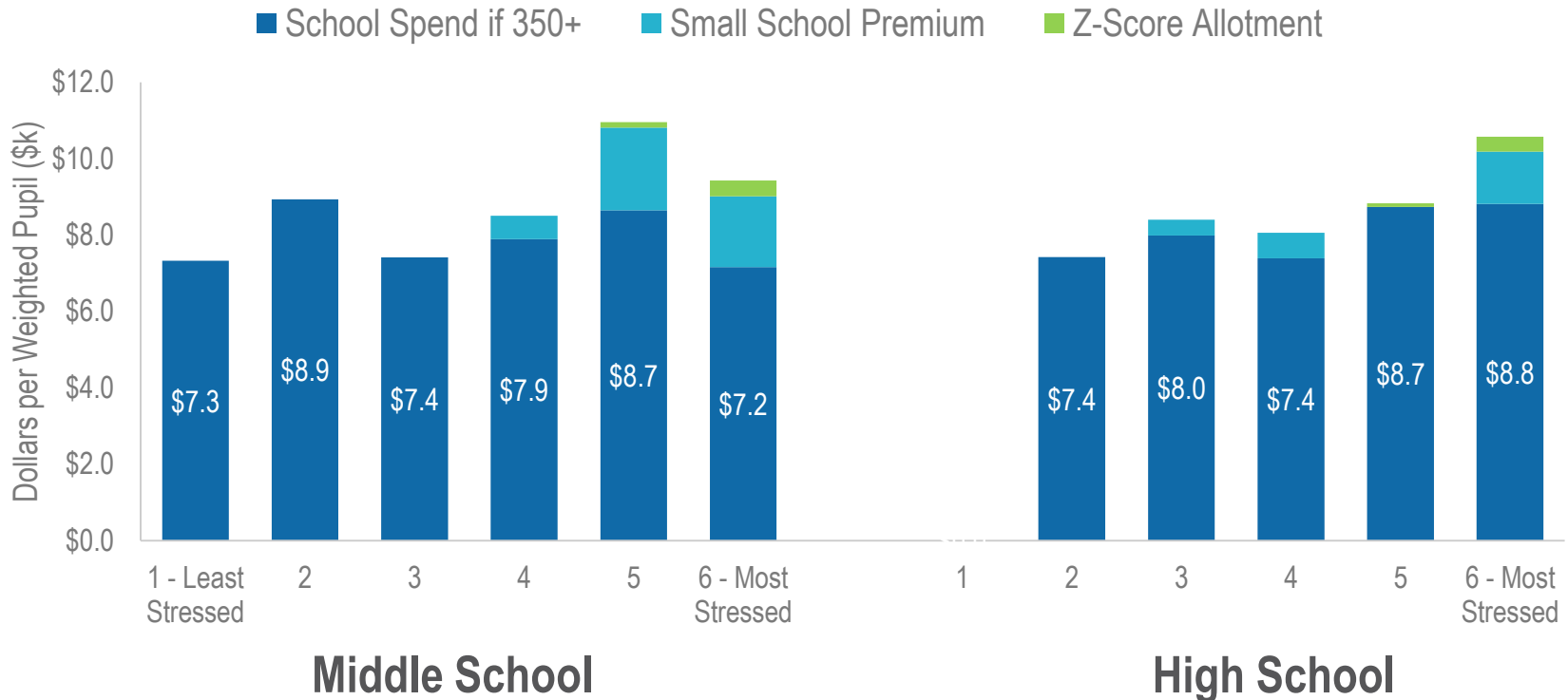High School — R² = 0.5875
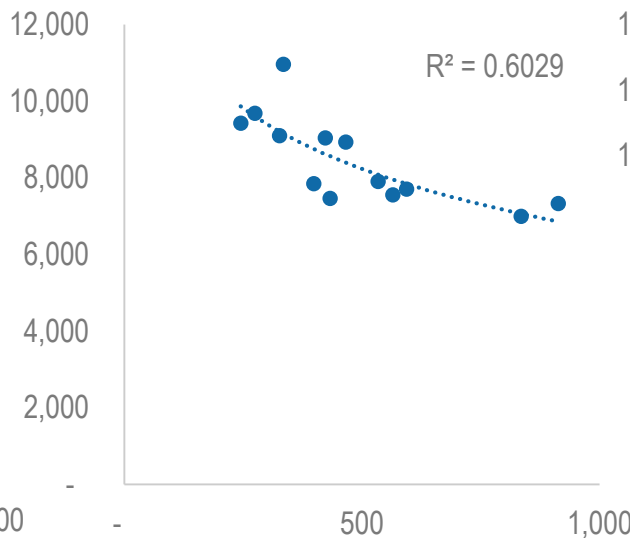
Dollars per Weighted Pupil
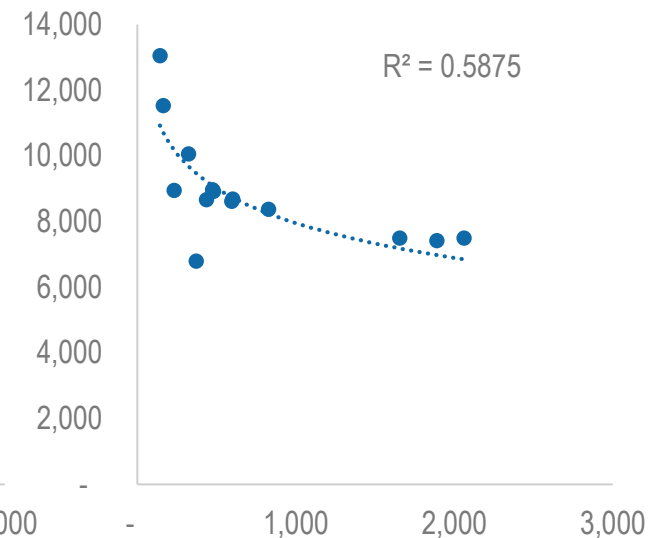
School Enrollment

Note: Equity analysis is K-12 only
Source: OUSD SY14-15 Expenditure Data; ERS Analysis

Low enrollment accounts for $3.8M in additional funding for schools in the top three stress tiers, which greatly exceeds OUSD's "Z-Score" allotment*

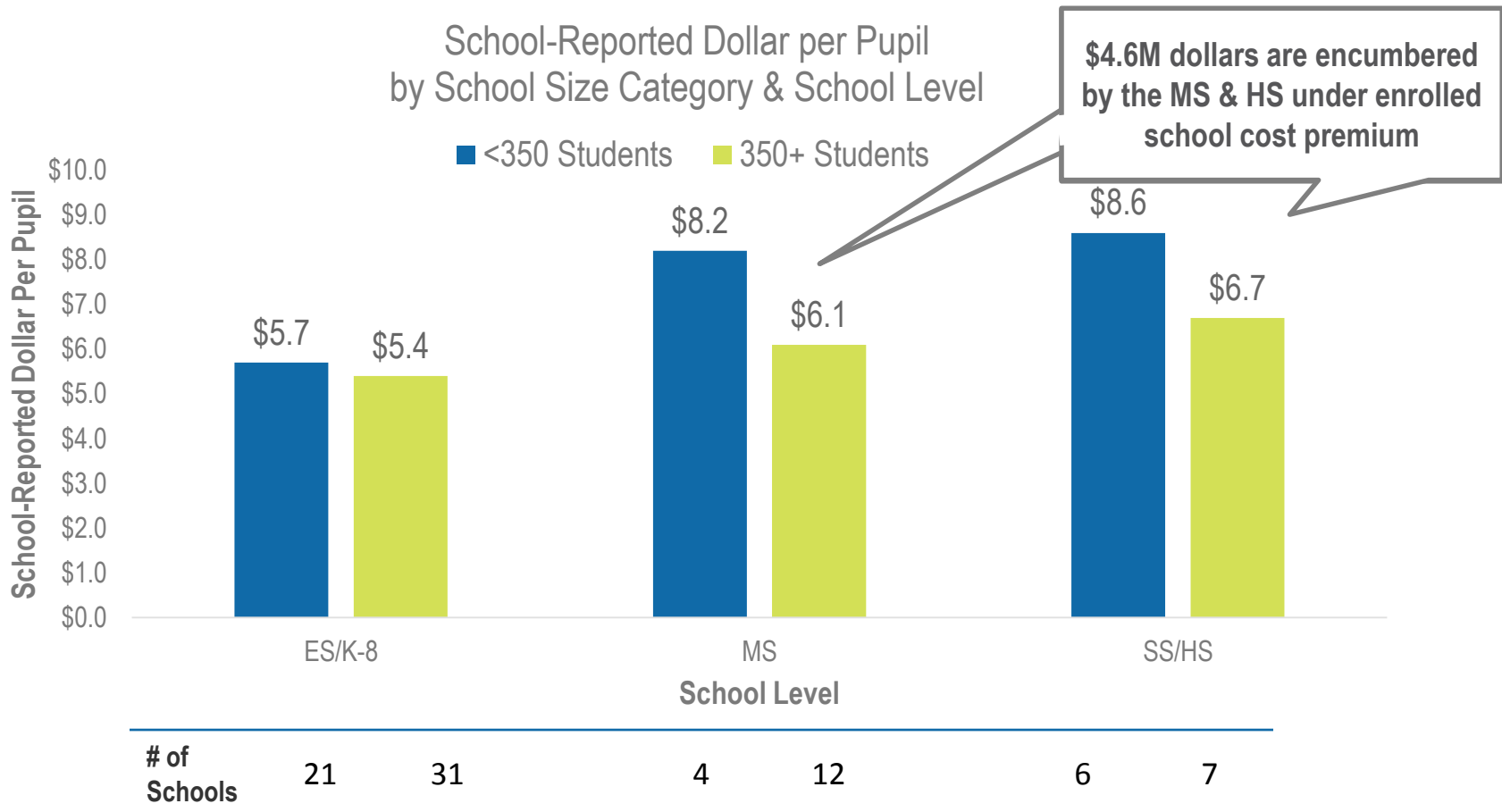## Dollars per Weighted Pupil by Environmental Stress Tiers

■ School Spend if 350+   ■ Small School Premium   ■ Z-Score Allotment

Y-axis: Dollars per Weighted Pupil ($k) — $0.0, $2.0, $4.0, $6.0, $8.0, $10.0, $12.0

Middle School — Tiers: 1 - Least Stressed, 2, 3, 4, 5, 6 - Most Stressed
Values: $7.3, $8.9, $7.4, $7.9, $8.7, $7.2

High School — Tiers: 1, 2, 3, 4, 5, 6 - Most Stressed
Values: $7.4, $8.0, $7.4, $8.7, $8.8

In SY14-15, OUSD allocated additional resources to schools with "Red" and "Dark Orange" z-scores; the funding formula has since been expanded to include "Light Orange"

Source: OUSD SY14-15 Expenditure Data; ERS Analysis; Z Score Data.

*The "Z-Score" allotment provides additional funding for schools in neighborhoods with high levels of environmental stress factors, which include violent crime, unemployment, residential vacancy, and poverty rates and is measured using 6 color-coded tiers (Red and Orange represent the highest environmental stress levels)

At an aggregate level, while low-enrollment schools at the MS and HS level spend 30-35% more per pupil than their larger peers, the total additional spend on under enrolled schools is $7M

School-Reported Dollar per Pupil
by School Size Category & School Level

■ <350 Students   ■ 350+ Students

$4.6M dollars are encumbered by the MS & HS under enrolled school cost premium

| # of Schools | 21 | 31 | 4 | 12 | 6 | 7 |

As $7M is 1.7% of OUSD's overall budget, the financial implications of the current portfolio are not as significant as the programmatic ones

Elementary School:

What choices and tradeoffs are OUSD elementary schools making given funding levels and limited time? With what impact on student experience?

Elementary School Resource Use & Design

- *Key Questions*
  - What choices and tradeoffs are OUSD elementary schools making given funding levels and limited time? With what impact on student experience?

- *Summary of Analysis & Insights*
  1. While OUSD has less instructional time than national benchmarks overall, elementary schools have even less instructional time than middle and high schools in OUSD
  2. The lack of non-core classes built into school day in many schools creates inequity and limits meaningful teacher collaboration

- *Action Implications*
  - Pursue the opportunity to increase academic time, potentially by integrating after-school services into school day for better alignment, and additional opportunities for teacher leadership and professional learning

Elementary schools are charged with preparing students for middle school and beyond…

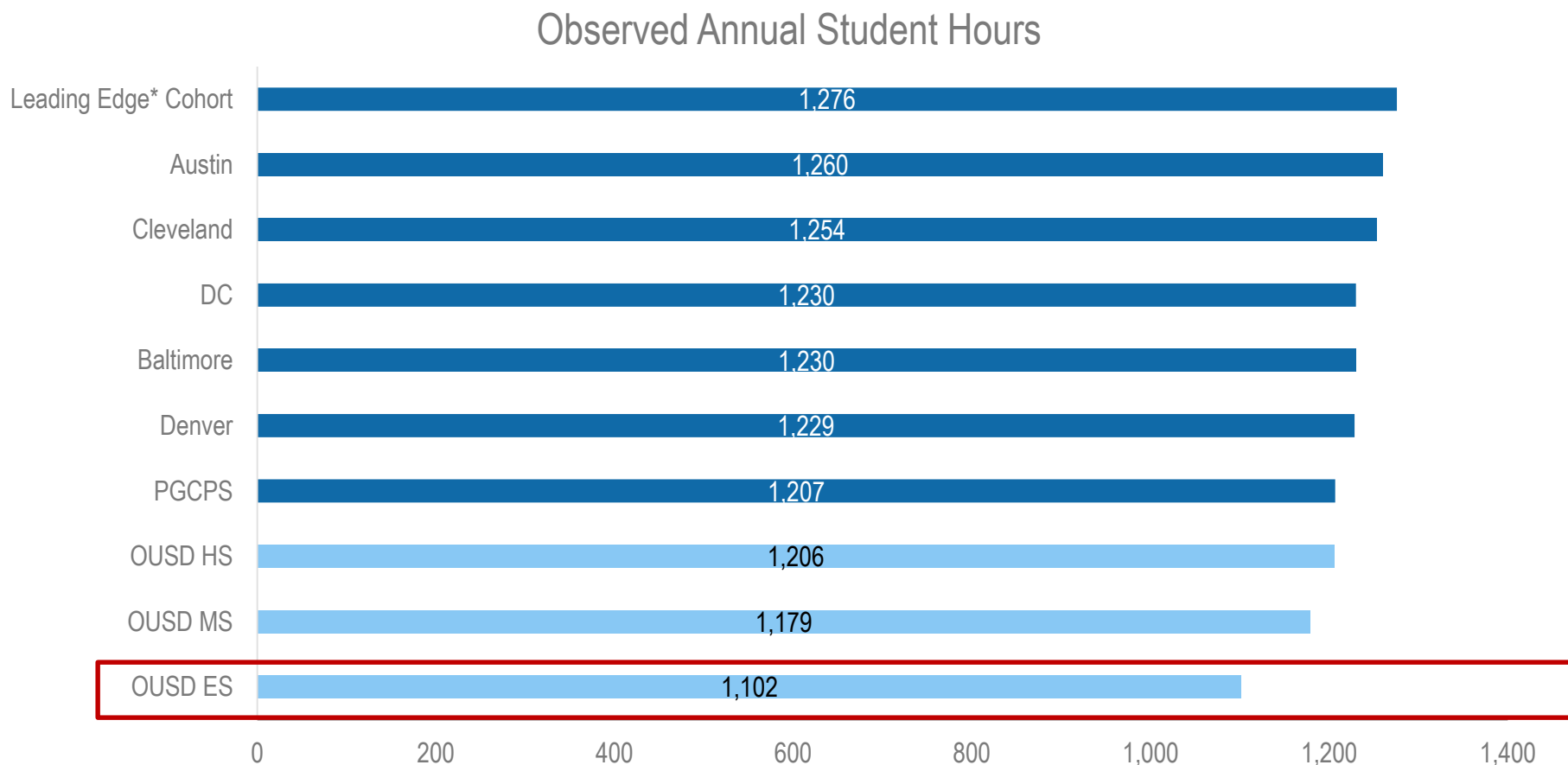### Share of OUSD 5th Grade Students by SRI Performance Band

Chart — Outgoing 5th Grade, stacked bar (bottom to top):
- Multiple Years Below Grade Level: 43%
- 1 Year Below Grade Level: 13%
- At Grade Level: 14%
- Above Grade Level: 22%
- Did Not Take: 7%

Legend:
- Did Not Take
- Above Grade Level
- At Grade Level
- 1 Year Below Grade Level
- Multiple Years Below Grade Level
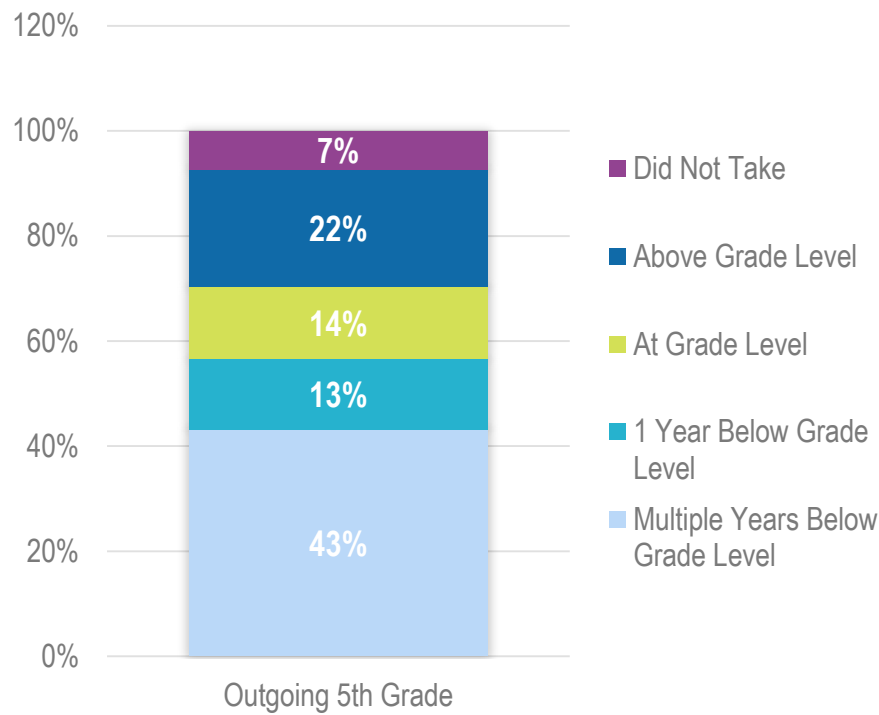
Key Statistics of Outgoing 5th Grade:

- 36% of students are at or above grade level
- Average Lexile Score: 705 (low 5th grade equivalent)
- Average Lexile Score for those "Multiple Years Below": 465 (2nd grade equivalent)

See Appendix B for Scholastic Reading Assessment Lexile Scores for Grade Level Performance. 5th grade At Grade Level range is 700-799.

Source: ERS Analysis, OUSD 2014-2015 Strategic Regional Analysis, OUSD SRI Student Performance Data from SY11-12 – SY14-15, OUSD Historical Transcripts Data

…with comparatively fewer hours to meet those goals, given the short school day
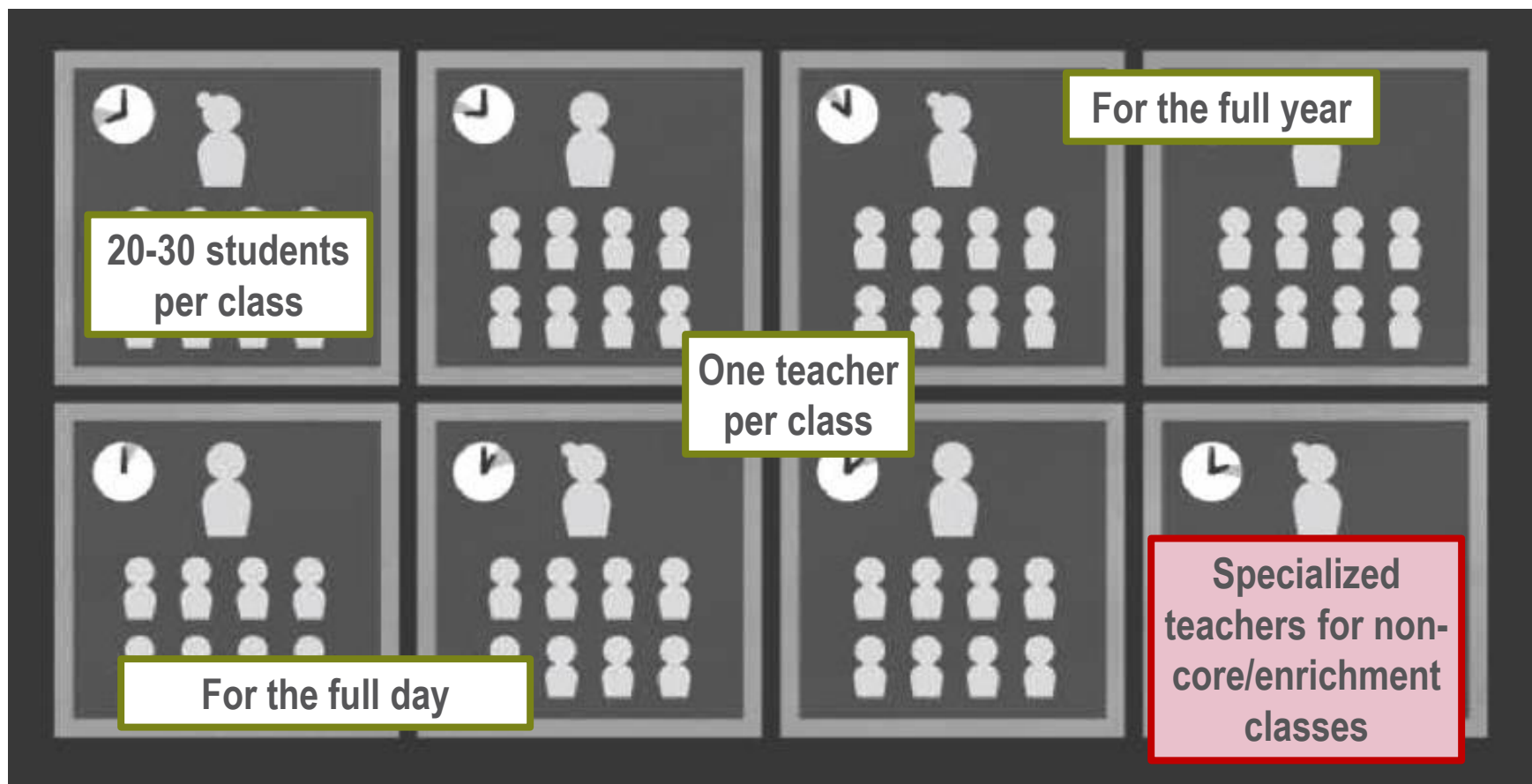
Observed Annual Student Hours

Leading Edge* Cohort	1,276
Austin	1,260
Cleveland	1,254
DC	1,230
Baltimore	1,230
Denver	1,229
PGCPS	1,207
OUSD HS	1,206
OUSD MS	1,179
OUSD ES	1,102

(x-axis: 0, 200, 400, 600, 800, 1,000, 1,200, 1,400)

Leading Edge Small Urban High Schools: https://www.erstrategies.org/library/case_studies_of_leading_edge_small_urban_high_schools

Annual student hours represent the total length of the student day multiplied by the number of school days per year (includes lunch and passing time)

Sources: ERS Comparison Database, TR3 Database, OUSD total includes minimum instructional minutes for MS & HS plus 30 min per day for passing time and lunch to compare minimum annual student hours.

Elementary schools in OUSD typically organize people, time, and money in a traditional model

For the full year

20-30 students per class

One teacher per class

For the full day

Specialized teachers for non-core/enrichment classes

…with the exception of non-core staff and support

As school leaders feel the day is too short, some schools rely on afterschool for non-core, creating the potential for inequity of student experience.

57% of ES principals felt that the current school day did not have sufficient time for students to engage in non-core/electives content.

We make the schedule work but there is never enough time to allocate to every subject matter/core content on a daily basis.

I believe the school day is too short. We have a strings class that is district funded but it interrupts instructional time for 4 & 5 grades.

I have after school time but there's no way in addition to everything else I do that I can manage it effectively.

We have an enriching and engaging After School Program.

Source: 2015 ERS OUSD Principal Survey. 75% of all principals completed survey with representation from each school level. All quotes above are from Elementary School Leaders.

Low-poverty elementary schools supplement in-district funding with a total of $4M of PTA dollars, which schools appear to spend embedding enrichment experiences and resources within the school day

School Attributed Dollars per Weighted Pupil ($pwp)
by school, organized by %FRL students

■ District Allocated $pwp   ■ Add'l PTA Revenue $pwp
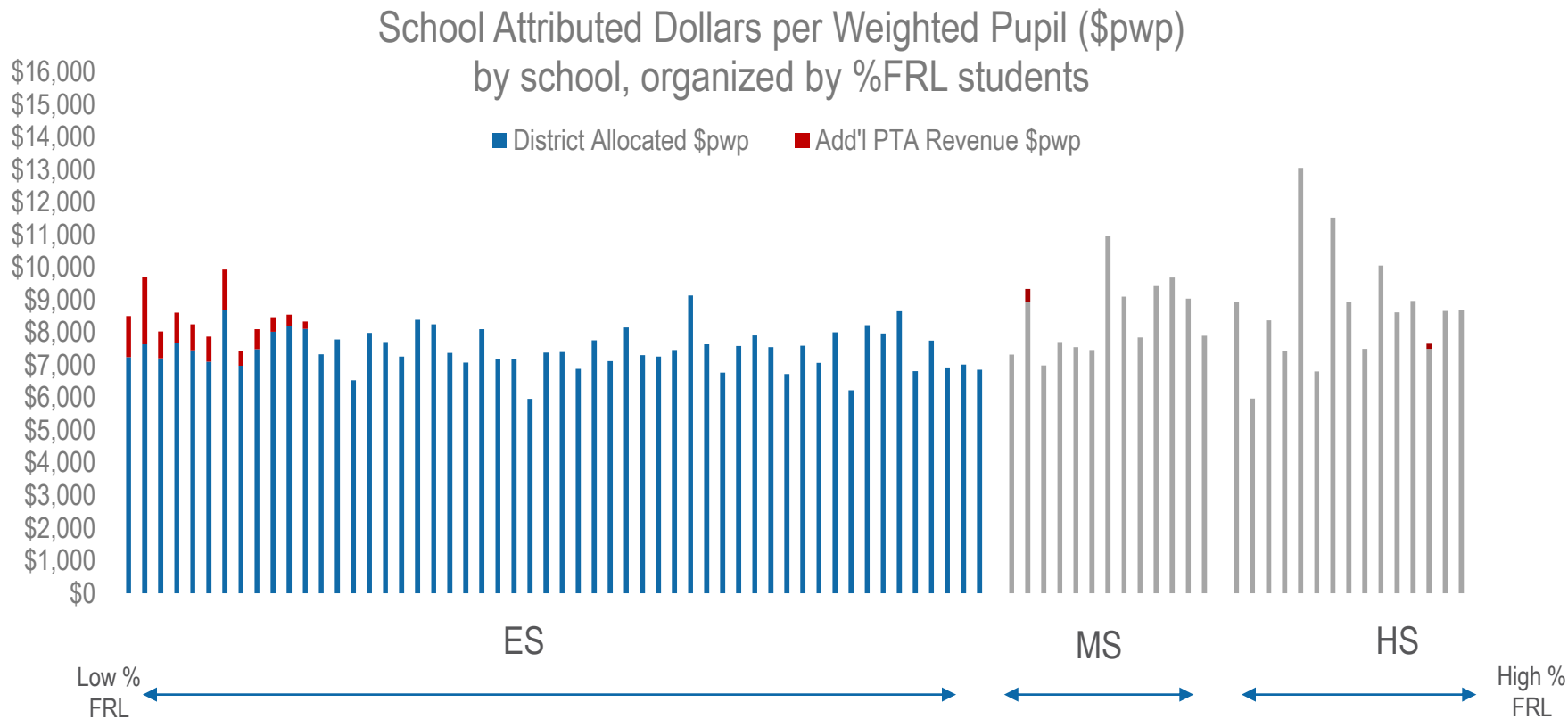
How can OUSD leverage resources to provide comparable student experience in needier schools?

Where data was available

Note: Equity analysis is K-12 only

Source: OUSD SY14-15 Expenditure Data; ERS Analysis

Additionally, external partnerships for after-school have been a cost effective way to provide important services, but certain conditions must be in place to ensure quality and coherence

Enabling Conditions		OUSD Observed Practice	Potential Barriers
Partnership **goals and performance measures that align** with specific school goals are agreed upon	🟡	Program leaders cite metrics related to the provision of the services rather than outcomes linked to school-specific goals	There is little guidance provided to school leaders on management and integration of external providers into the school community
Partner staff is **included in faculty team-building and training** to build an aligned and connected school community	🔴	There is limited overlap in the schedules of enrichment service providers and school staff	
Regular meetings with partners occur to monitor service delivery and solve problems to ensure goals are being met	🔴	Funding practices do not incentivize deep and flexible collaboration between partners and schools	Contracts are centrally held and on two-year cycles, making it difficult for schools to adjust service delivery
Other potential partner organizations are considered to ensure school is getting the maximum value and quality	🟡	Schools have the discretion to choose providers	There are not a centralized feedback loop to support schools in considering alternative providers on the basis of cost or quality

🟢 **Strategic practice observed**   🟡 **Strategic practice with barriers**   🔴 **No strategic practice observed**

OUSD may have the opportunity to improve student outcomes by extending the school day

We have to find a way to offer schools the option to provide extended day, with certificated classroom teachers - while aligning with an after school program is a good first step, often those staff members do not have the same qualifications. Extended day requires a qualified teacher who knows the students and has the skills.

…and doing so will also provide opportunities for teacher collaboration during the day

Source: 2015 ERS OUSD Principal Survey. The quote above is from an Elementary School Leader.

Middle School:

1. What is the composition of OUSD's incoming 6th grade students?

2. How are MS organizing to support instructional rigor?

Middle School Resource Use & Design

- *Key Questions*
    1. What is the composition of OUSD's incoming 6th grade students?
    2. How are MS organizing to support instructional rigor?
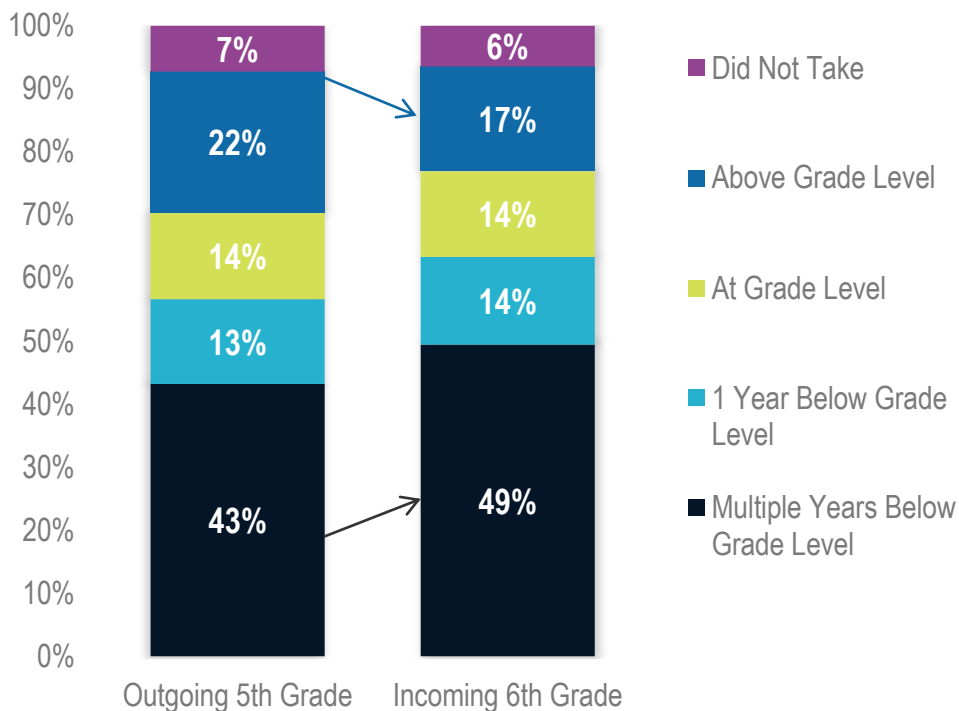
- *Summary of Analysis & Insights*
    1. Half of incoming 6th graders are reading Multiple Years Behind grade level expectations (2nd grade average).
    2. Between 5th and 6th grade, students who are Above Grade Level are 2.2x as likely to leave OUSD than their classmates who are Multiple Years Behind
    3. The relationship between student grades and SBAC scores varies widely across schools, suggesting differences in rigor and/or curricular alignment across schools

- *Action Implications*
    1. The shift in need between 5th and 6th creates opportunity to create portfolio of middle grade options that can accelerate students entering MS far behind and meet the needs of students entering at or above grade level
    2. Explore the use of grading equity as tool for deepening instructional rigor across MS & highlighting internal best-practices
    3. Revisit contractual agreements to ensure schools have flexibility to create teacher schedules that support effective teaming & collaboration practices

OUSD middle schools must organize resources strategically to meet the academic needs of their incoming students

Share of OUSD incoming 6th Grade Students by SRI Performance Band

Chart: Share of OUSD incoming 6th Grade Students by SRI Performance Band

Outgoing 5th Grade:
- Did Not Take: 7%
- Above Grade Level: 22%
- At Grade Level: 14%
- 1 Year Below Grade Level: 13%
- Multiple Years Below Grade Level: 43%

Incoming 6th Grade:
- Did Not Take: 6%
- Above Grade Level: 17%
- At Grade Level: 14%
- 1 Year Below Grade Level: 14%
- Multiple Years Below Grade Level: 49%

Key Statistics of Incoming 6th Graders:

- 31% of students are at or above grade level
- Average Lexile Score: 660 (mid-4th grade equivalent)
- Average Lexile Score for those "Multiple Years Below": 458 (2nd grade equivalent)

See Appendix B for Scholastic Reading Assessment Lexile Scores for Grade Level Performance. 6th grade At Grade Level range is 800-899.

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Between 5th and 6th grade, students who are above grade level are 2.2x as likely to leave OUSD than their classmates who are multiple years behind, impacting the overall MS performance challenge

OUSD loses its largest share of students in the 5th to 6th grade transition compared to any other K12 years
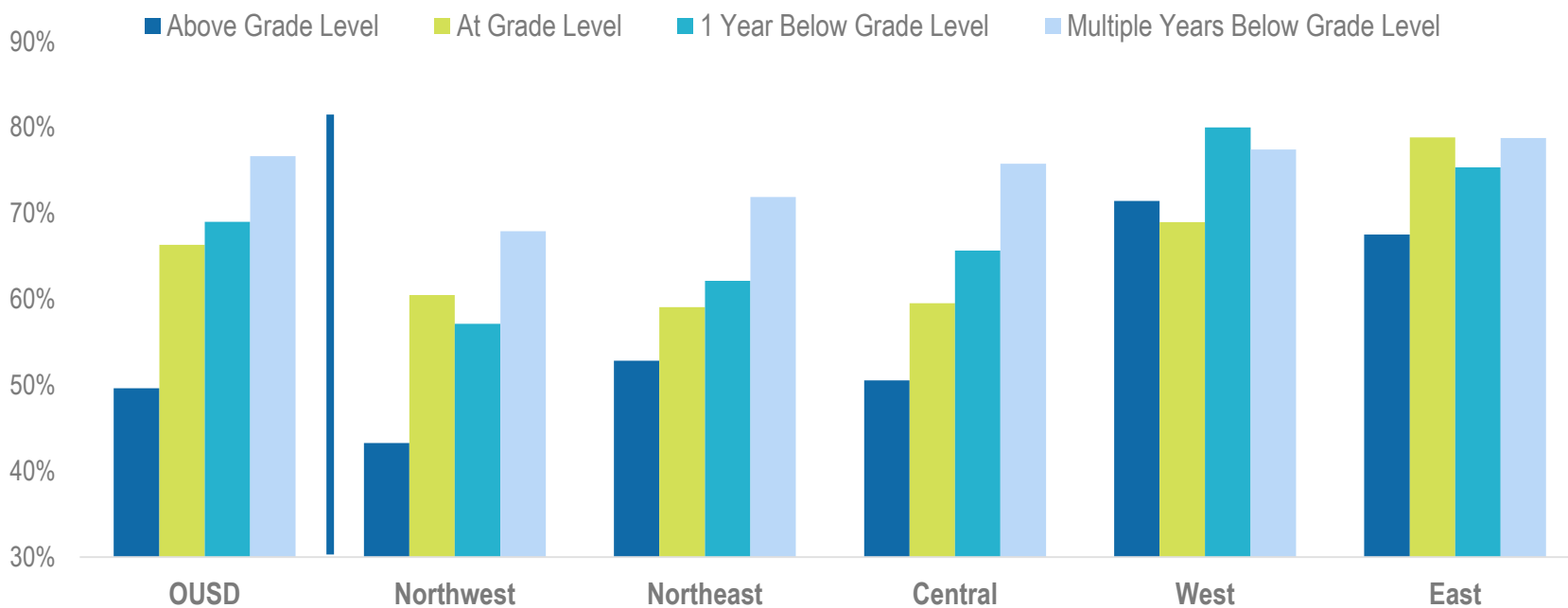
PEC Status	SRI Performance Band	2-YR Avg. % of Students Staying in OUSD from 5th → 6th	
Not Identified	Above Grade Level	50%	
	At Grade Level	66%	
	1 Year Below	69%	
	Multiple Years Below	77%	
SWD – All performance levels		77%	

Note: Within each performance bands, white students are consistently most likely to leave OUSD. For example, for Above Grade Level students, 37% of White students are retained compared to 45%-66% for all other ethnicities.

Source: ERS Analysis, OUSD 2014-2015 Strategic Regional Analysis, OUSD SRI Student Performance Data from SY11-12 – SY14-15, OUSD Historical Transcripts Data

While *Above Grade Level* students are more likely to leave in all regions of the city, exit rates are greatest in the Northwest

% of Students Retained by Region and Performance

Legend:
- Above Grade Level
- At Grade Level
- 1 Year Below Grade Level
- Multiple Years Below Grade Level

% Retained	67%	50%	63%	66%	76%	77%
	OUSD	Northwest	Northeast	Central	West	East

Source: ERS Analysis, OUSD 2014-2015 Strategic Regional Analysis, OUSD SRI Student Performance Data from SY11-12 – SY14-15, OUSD Historical Transcripts Data

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Recognizing this need, some schools provide additional time in core to catch students up

Spotlight:
Urban Promise

Teachers: 17

Students: 325

Average Class Size: 23

Average Teacher Load (Core): 87

% of Teachers cross core content: 35%

Teacher Utilization: 83%

- Morning BOOST program: 40 minutes of 10:1 instruction 4 days a week (1 day for prep)

Subject	Sections
English	6
Reading	3
Math	6
STEM (optional)	1

- Reading pull out for 20 minutes/day

- Revamped master schedule to make BOOST feasible within contractual time (by shortening other periods)

- Adult culture: Teamwork and willingness of staff. *"We are a school that runs on extended contracts"*

Middle schools are onboarding the highest concentration of novice teachers

% Novice Teachers (Core Subjects)

District Average = 35%
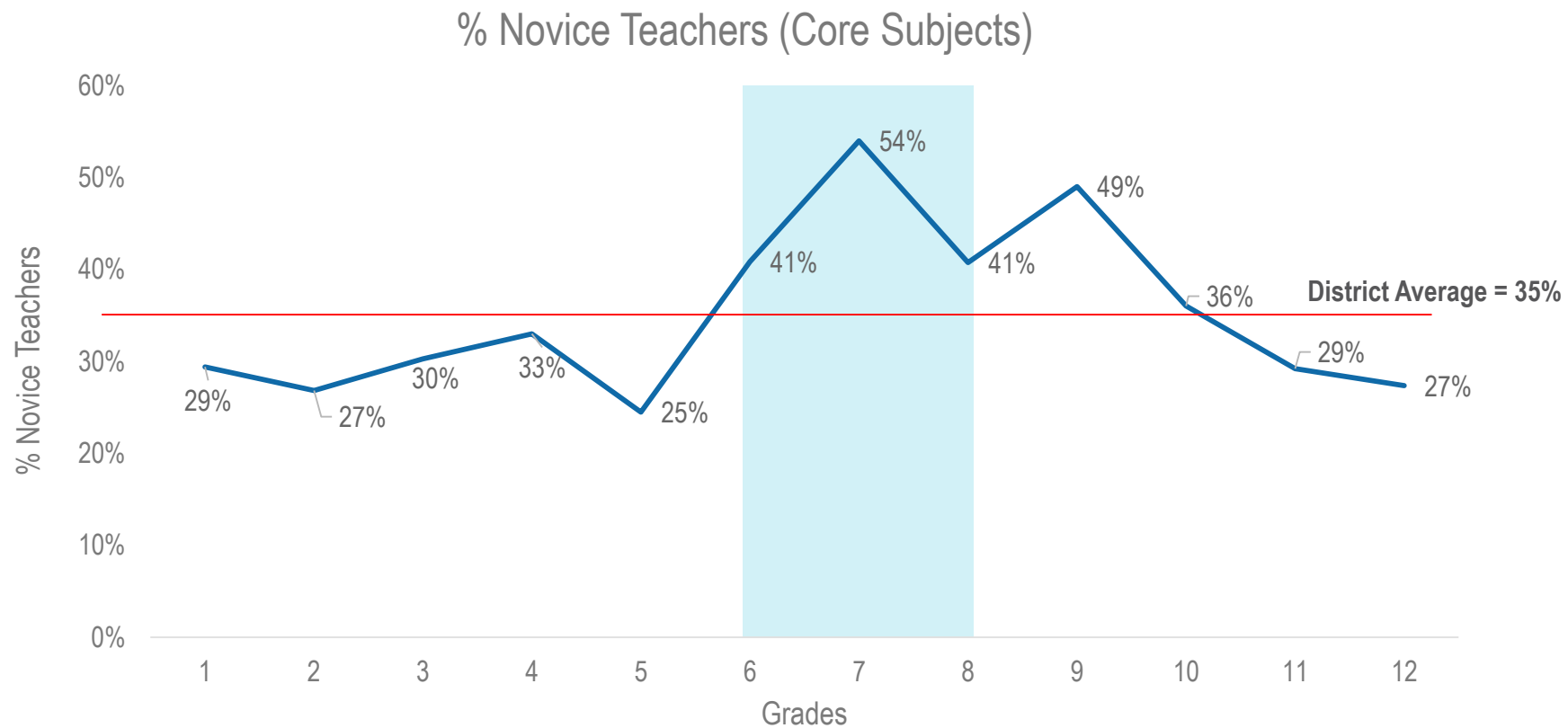
Source: OUSD 2014-2015 Course Schedule Data from AERIES, Teacher Experience Data, ERS Analysis

Within this context, OUSD teachers have relatively less time to prepare for the array of content they are teaching

Average MS Teacher Release Time as % of Student Instructional Day
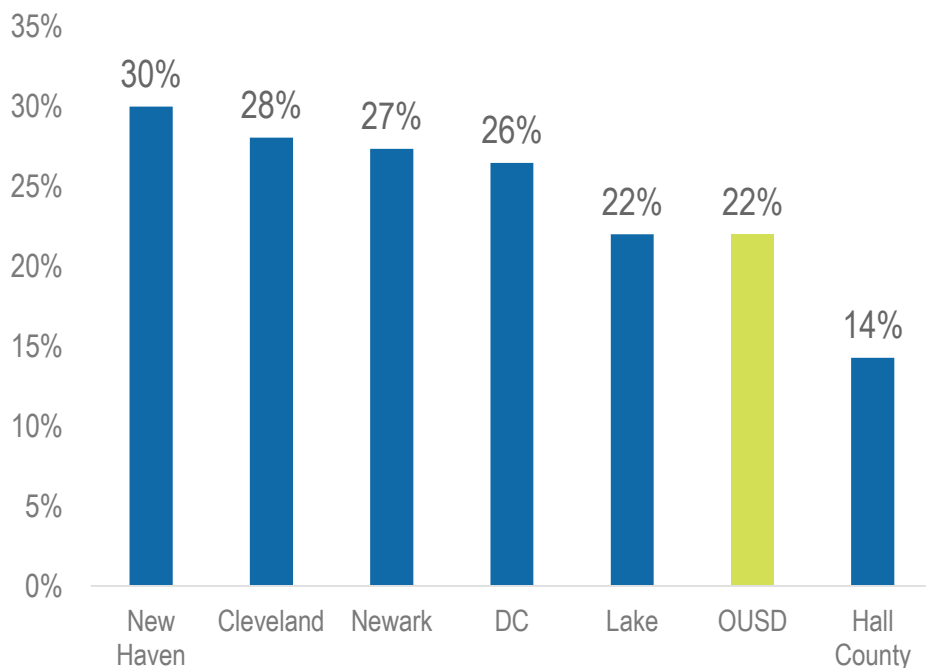
Due to OUSD limitations on daily contacts*, schools typically use a 6 period day, where teachers teach 5 periods.

Note: Release time includes non-instructional and/or supervisory duties. Comparison district averages are for all of "secondary school" – grades 6-12. OUSD average release time of 22% includes under scheduled teachers with an average of 4/6 periods, despite typical release of 17%.

Source: OUSD 2014-2015 Course Schedule Data from AERIES; ERS Comparison Database, OEA Contact.

*See Appendix C for OEA/OUSD Contract Agreement 2012-2013 Language
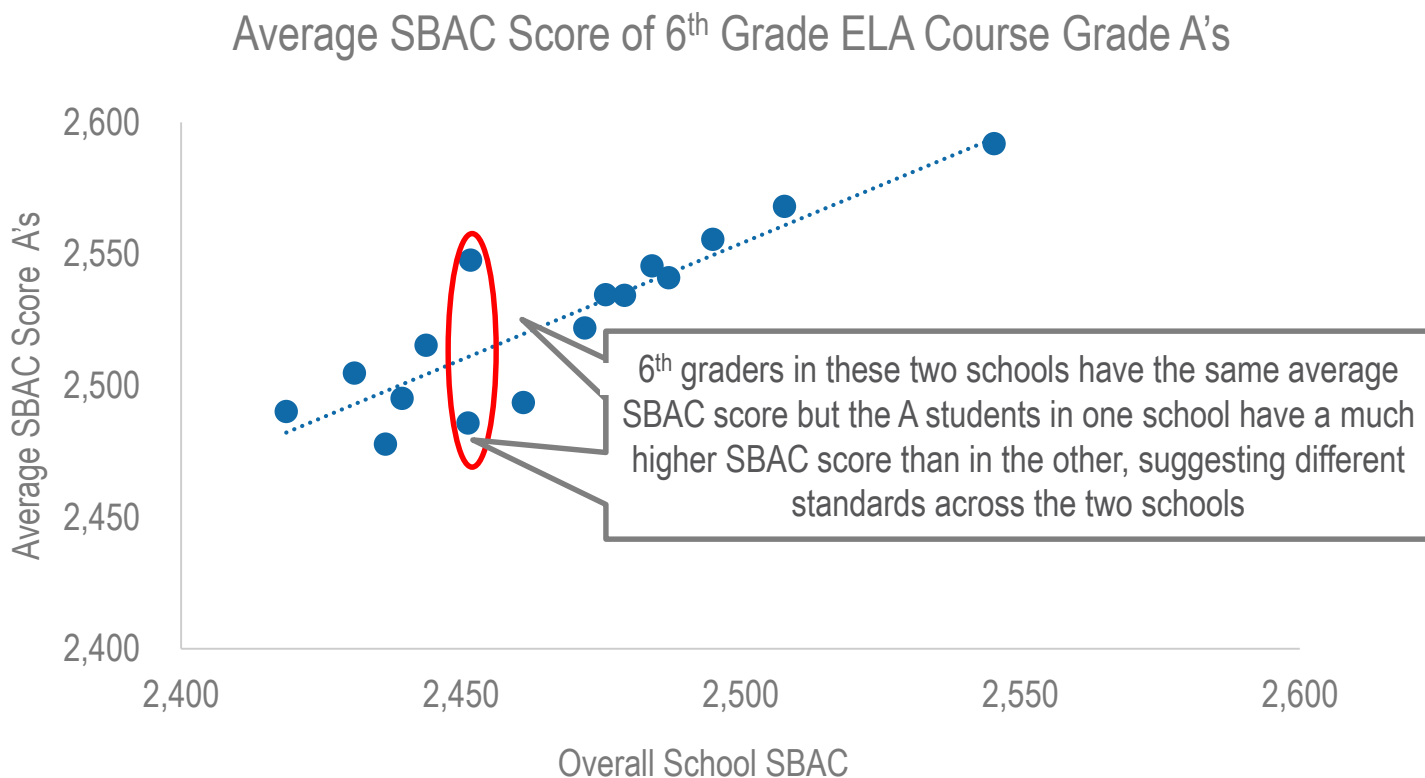
46

Across middle schools, the degree of alignment between student course grades and SBAC scores varies significantly

Average 6th Grade ELA SBAC Score by Letter Grade & School
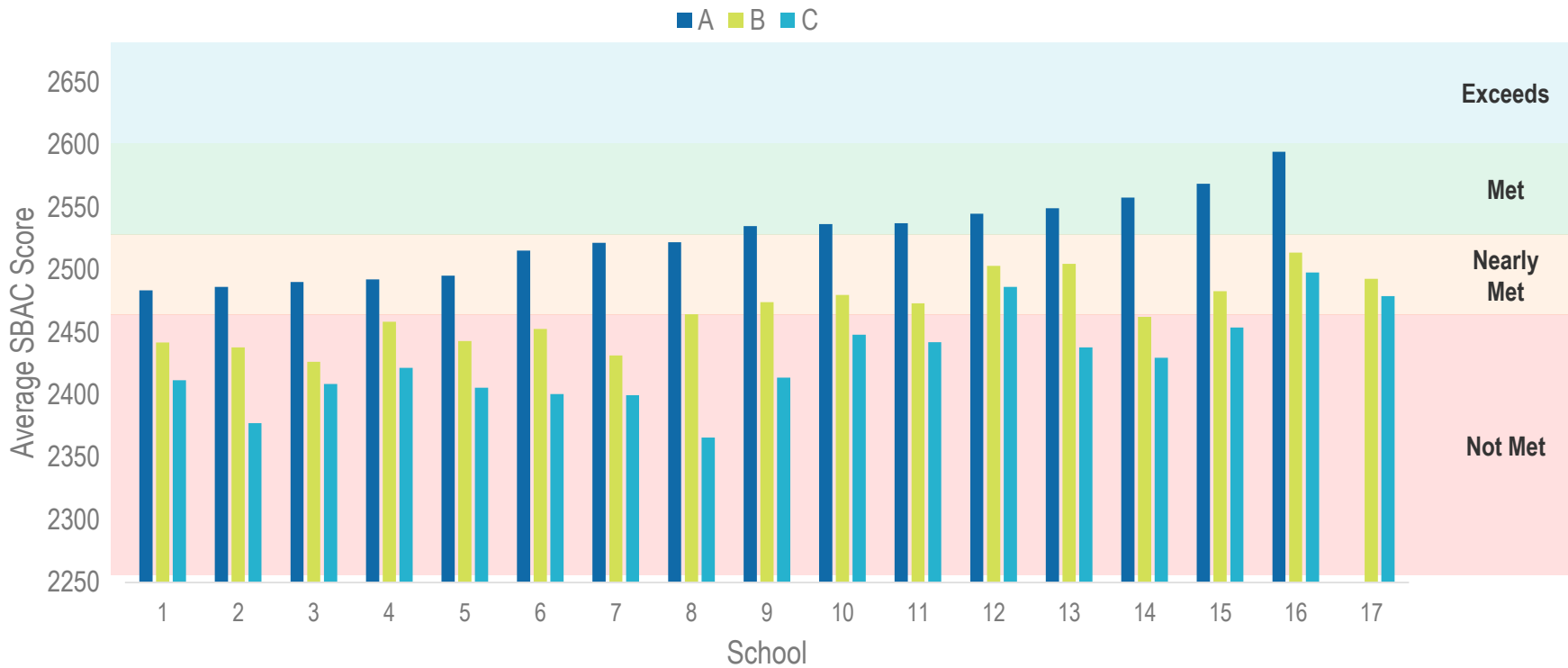
Note: This data represents a one year trend, given SBAC data availability. Over time, this metric may be used to understand whether OUSD expectations match Common Core Aligned Standards. Grades D and below are excluded from this visual representation. See Appendix 5 for school and grade level ELA course grade to SBAC scores. Grading averages on SBAC did not seem to correlate to % FRL, % Novice, or % ELL.

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This variation in the alignment of course grades to SBAC scores is related to a school's overall standardized performance

Average SBAC Score of 6th Grade ELA Course Grade A's

6th graders in these two schools have the same average SBAC score but the A students in one school have a much higher SBAC score than in the other, suggesting different standards across the two schools

Note: This data represents a one year trend, given SBAC data availability. Over time, this metric may be used to understand whether OUSD expectations match Common Core Aligned Standards. Grades D and below are excluded from this visual representation.

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High School:
To what extent do schools create master schedules and course offerings to enable students to graduate college- and career-ready in four years?

High School Resource Use & Design

- *Key Question*
  - To what extent do schools create master schedules and course offerings to enable students to graduate college- and career-ready in four years?
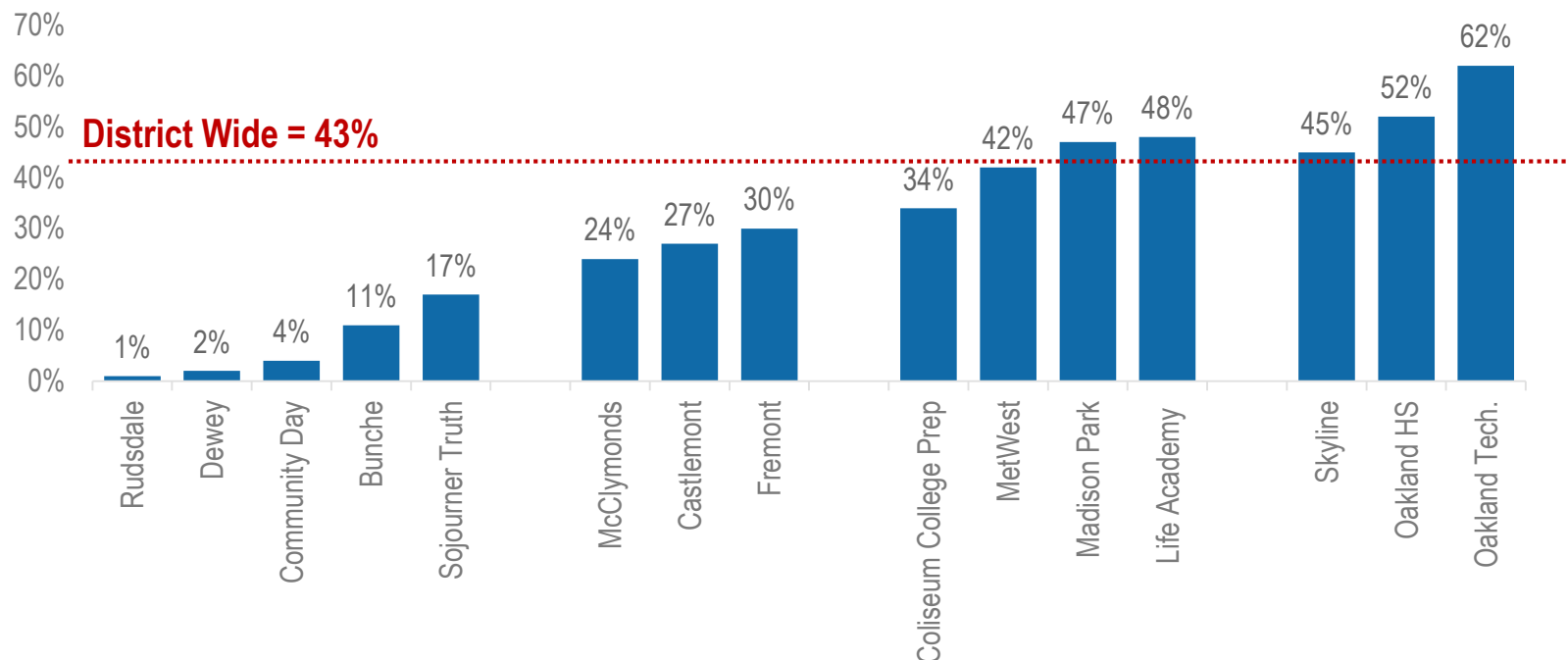
- *Summary of Analysis & Insights*
  - 54% of all high schools, serving 42% of HS students, in SY1415 would enable a "typical student" to graduate with the requisite A-G aligned credits in 4 years given the HS master schedule structures, policy, contractual agreements and the short school day

- *Action Implications*
  1. HS master schedule implementation support to increase A-G course-taking while also improving quality of instruction (despite fewer total minutes/course in the short term)
  2. Revisit contractual agreements to ensure schools have flexibility to create teacher schedules that support effective teaming & collaboration practices
  3. Longer term, explore options for providing substantially more instructional time for students

43% of incoming 9th grade students are HS-ready, with wide variation across schools

3-YR Avg. High-School-Ready Rate

District Wide = 43%

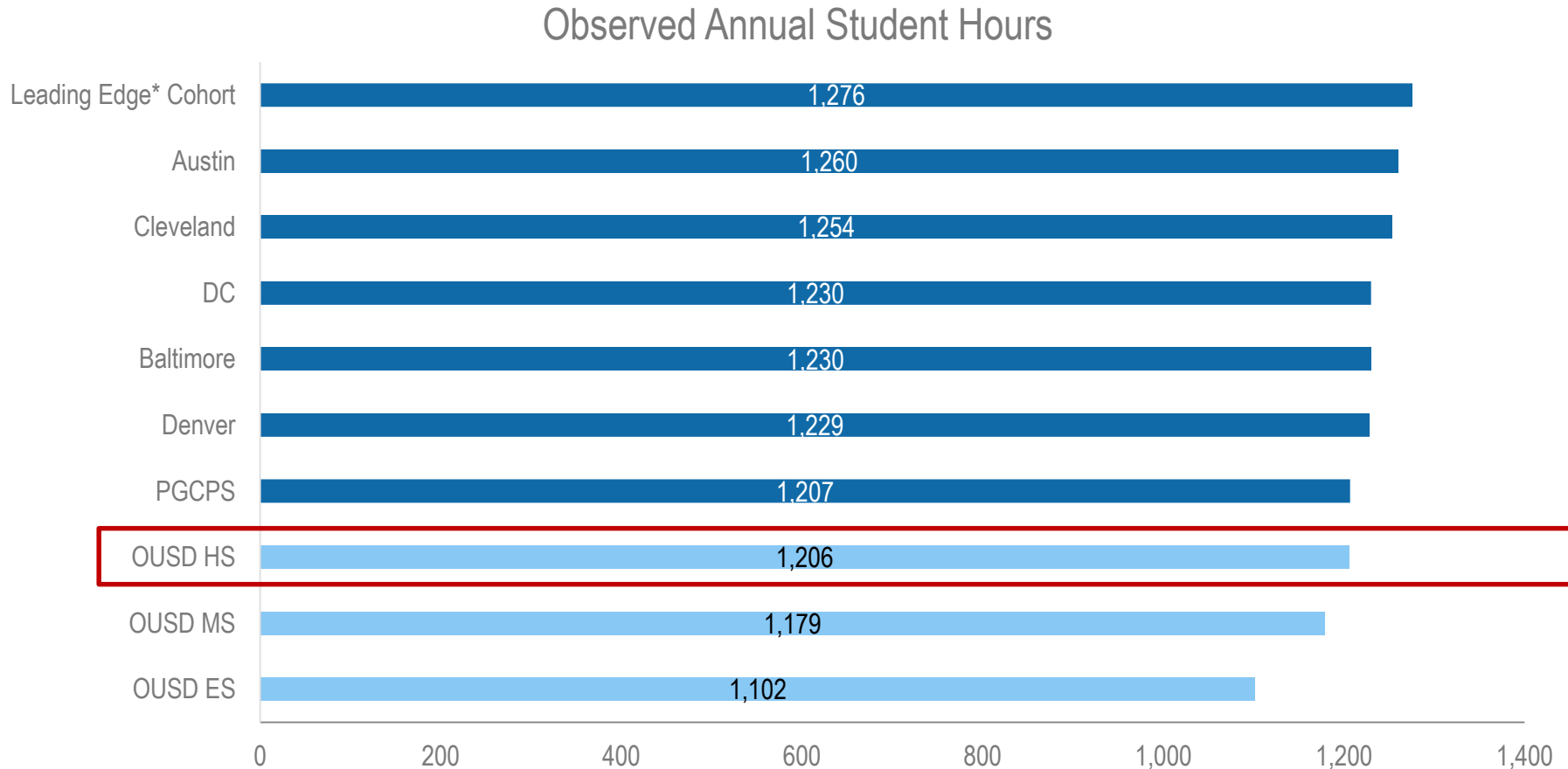|																
	Rudsdale	Dewey	Community Day	Bunche	Sojourner Truth	McClymonds	Castlemont	Fremont	Coliseum College Prep	MetWest	Madison Park	Life Academy	Skyline	Oakland HS	Oakland Tech.
HS-Ready Rate	1%	2%	4%	11%	17%	24%	27%	30%	34%	42%	47%	48%	45%	52%	62%
3-YR Avg. Graduation Rate	41%	27%	7%	48%	19%	61%	61%	52%	76%	76%	NA	77%	78%	71%	85%
	Alt					ISS			SBD				Comp		

Note: Oakland International was not included as HS readiness only represents less than 30% of their incoming freshman.

School Type Key: Alt = Alternative and Continuation, ISS = Intensive Support Schools, SBD = Small By Design, Comp = Comprehensive

Source: OUSD Data Dashboard, High School Readiness Indicator, ERS Analysis of SY2011-2015 data

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The comparatively short school day provides students with limited time and opportunity to become college and career ready

Observed Annual Student Hours

	Hours
Leading Edge* Cohort	1,276
Austin	1,260
Cleveland	1,254
DC	1,230
Baltimore	1,230
Denver	1,229
PGCPS	1,207
OUSD HS	**1,206**
OUSD MS	1,179
OUSD ES	1,102

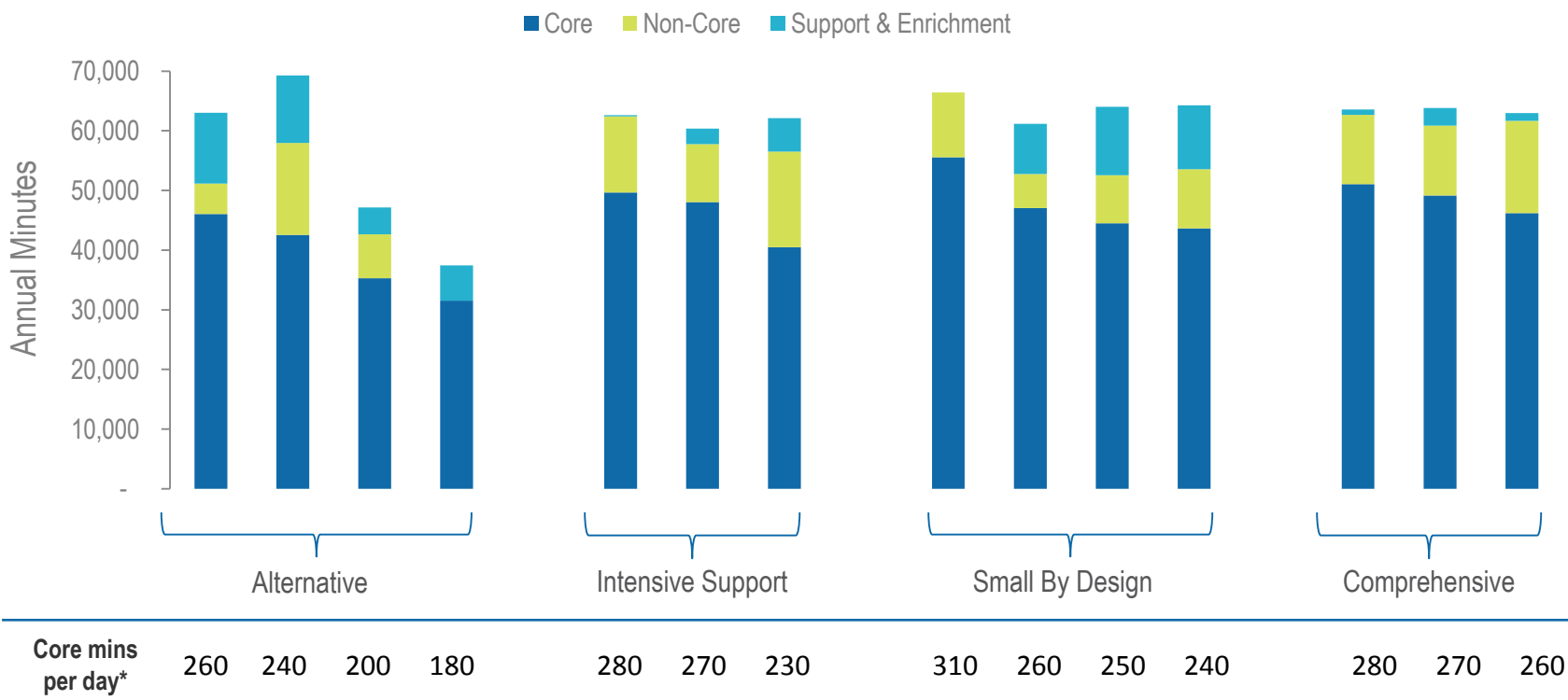*(horizontal axis: 0, 200, 400, 600, 800, 1,000, 1,200, 1,400)*

Leading Edge Small Urban High Schools: https://www.erstrategies.org/library/case_studies_of_leading_edge_small_urban_high_schools

Annual student hours represent the total length of the student day multiplied by the number of school days per year (includes lunch and passing time)

Sources: ERS Comparison Database, TR3 Database, OUSD total includes minimum instructional minutes for MS & HS plus 30 min per day for passing time and lunch to compare minimum annual student hours.

Across OUSD's school types, the use of instructional time varies dramatically

Instructional Time by Subject Area

■ Core ■ Non-Core ■ Support & Enrichment

Core mins per day*	260	240	200	180		280	270	230		310	260	250	240		280	270	260

Alternative — Intensive Support — Small By Design — Comprehensive

Annual difference between max and min core minutes by school = 15,041 minutes = 1.4 full year course

Note: Figures in this chart include 9th to 12th grade data. Sojourner Truth and MetWest were not included in this view given differences in their course schedule information. Calculation of 1.4 full year courses assumes a 180-day, 60-min per period, 1 period daily course, considering non-Alt.Ed. Schools only.
Source: OUSD 2014-2015 Course Schedule Data from AERIES; Bell Schedules.

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## Given limited time and variations in time use, are 9th graders set up for cohort graduation?

The answer lies in four questions:

1. How many credits are **possible** in a typical 4 year experience?

2. For how many credits are students **scheduled**?

3. Of all credits attempted, how many are **completed**?

   *Is it enough to meet the **230 credit** graduation requirement?*

4. Of all credits completed, how many are **A-G aligned**?

   *Is it enough to meet the **150 credits** of A-G aligned requirement for UC consideration?*

Meeting our cohort graduation goal of 85% will require proactive planning and strategic use of time, starting in 9th grade

The typical student's master schedule allows for 240 credits, 10 more than the required minimum for graduation

Share of OUSD HS Students by Credits Available in School Schedule

- 57%
- 26%
- 17%

■ 6 Periods 240 Credits ■ 7 Periods 280 Credits ■ 8 Periods 320 Credits
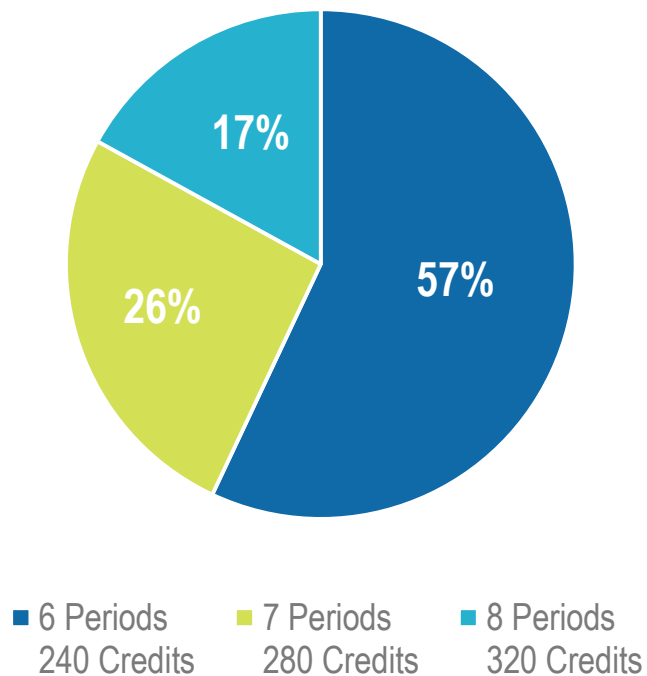
Additional periods provide more opportunity for credits, social emotional support, and other interventions

Source: OUSD 2014-2015 Course Schedule Data from AERIES.

To provide additional opportunities to earn credits, Oakland International extends the school day

Spotlight:

Oakland International

Teachers: 26

Students: 384

Average Class Size: 22

Average Teacher Load (Core): 94

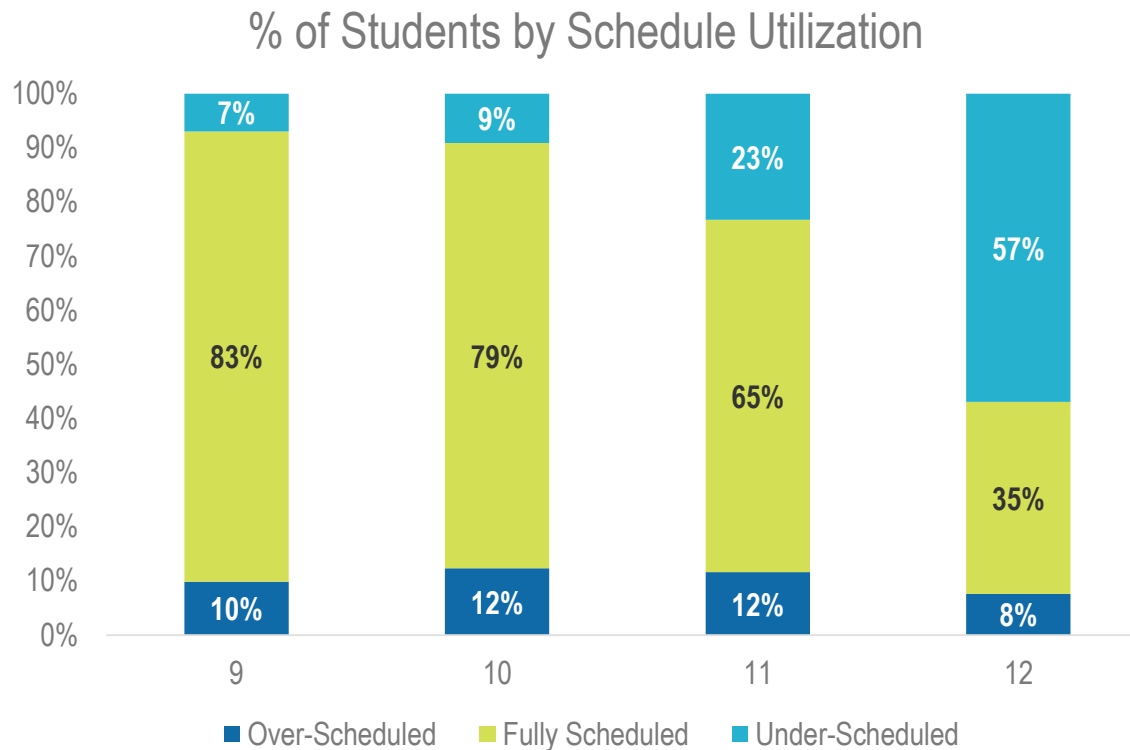% of Teachers cross core content: 0%

Teacher Utilization: 85%

- **After school**: additional period beyond the 6 period day focused on core content
  - 1 section - Algebra P
  - 1 section - Geometry P
  - 5 sections - Academy Literacy
- After school serves 28% of the student body overall

Note: Oakland International has modified their overall schedule since SY1415.

Source: OUSD 2014-2015 Course Schedule Data from AERIES

Across grade levels, an increasing share of students are under-scheduled, with those in 12th grade missing out on ~2 periods of learning time
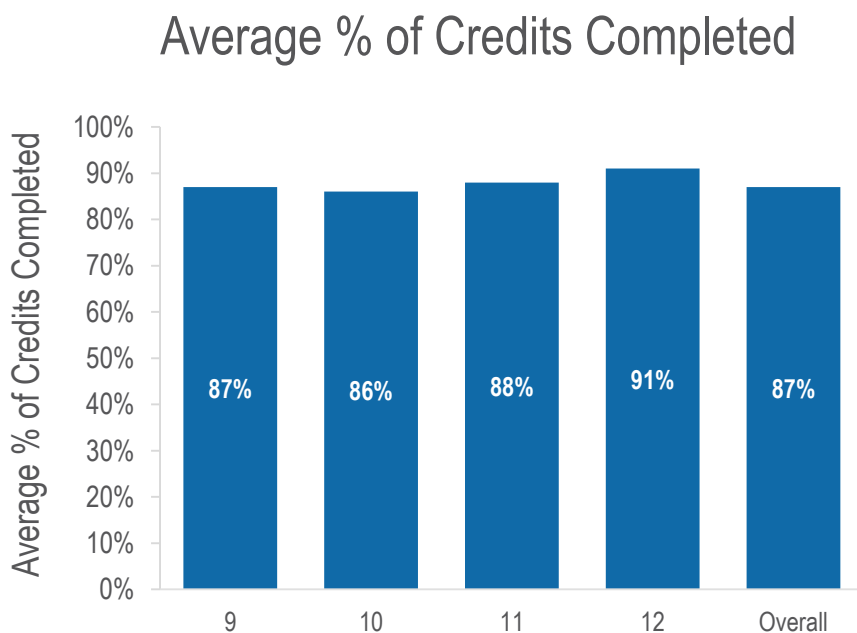
% of Students by Schedule Utilization

	9	10	11	12
Under-Scheduled	7%	9%	23%	57%
Fully Scheduled	83%	79%	65%	35%
Over-Scheduled	10%	12%	12%	8%

■ Over-Scheduled   ■ Fully Scheduled   ■ Under-Scheduled

Average Learning Time Loss for Under-Scheduled Students (Periods)	1.0	1.1	1.1	1.7

96% of time overall is scheduled as over-scheduled students compensate for those under-scheduled

Note: "content-free" time includes IWE, Study Hall, or "No Class" as designated in AERIES. Overscheduled represents students who partake in before or afterschool provided at their school sites.

Source: ERS Analysis

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Year over year, students only complete ~87% of attempted credits

Average % of Credits Completed

Average % of Credits Completed (y-axis, 0% to 100%)

- 9: 87%
- 10: 86%
- 11: 88%
- 12: 91%
- Overall: 87%

60% of the students not completing credits in 9th grade lose credit in ELA, Math, or both among other subjects

Note: Significant variation exists across schools. See Appendix B.

Source: OUSD SY2014-2015 Historical Transcript data, ERS Analysis.

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Recently celebrated for a 91% graduation rate, CCPA has an intersession model to provide targeted intervention and acceleration opportunities

Spotlight:
Coliseum College Prep Academy

Teachers: 31

Students: 461

Average Class Size: 25

Average Teacher Load (Core): 110

% of Teachers cross core content: 14%

Teacher Utilization: 67%

3-YR Avg. Graduation Rate: 76%

- Intersession at year-end for all students to take courses towards graduation requirements or credit recovery.

- Intersession courses:

Course Name	% of 9-12 Students	Average Class Size	# Sections
Reading Intervention	31%	25	3
APEX	30%	24	3
PE	29%	14	5
ART 1 P	10%	8	3

- Intersession could be more strategic if done on semester basis or paired with differentiation in class size by grade and content area.
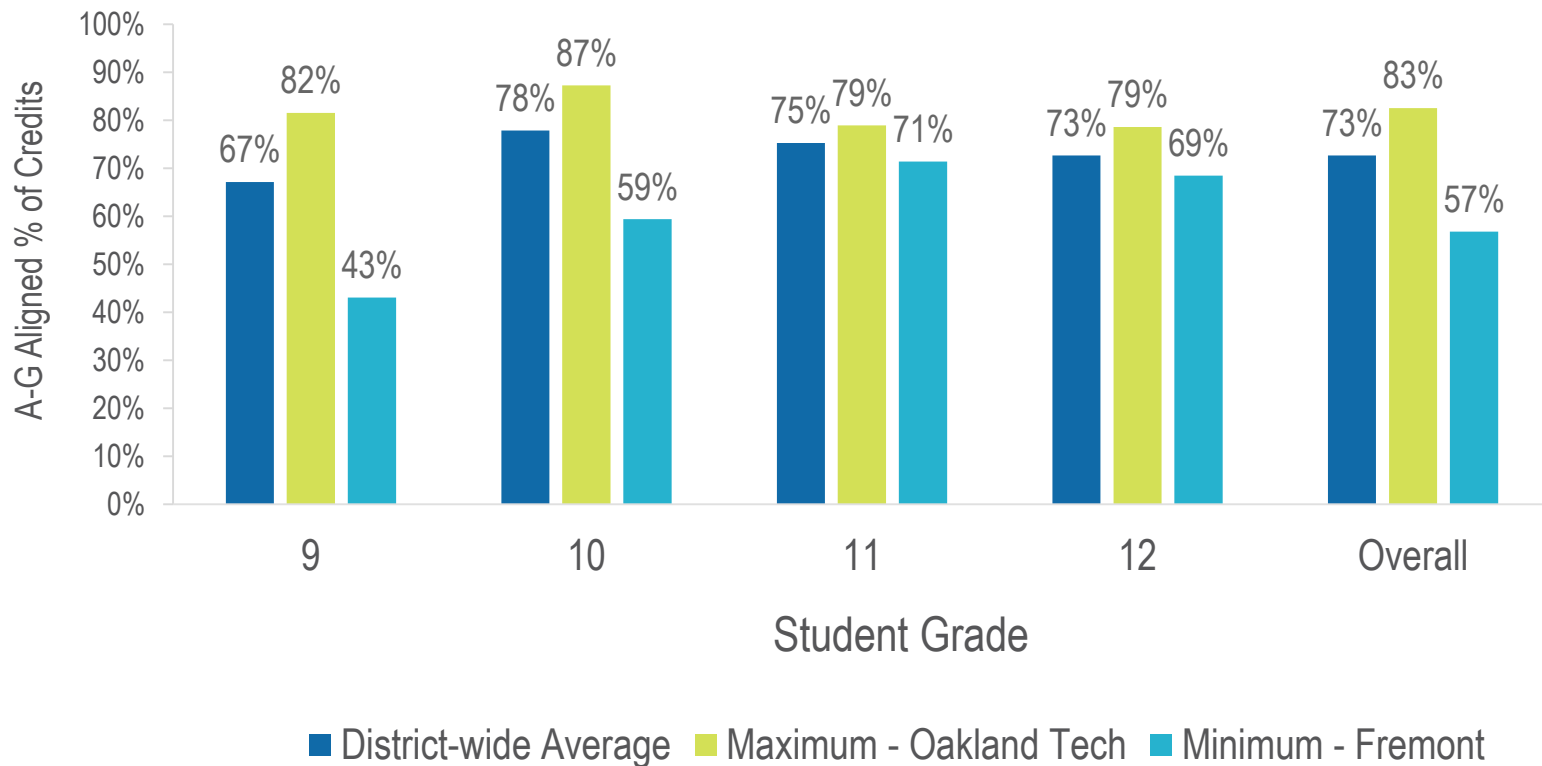
Note: Life Academy and Oakland International also have intersessions.
See Appendix A for School Reference Sheet.
Source: OUSD 2014-2015 Course Schedule data from AERIES; Interviews.

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73% of completed credits are A-G aligned, and there is a wide variation in course-taking patterns across schools

% of Credits Completed that are A-G Aligned

See Appendix C for all school level data. Average for Alternative and Continuation Schools is 67%.

Source: OUSD SY2014-2015 Historical Transcript data, ERS Analysis

Life Academy focuses on ensuring 9th grade success in A-G courses

Spotlight:

Life Academy

Teachers: 33

Students: 465

Average Class Size: 23

Average Teacher Load (Core): 107

% of Teachers cross core content: 8%

Teacher Utilization: 73%

Source: 2014-2015 Course Schedule Data from AERIES; interviews.

- Double blocking time:
    - Math for all to maintain heterogeneity and opportunity for all through success in Algebra and Geometry
    - Targeted ELA acceleration based on reading performance and teacher recommendations
- Small Classes for all 9th grade core, and all Math
    - Achieved by trading off larger 10 and 11th grade classes Sci/SS/Non-core classes

% time	9	10	11	12
Math	24%	12%	14%	14%
ELA	15%	12%	14%	29%
Class size				
ELA	18	32	32	27
Math	23	22	22	15
SS	25	32	32	NA
Sci	24	32	32	18
Non-Core	28	43	15	14

- Deep focus on Advisory
- Intersession schedule for intervention & acceleration opportunities

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A typical OUSD student falls 30 credits—a full semester— short of graduation requirements

Key Question	Resulting Max. Credits in Typical School
1. How many credits are **possible** in a typical 4 year experience?	240
2. For how many credits are students **scheduled**?	→ 230
3. Of all credits attempted, how many are **completed**?	→ 200
4. Of all credits completed, how many are **A-G aligned**?*	→ 145

Is it enough?

30 credits **under** the 230 credit graduation requirement

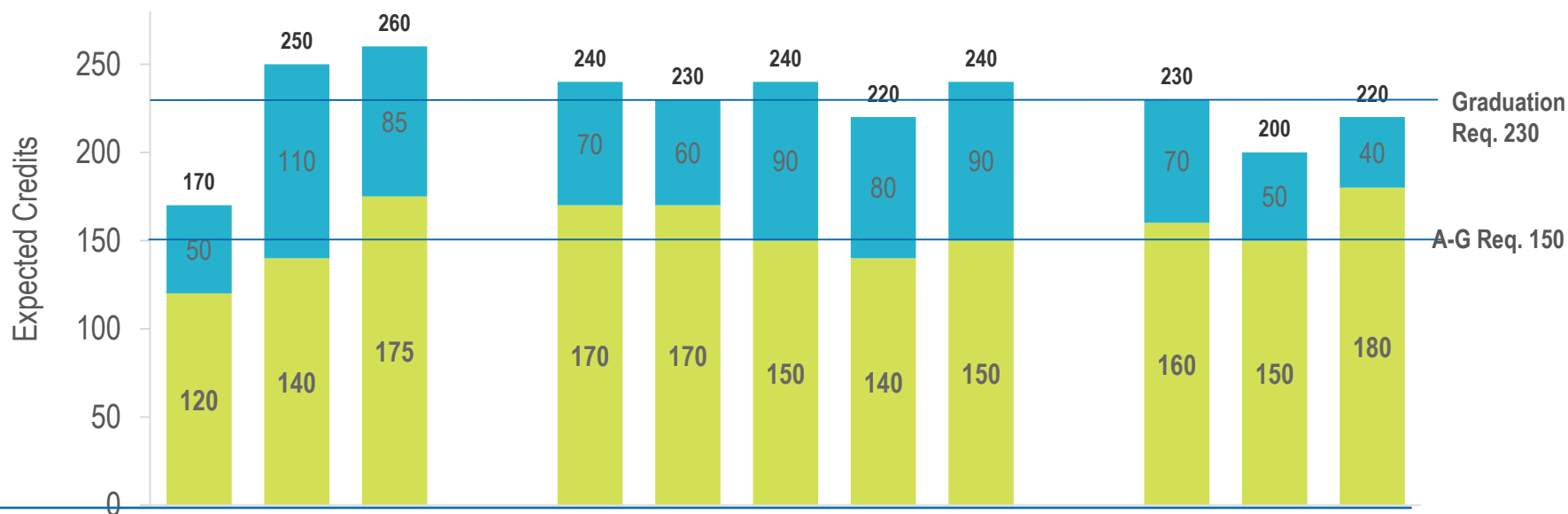5 credits **under** the *150 A-G aligned credits needed for UC consideration*

Source: ERS Analysis.

Note: The a-g aligned calculation assumes the courses are on track for students. Actual credits may be lower than 145 if students are repeating the same course year over year.

54% of OUSD's high schools, serving 42% of HS students, are set up for a typical student to meet the graduation and A-G requirements in 4 years

Expected Completed Credits in 4 Years

■ A-G Aligned   ■ Not Aligned

	Intensive Support			Small by Design					Comprehensive		
Total	170	250	260	240	230	240	220	240	230	200	220
Not Aligned	50	110	85	70	60	90	80	90	70	50	40
A-G Aligned	120	140	175	170	170	150	140	150	160	150	180
% of OUSD HS Students Served	6%	9%	3%	2%	5%	6%	4%	5%	20%	17%	22%
3-YR Avg. Graduation Rate	61%	52%	61%	76%	76%	NA	39%	77%	78%	71%	85%

Graduation Req. 230

A-G Req. 150

Source: OUSD SY2014-2015 Historical Transcript data, ERS Analysis based on 3 year avg. trends as of SY1415.

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Programs for Exceptional Children:

1. What is the nature and magnitude of spending on Programs for Exceptional Children?

2. What role do ethnicity and gender play in student identification and placement into special day classes?

Programs for Exceptional Children

- *Key Questions*
    1. What is the nature and magnitude of spending on Programs for Exceptional Children?
    2. What role do ethnicity and gender play in student identification and placement into special day classes?

- *Summary of Analysis & Insights*
    1. OUSD's per-pupil spend on more Self-Contained/"Special Day Classrooms" is 35% higher than observed elsewhere
    2. OUSD serves a higher share of students with disabilities in more restrictive/separate placements than other districts studied
    3. African-American boys are disproportionately identified as students with disabilities (SWD) and placed in more restrictive environments

- *Action Implications*
    1. Continue efforts implementation of inclusion models, with a specific focus on reducing disproportionate isolation of African American males in substantially separate settings
    2. Explore the development of inclusion model design prototypes to enable schools to implement inclusion programs consistent with their specific student needs, teacher characteristics, and school contexts

In OUSD, passing rates for students with disabilities (SWD) lag behind the state by 5-9 percentage points across all grades

% of Students with Disabilities Meeting or Exceeding State Standards
OUSD vs. Statewide Average
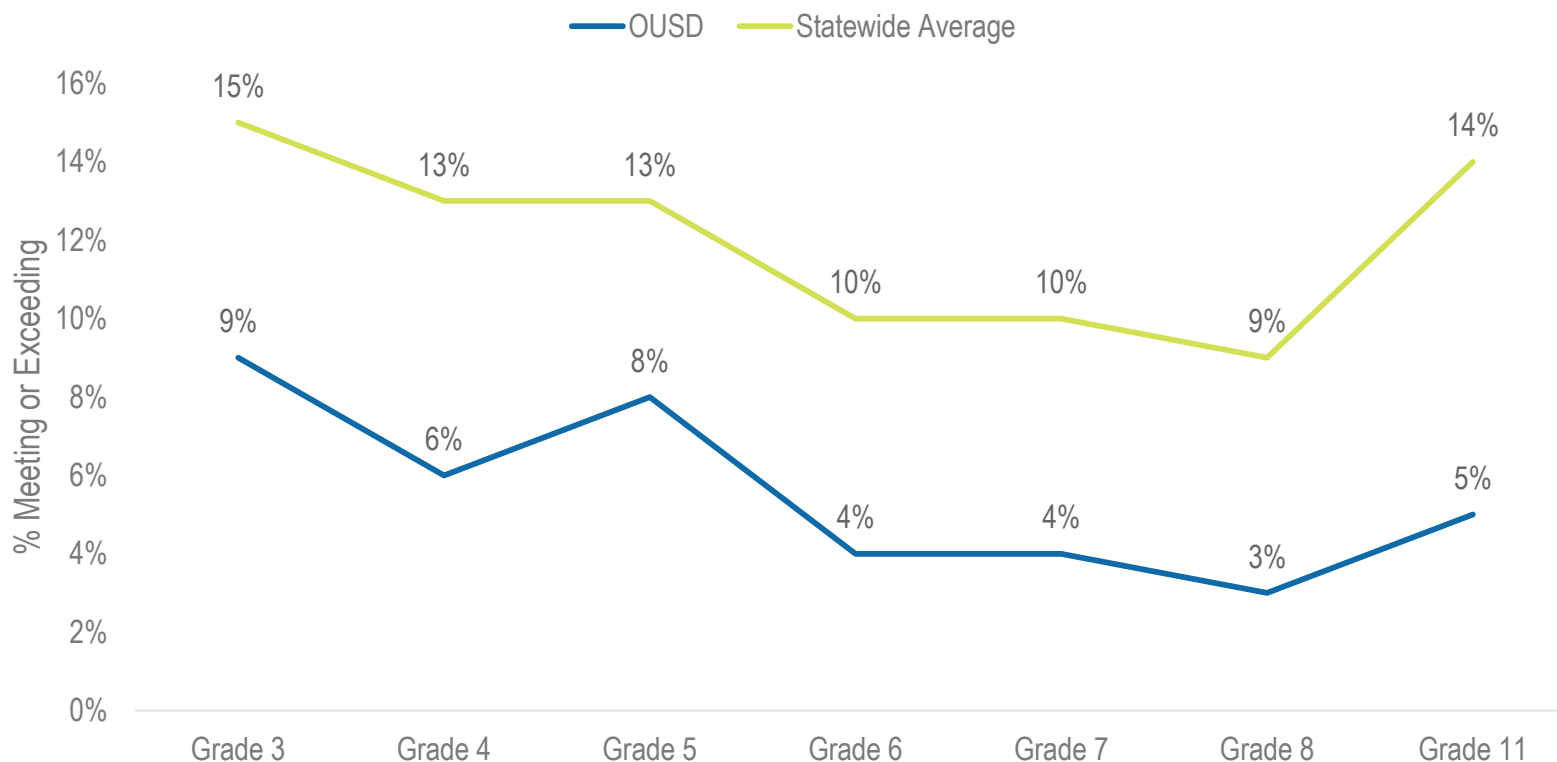
Source: OUSD SY 2014-15 Expenditure Data; ERS Comparison Database.

Is OUSD spending enough to support students with disabilities? Relative to identification rates, OUSD spends more than most comparison districts

Spend on Students with Disabilities (SWD) as % of Total Budget
(bars indicate % of SWD)
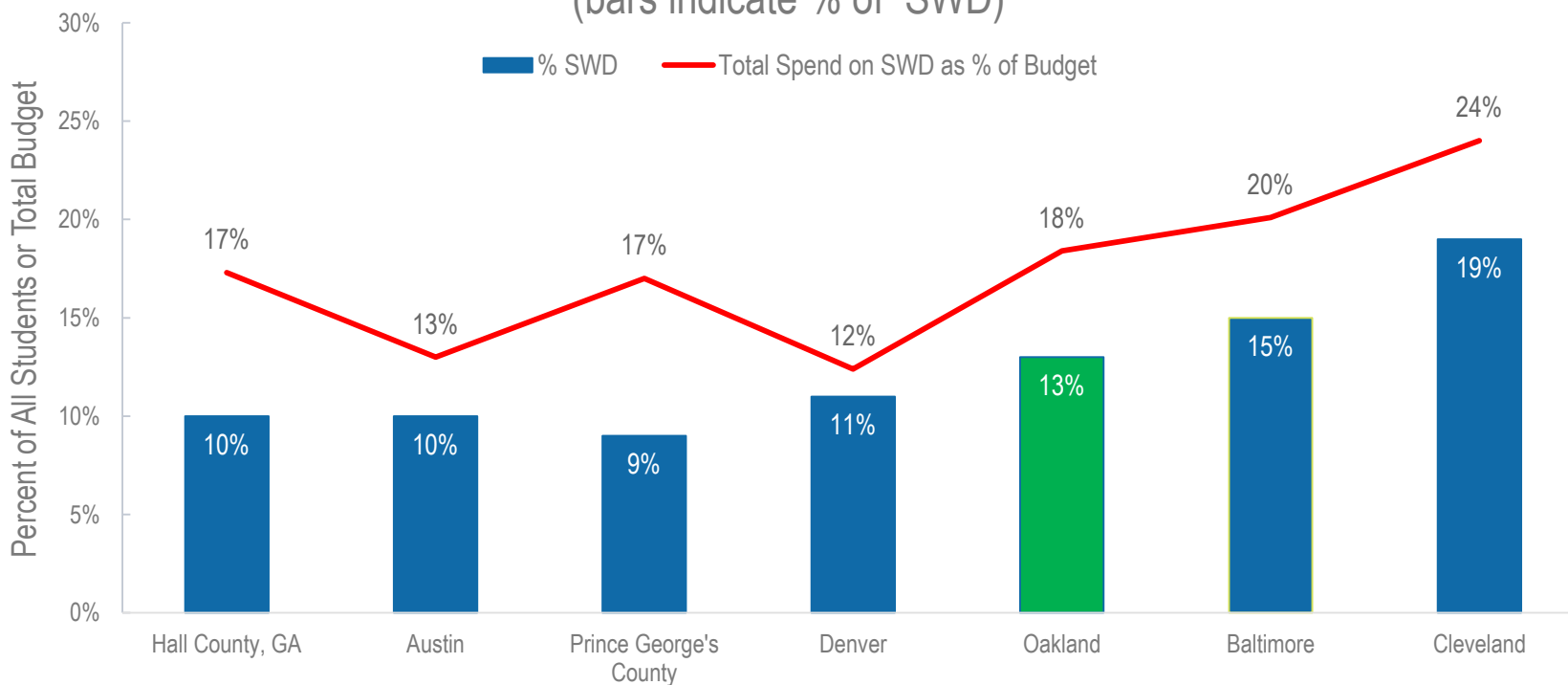
Ratio of Spending/ Students	Hall County, GA	Austin	Prince George's County	Denver	Oakland	Baltimore	Cleveland
	1.7	1.3	1.7	1.1	1.4	1.3	1.3

Source: OUSD SY 2014-15 Expenditure Data; ERS Comparison Database. Data for Baltimore and Hall County was not available for this specific view.

What drives the differences in resource use across districts?
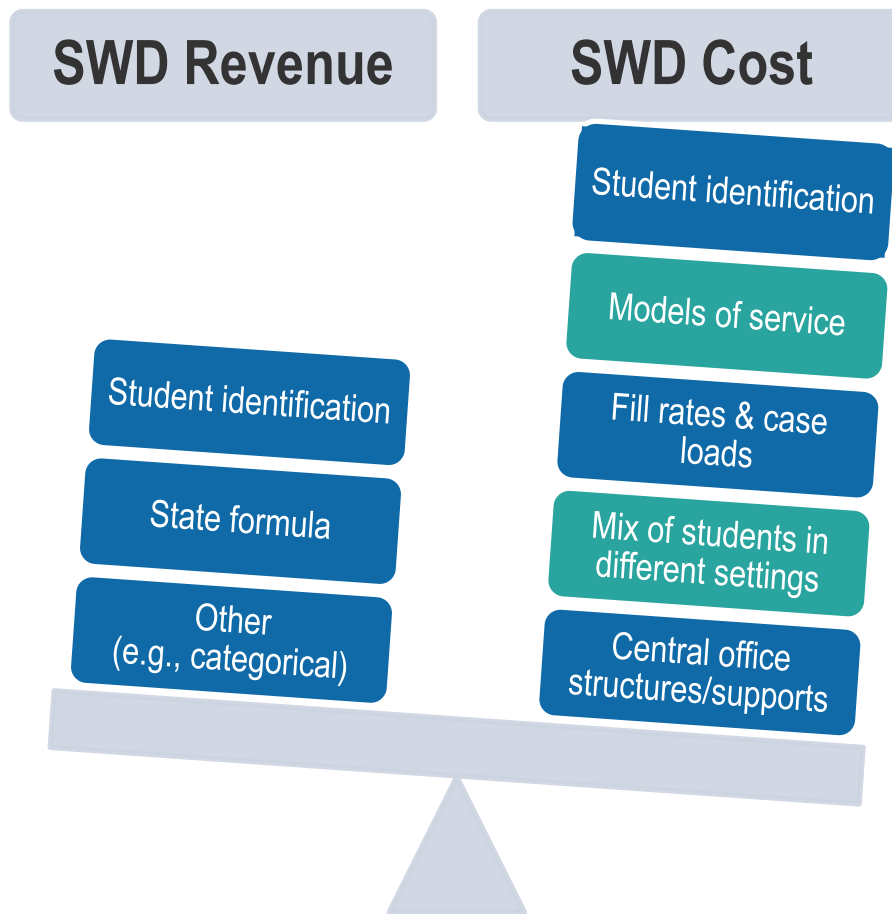
ERS methodology calculates the per-pupil spend for OUSD's three categories of models of service as we do for students in poverty and ELLs

Dollars per Pupil by Student Type
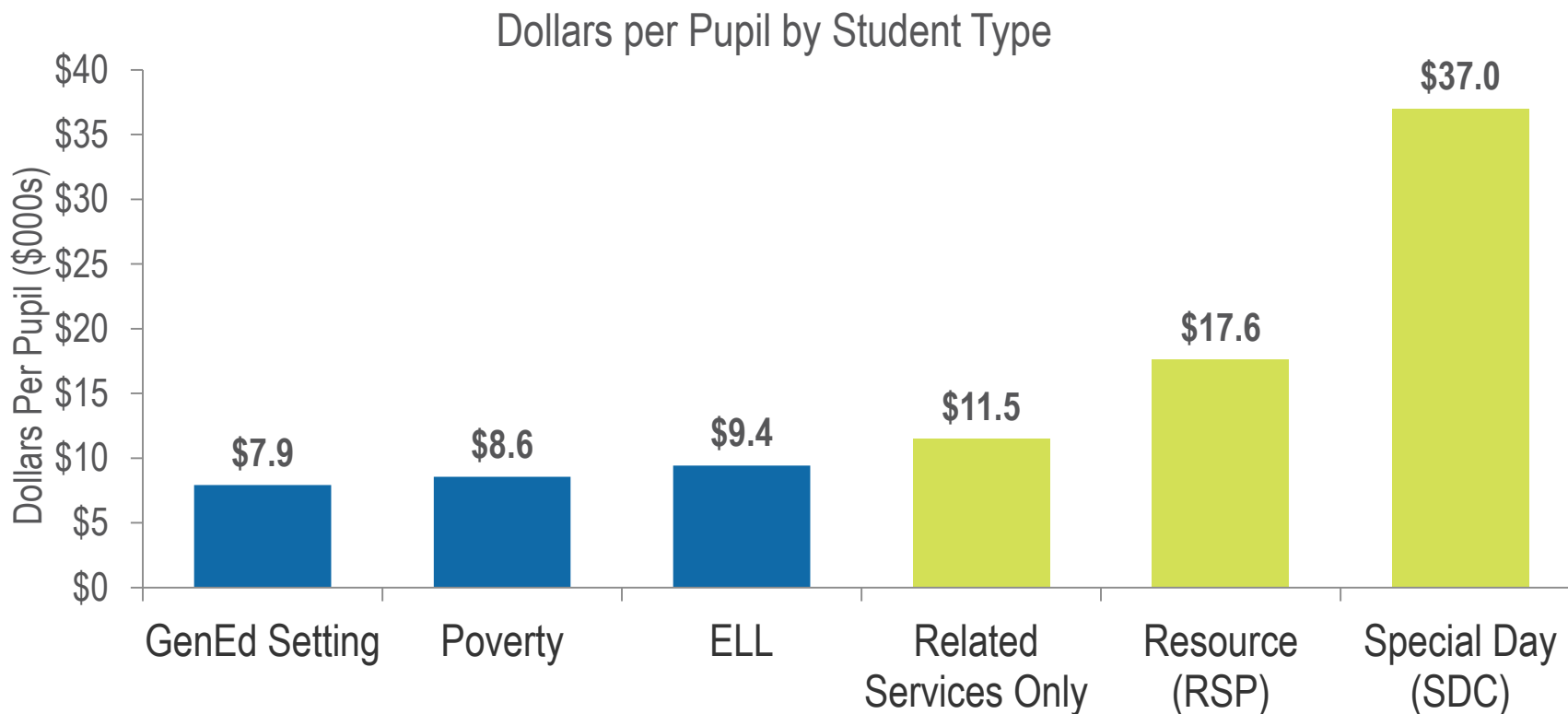
	GenEd Setting	Poverty	ELL	Related Services Only	Resource (RSP)	Special Day (SDC)
Dollars Per Pupil ($000s)	$7.9	$8.6	$9.4	$11.5	$17.6	$37.0
Ratio	1.00	1.08	1.19	1.47	2.25	4.62
# of Pupils*	37,903	29,294	11,476	677	2,545	1,570

Students that are Poverty, ELL, and SWD-Related Services, and SWD Resource/Inclusion are also served in a GenEd Setting

Note: Equity analysis is K-12 only

Source: OUSD 2014-15 Expenditure Data; ERS Analysis; ERS Comparison Database
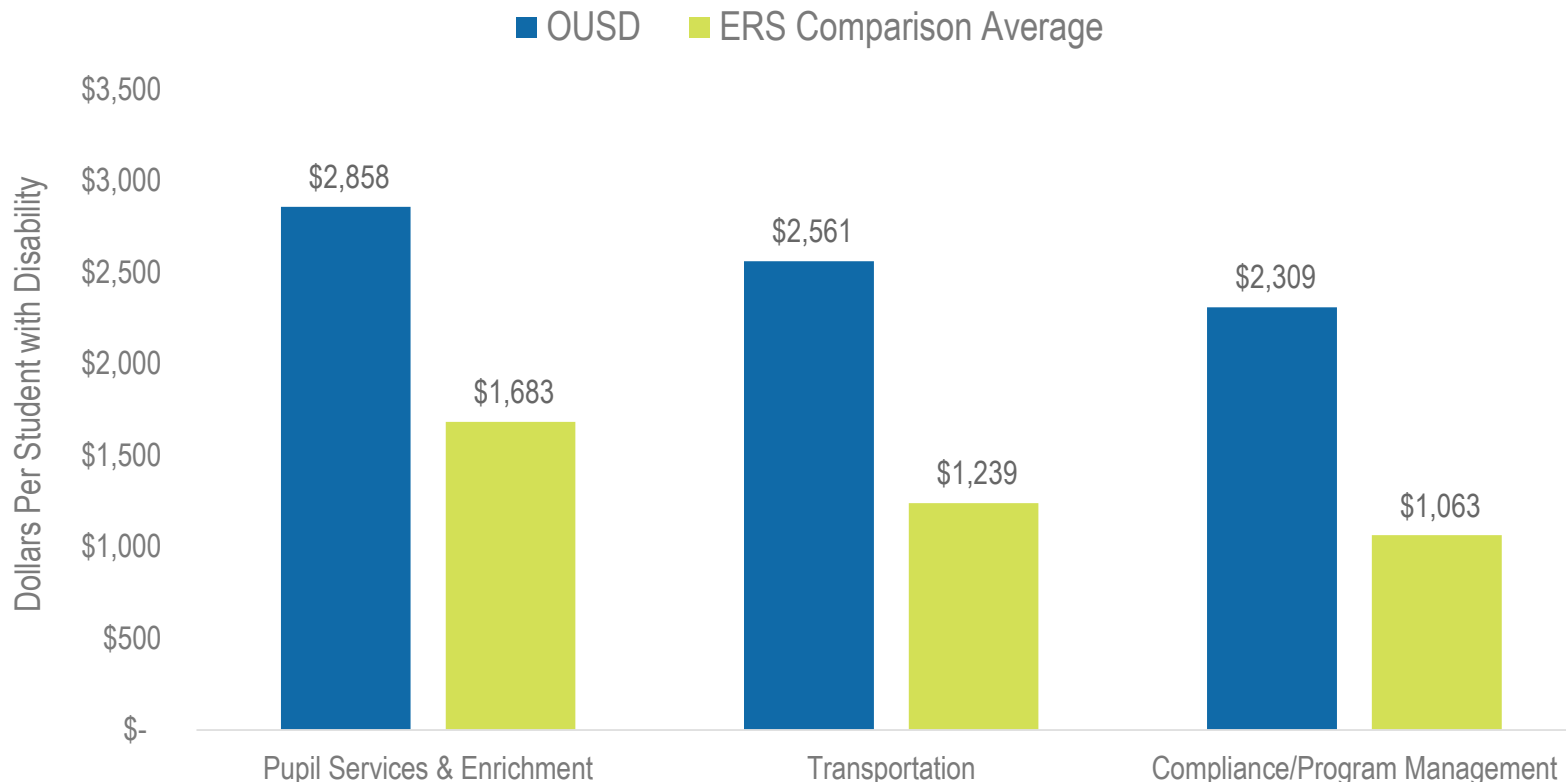
Relative to the Gen Ed per-pupil base, these extra amounts for students with additional needs are comparable to those observed elsewhere, except for Special Day Classes in which OUSD is investing 35% more than Peer Median

District	Gen Ed base ($000 pp)	Poverty	ELL	Resource / Inclusion	"Special Day"
Oakland	**$7.93**	**1.08**	**1.19**	**2.25**	**4.62**
Peer Median	**$9.48**	**1.10**	**1.17**	**2.43**	**3.43**
Austin	$8.20	1.09	1.09	2.21	3.89
Cleveland	$12.35	1.12	1.11	2.11	3.43
Denver	$9.35	1.13	1.12	2.35	3.63
Hall County, GA	$9.34	1.06	1.29	2.50	2.92
Baltimore	$10.30	1.10	1.50	3.00	3.10
Prince George	$9.60	1.06	1.22	2.76	3.43

District-wide, this results in an additional $16M spend on SDC classrooms

In OUSD, half of the higher spend ($8M) can be explained by higher spend on Pupil Services, Operations & Maintenance and Instructional Support and Professional Development for all students with disabilities…

Special Education Dollars per SWD by Use
(OUSD vs. Comparison District Average)

■ OUSD   ■ ERS Comparison Average

Dollars Per Student with Disability

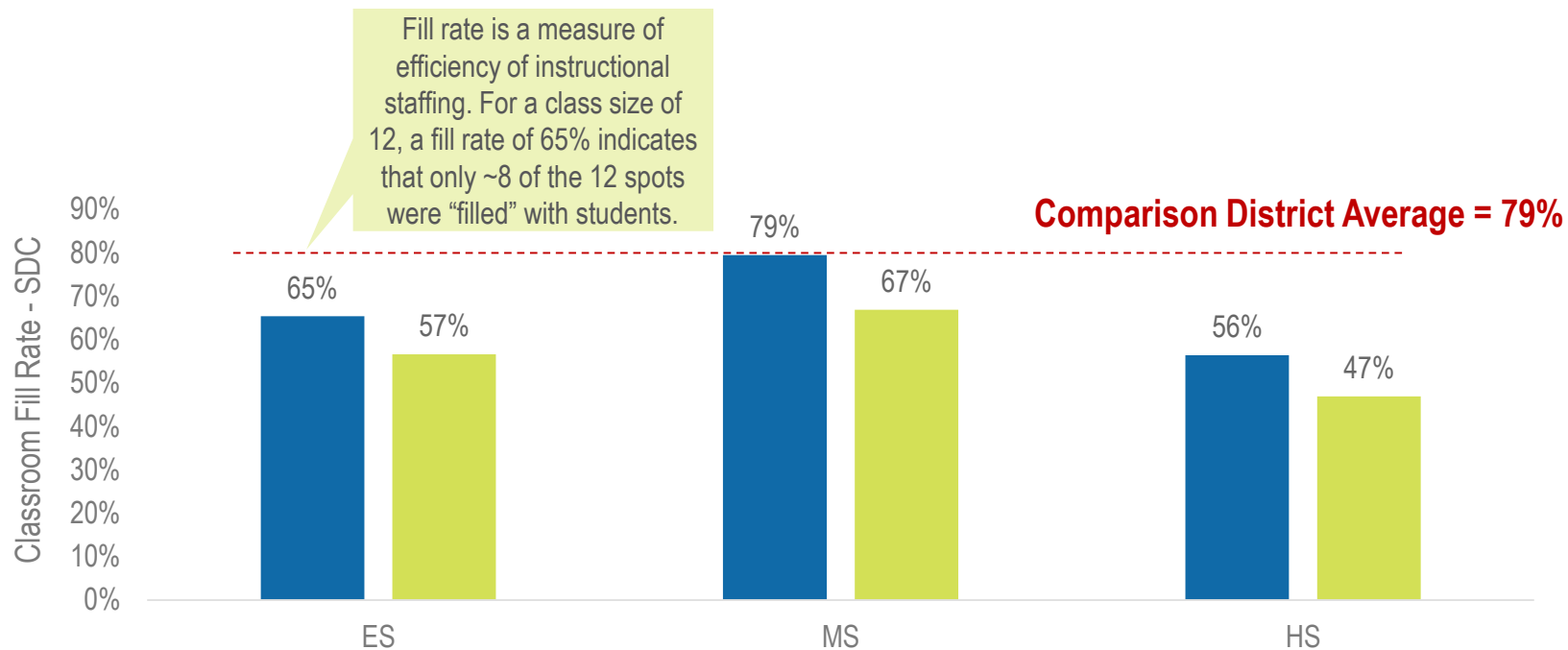|	OUSD	ERS Comparison Average
Pupil Services & Enrichment	$2,858	$1,683
Transportation	$2,561	$1,239
Compliance/Program Management	$2,309	$1,063

Note: Equity analysis is K-12 only

Source: OUSD SY14-15 Expenditure Data; ERS Analysis; ERS Comparison Database

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…and the other half of this additional spend ($8M) on SDC can be explained by "empty seats" relative to district class size guidelines
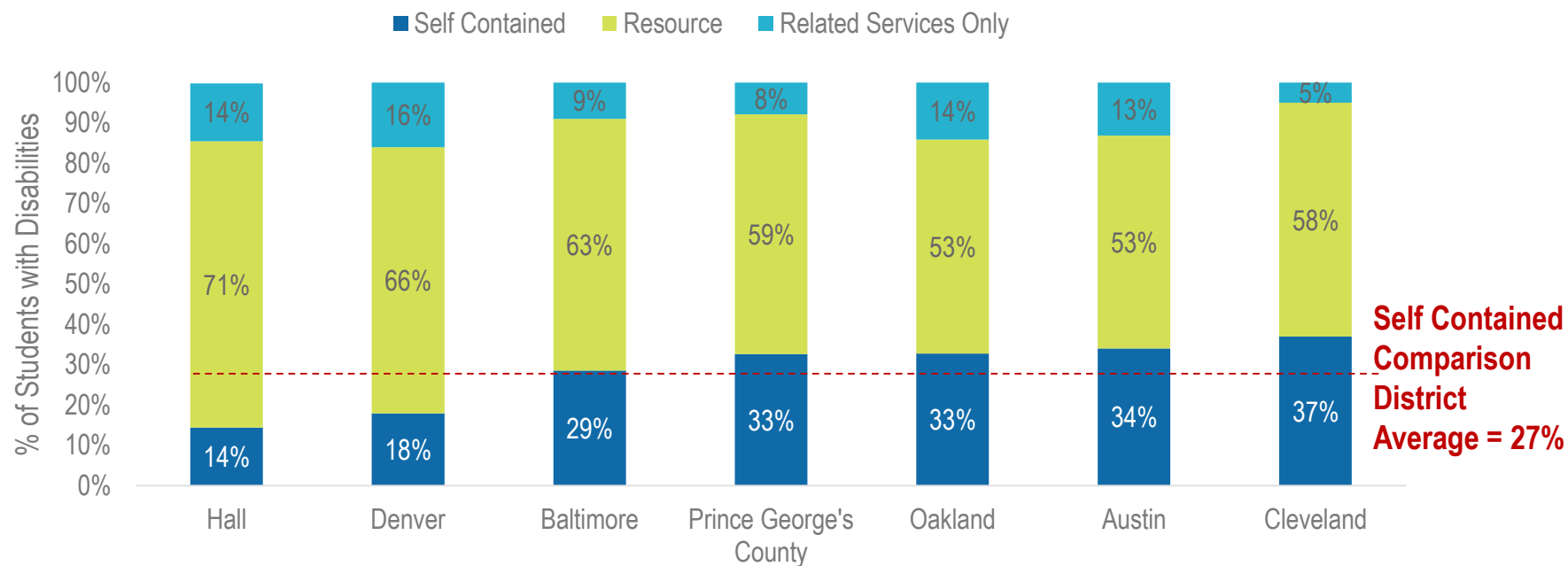

Classroom Fill Rate for SDC

■ Assuming target class size of 12   ■ Assuming target class size of 15

Fill rate is a measure of efficiency of instructional staffing. For a class size of 12, a fill rate of 65% indicates that only ~8 of the 12 spots were "filled" with students.

Comparison District Average = 79%

Classroom Fill Rate - SDC

	ES	MS	HS
Target class size of 12	65%	79%	56%
Target class size of 15	57%	67%	47%

ERS calculated fill rate using OUSD's class size guidelines from SY14-15, including differential guidelines for students with Autism

Based on an analysis of the mix of students and settings, it appears OUSD serves 1.2x as many students with disabilities in self-contained (more-restrictive) environments than comparison districts
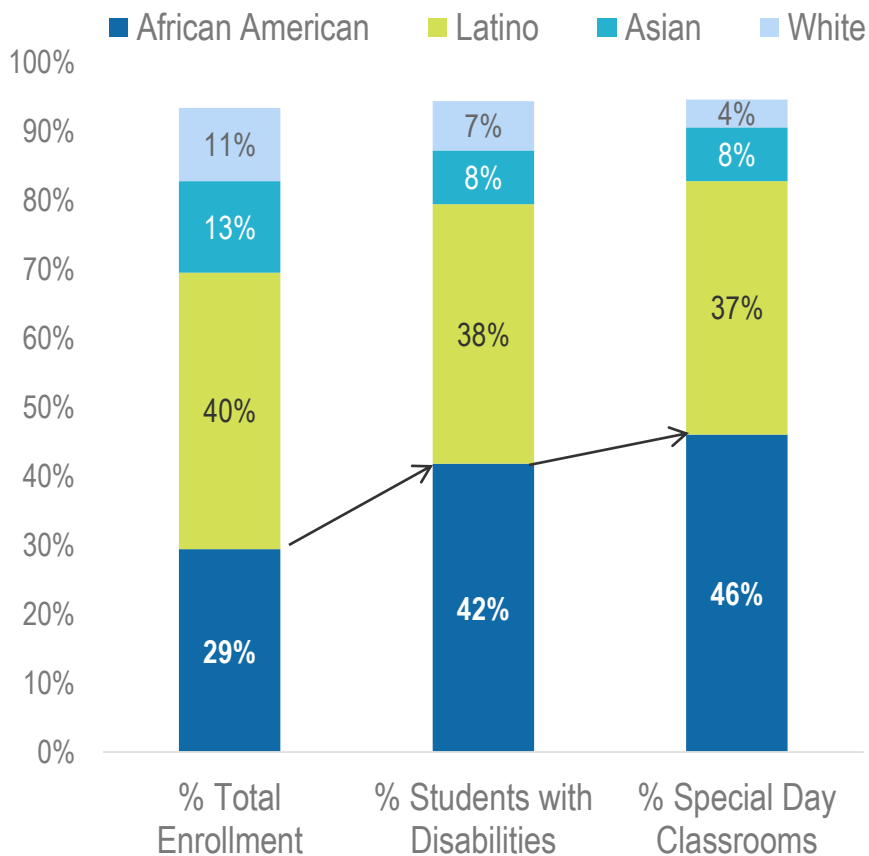
PreK-12 Models of Service,
as a Percentage of Students with Disabilities

■ Self Contained   ■ Resource   ■ Related Services Only

	Hall	Denver	Baltimore	Prince George's County	Oakland	Austin	Cleveland
Related Services Only	14%	16%	9%	8%	14%	13%	5%
Resource	71%	66%	63%	59%	53%	53%	58%
Self Contained	14%	18%	29%	33%	33%	34%	37%

Self Contained Comparison District Average = 27%

% of Students with Disabilities

Source: ERS Comparison Database; OUSD SY 2014-2015 Student Data
The breakdown of eligibility rates was only available for the 6 districts above.

African American students make up 29% of the total district enrollment, yet they represent 46% of all students in special day classrooms
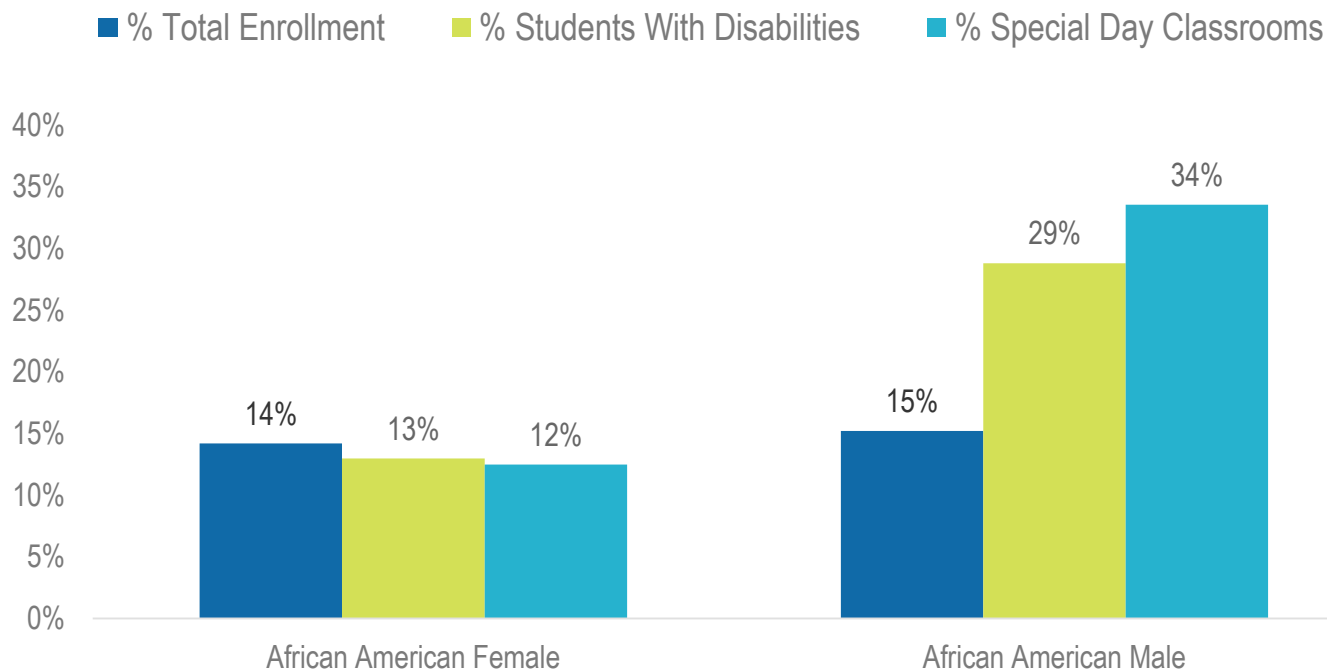
Identification and Placement into Special Day Classrooms as compared to % Total Enrollment by Ethnicity

■ African American ■ Latino ■ Asian ■ White

	% Total Enrollment	% Students with Disabilities	% Special Day Classrooms
White	11%	7%	4%
Asian	13%	8%	8%
Latino	40%	38%	37%
African American	29%	42%	46%

African American students are 1.6X as likely to be placed into SDC than expected rates, and 4.4X as likely as White students

Source: OUSD SY 2014-15 Student data

…and disaggregating by gender uncovers greater disparity in African American male identification and placement into special day classes

Identification and Placement Rates for African American Students by Gender

■ % Total Enrollment   ■ % Students With Disabilities   ■ % Special Day Classrooms

African American male students are 2.3X as likely to be placed into SDC classes relative to proportion of enrollment

Note: likelihood based on observed trends in PEC placement/identification and placement into special day classrooms. African American males are both most likely to be identified as a student with disability and, within PEC students, AA males are most likely to be placed into a more restrictive environment.
Source: OUSD SY 2014-15 Student data

OUSD leadership has sought to address these disparities by growing inclusion models to students' needs in less restrictive settings

Design elements	Options to consider
Total class size	• Push inclusion students into classrooms without changing class size in accordance with state law and CBA language or shrink the class size considerably to enable individualized instruction
Number of students with disabilities in class	• Schools can create inclusion classes for as few as a single student or as many as policy caps allow, consistent with the needs of the individual students being served
Teacher staffing & collaboration	• Assign dual-certified teachers to inclusion classrooms or implement co-teaching • Alternatively, districts can choose to have a hybrid model where the special education (RSP) teacher pushes in for some portion of the day where the RSP teacher and the general education teachers share common planning time

Given the current level of investment in Special Day Classes, OUSD should have some flexibility to design inclusion models that fit student need and school context

School Portfolio:

1. How is OUSD's portfolio different from other peer districts?

2. How does the enrollment of the school affect its ability to meet student needs and create positive working conditions for teachers?

School Portfolio

- *Key Questions*
  1. How is OUSD's portfolio different from other peer districts?
  2. How does the enrollment of the school affect its ability to meet student needs and create positive working conditions for teachers?
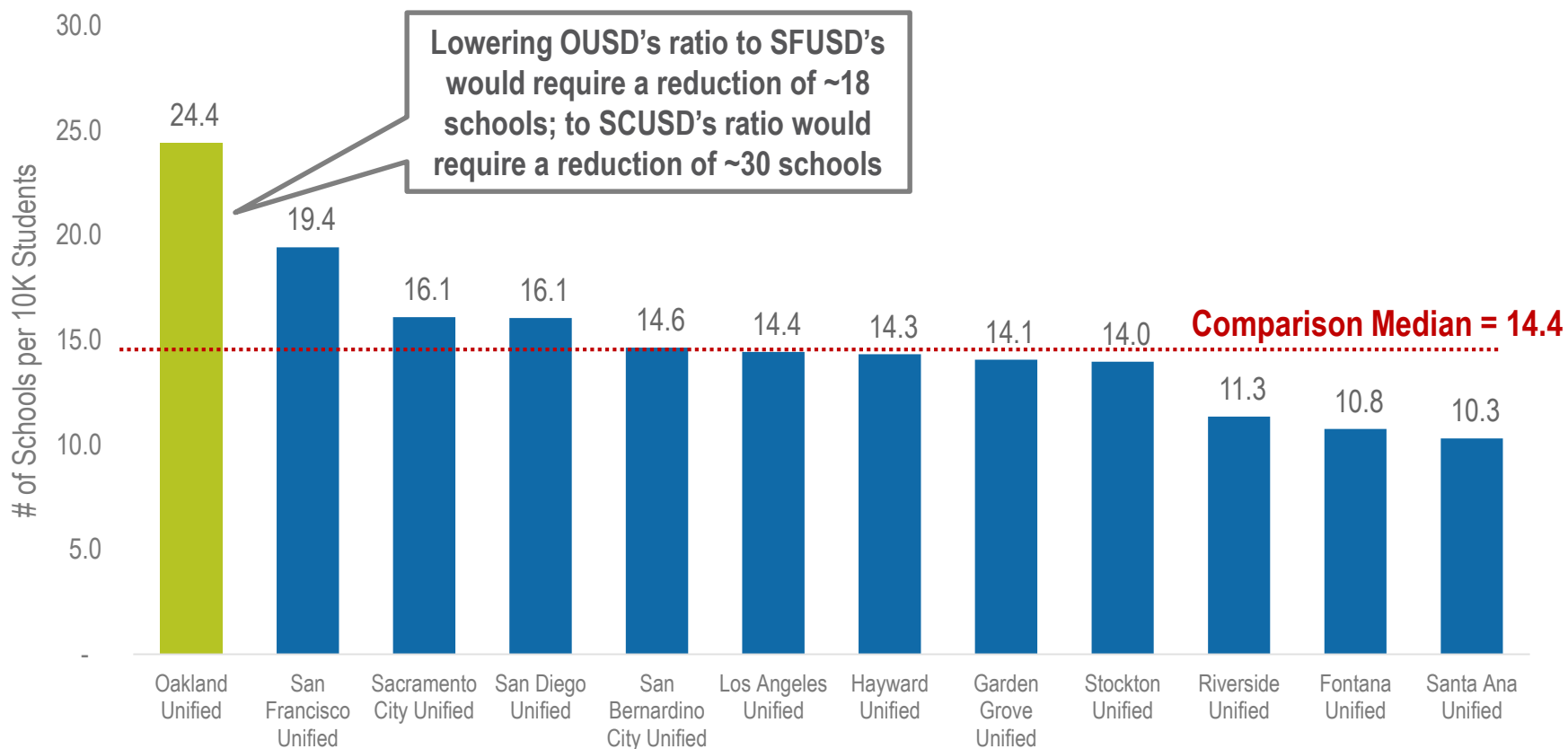
- *Summary of Analysis & Insights*
  - The large numbers of under-enrolled schools in OUSD make it difficult to provide students with a complete set of services consistent with the Pathway to Excellence vision and provide teachers with working conditions that foster professional growth and effective practice

- *Action Implications*
  1. Explore options for expanding seats in high-performing schools
  2. For small-by-design schools, support schedule design to promote teacher collaboration on shared content across schools
  3. Use program & facility consolidation to improve student experience and teacher working conditions
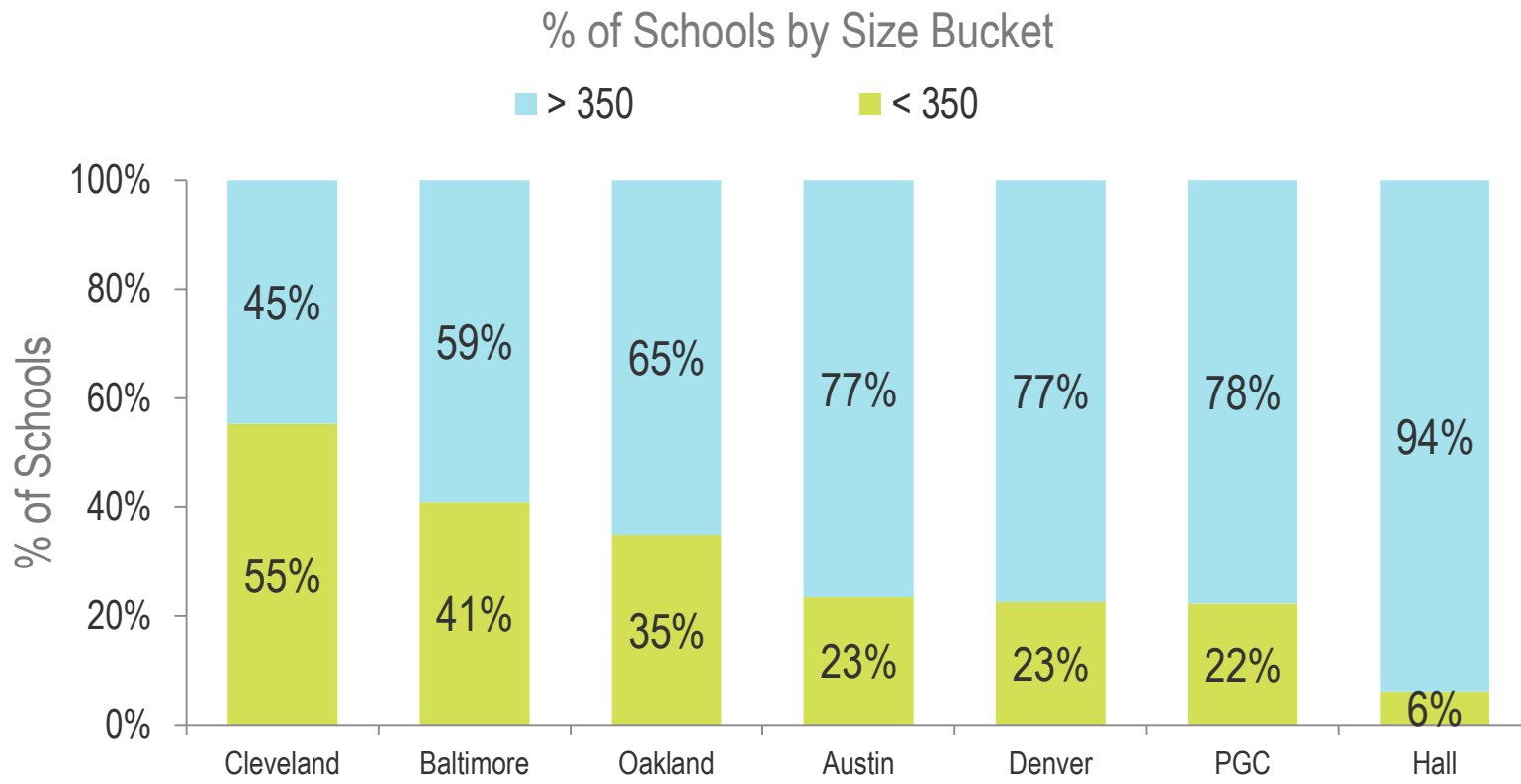
OUSD operates a larger school portfolio given its size relative to other districts in California…

# of Schools per 10K Students by CA District
(Excludes Charter Schools and Students)

Lowering OUSD's ratio to SFUSD's would require a reduction of ~18 schools; to SCUSD's ratio would require a reduction of ~30 schools

Comparison Median = 14.4

Source: CADOE Public Data

…And other districts across the country

% of Schools by Size Bucket

> 350   < 350

The high proportion of "low-enrollment" schools in OUSD is due in part to:

1. Small buildings with low capacity, disproportionately in *lower* stress communities as defined by the SRA

2. A deliberate small-school strategy, particularly at secondary level to address overcrowded and under-resourced schools

3. Investment in alternative school models

4. Under-enrolled schools – disproportionately in higher stress communities

While school size is one lever to increase support to students, larger schools can also create personalized learning communities by strategically grouping students and teachers
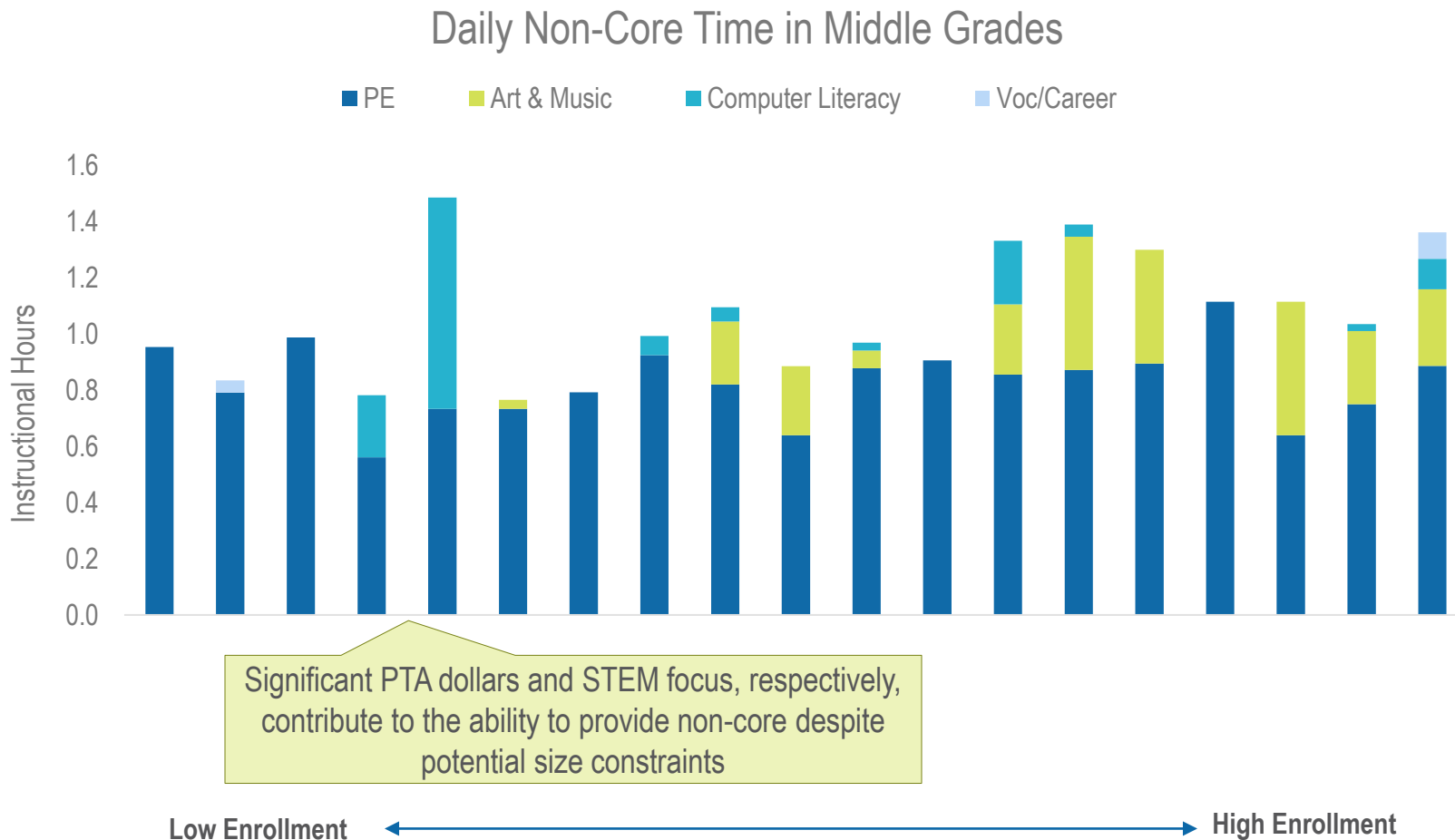
Spotlight:
Edna Brewer

Teachers: 32
Students: 816
Average Class Size: 29
Average Teacher Load (Core): 133
% of Teachers cross core content: 56%
Teacher Utilization: 86%

- Student load is roughly half of the overall grade size for all grades*
- Students are heterogeneously grouped into 'Families' and scheduled to the same core and advisory teachers
- 'Families' travel to classes together in the same wing of their school building and are looped in 7th and 8th grade
- Teachers collaborate within their families weekly

Student load is the total number of unique peers that a student will see throughout their academic day in all courses.

Source: OUSD 2014-2015 Course Schedule Data from AERIES

Low-enrollment schools have a harder time offering a full set of course offerings to students, specifically art & music courses

Daily Non-Core Time in Middle Grades

■ PE ■ Art & Music ■ Computer Literacy ■ Voc/Career

Significant PTA dollars and STEM focus, respectively, contribute to the ability to provide non-core despite potential size constraints

Low Enrollment ← → High Enrollment

83

28% of ES/K-8s typically have 2 or fewer teachers per grade*…

of Teachers per Grade by School Enrollment –
ES/K-8 Schools Only
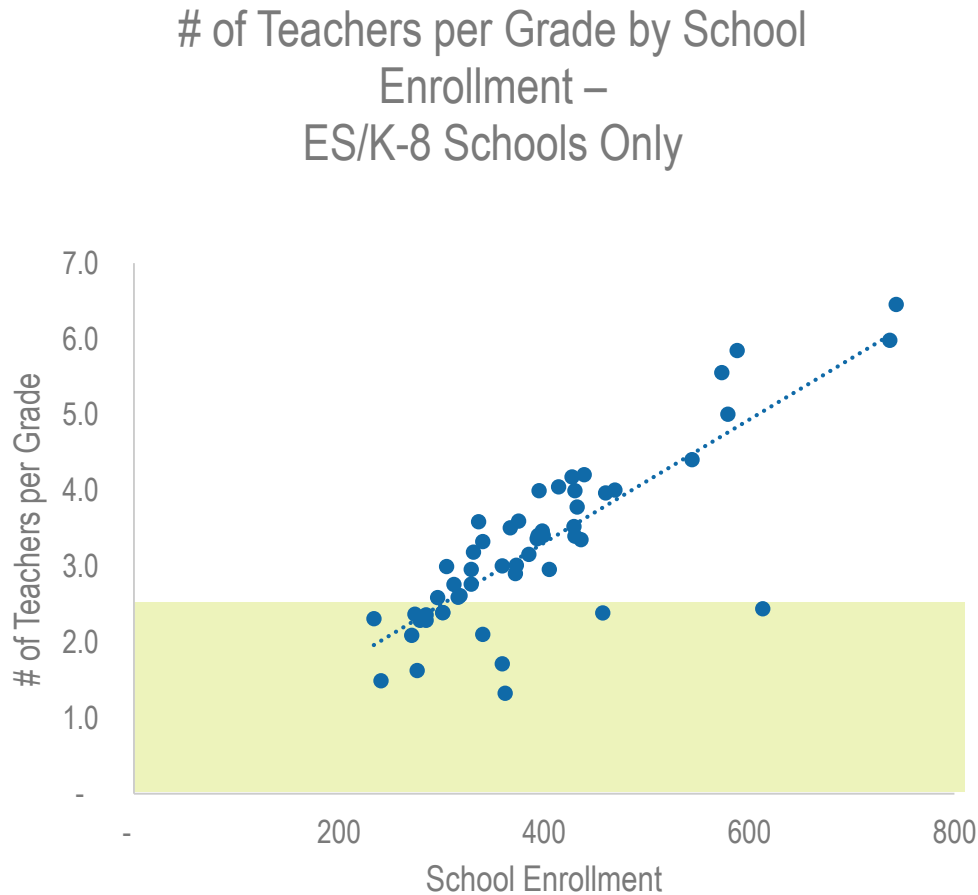
**…thereby providing limited opportunity for strategic small group instruction and acceleration**

Note: Based on rounded FTEs per grade level, so this includes the % of schools where the average number of teachers per grade level was up to 2.5 FTEs

Source: OUSD 2014-2015 Course Schedule Data from AERIES

84

Low-enrollment schools provide limited access to peers for teachers to improve instructional practice through collaboration

Illustrative Example

Small K-8   VS.   Large K-8

| K |
| 1 |
| 2 |
| 3 |
| 4 |
| 5 |
| 6 |
| 7 |
| 8 |
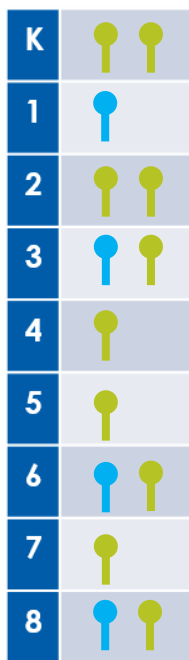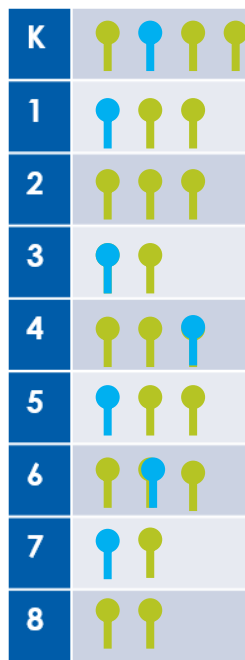
Teacher Leader/Expert   Other Teachers

% of teachers with potential to collaborate with an expert peer

50%   80%

However, even where there is sufficient talent to collaborate, few opportunities for teachers to meet given the limited release time during the academic day*

Source: ERS Analysis, illustrative example where the % of above average & effective teachers is consistent across schools of various sizes.

No release at the ES level, and see Appendix C for an example of 6th grade teaming potential

85

At the high school level, teachers also have fewer natural opportunities for shared-content teaming

# of Geometry Teachers by High School
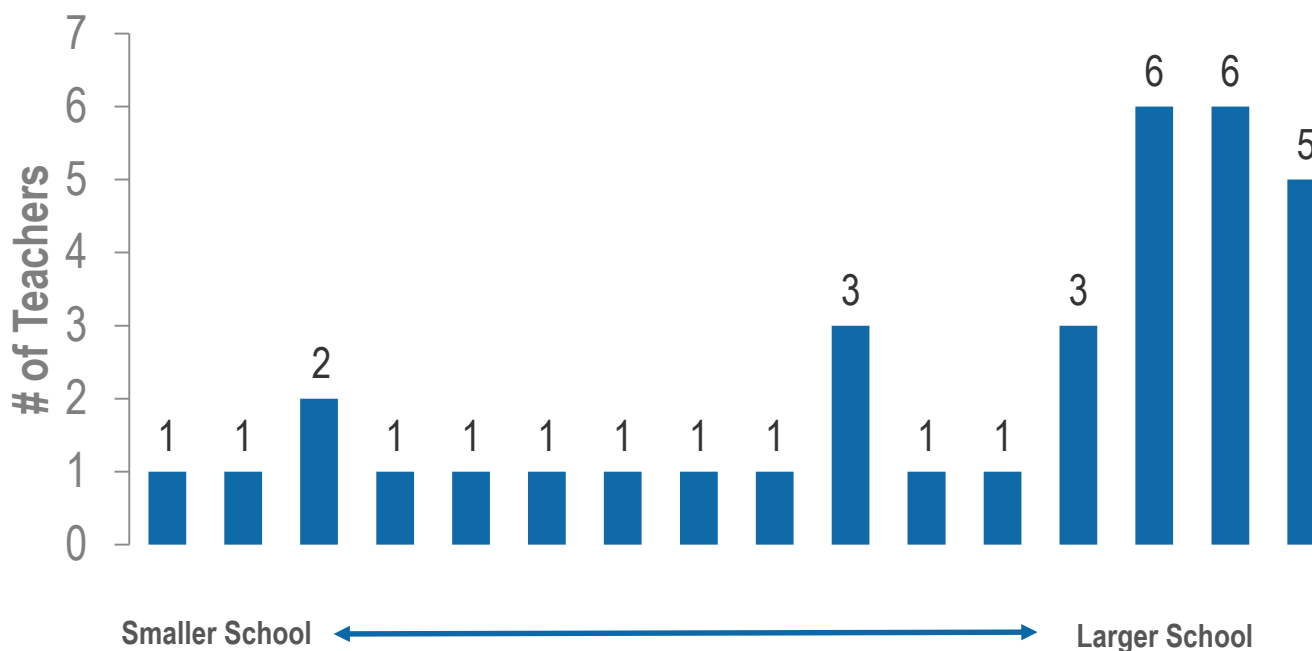
Collaboration between teachers who share content *across schools* is challenging, and requires significant flexibility in scheduling and careful planning

They also tend to require teachers to teach more challenging schedules…

Mr. A
School Enrollment <350

Mr. B
School Enrollment <350
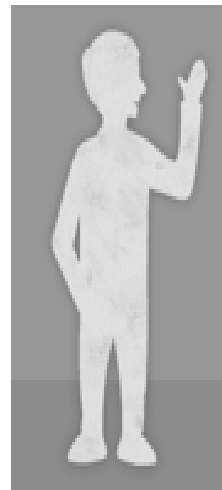
| Art 2 |
| English 1 |
| English 2 |
| English 2 |
| English 2 |

Ms. C
School Enrollment 350+
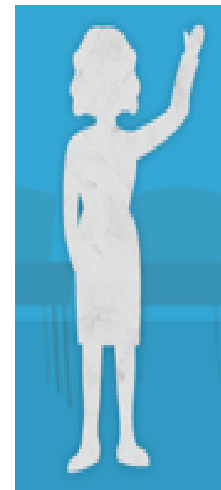
| Biology |
| Biology |
| Biology |
| Biology |
| Biology |

Like Mr. A, 17% of teachers in OUSD's smallest traditional high school cross core content areas*

*Note: 50% of OUSD schools have an average of 3-4 preps per teacher, the other 50% of schools have an average of 2 preps per teacher. ERS defines core content areas as ELA, Math, Science, and Social studies.

Source: OUSD 2014-2015 Course Schedule Data from AERIES

Under-enrolled schools may learn from Oakland Technical's strategically created cross-content Paideia Program

Spotlight: Oakland Technical

Teachers: 104

Students: 1,947

Average Class Size: 23

Average Teacher Load (Core): 113

% of Teachers cross core content: 14%

Teacher Utilization: 83%

- Despite large school size, Oakland Technical has approximately 15% of teachers teaching across core content

- Aligned Paideia program requires higher teacher capacity, but also provides structured opportunities for cross-grade and cross-content planning

- As part of the Paideia program, grades 10-12 have 2-3 hour block integrated courses in English and Social Studies

- All cross content teachers have at least one other teacher with whom they can collaborate during the school day

Source: OUSD 2014-2015 Course Schedule data from AERIES; interviews. See Appendix A for School Reference Sheet.

School Support:

What is the nature of school flexibility and support?

School Support

- *Key Question*
  - What is the nature of school flexibility and support?

- *Summary of Analysis & Insights*
  1. OUSD's theory of action requires school-level autonomy/flexibility over school design; yet less resources are controlled by schools in OUSD relative to comparison districts
  2. Network superintendents supervise a strategically lower number of schools than observed in other districts; their supports are most highly rated by principals

- *Action Implications*
  1. Increase flexibility of dollars attributed to schools
  2. Improve and integrate central supports by organizing around networks with strategic spans of control

OUSD's theory of action requires that schools have flexible resources for schools to create designs based on their instructional model and unique needs

Total Operating Dollars Per Pupil ($PP) by District

Given current funding levels, OUSD would need to budget ~$80M more at schools to match comparison district average
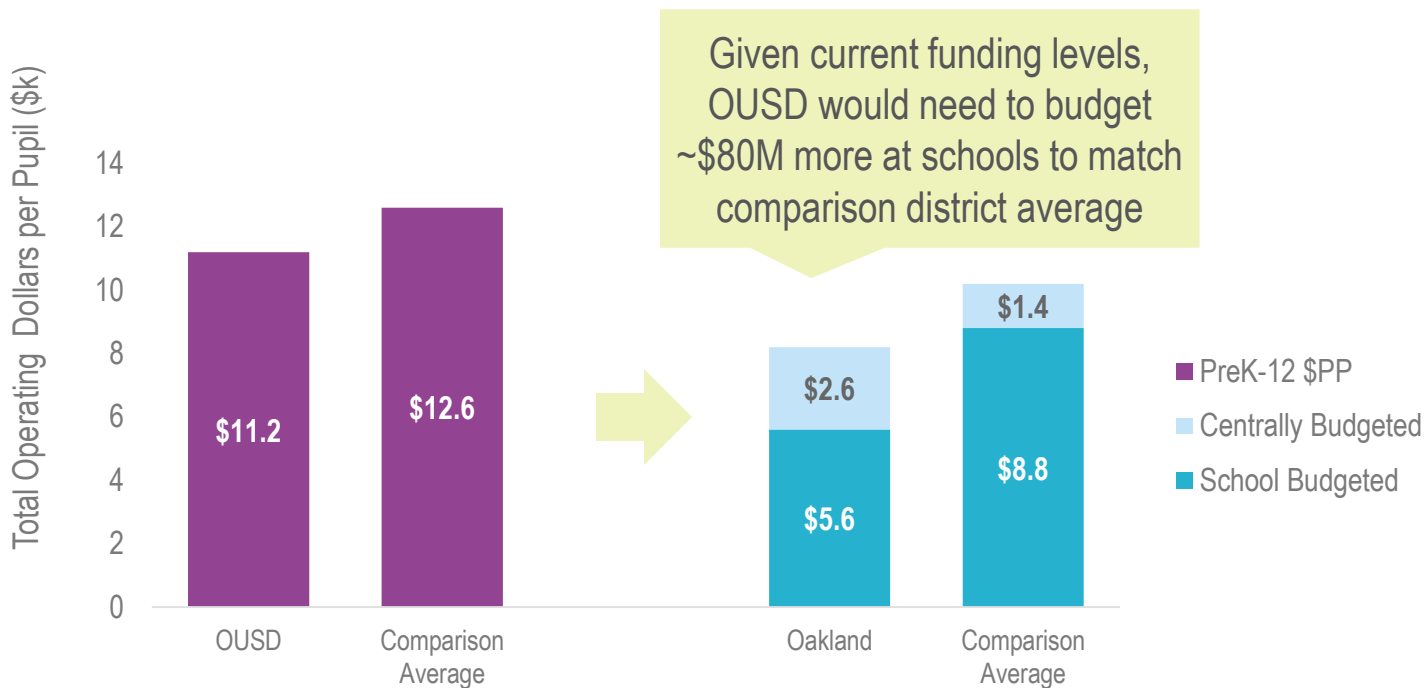
Source: ERS Comparison Database
See appendix for details on comparison districts.
*Adjusted for Geography; Dollar estimate excludes "Untracked Budget Set-Asides" in Baltimore and Cleveland

Effective support to principals is a critical component of OUSD strategy; to understand OUSD's current investments in principal support, our analysis looked at four dimensions of support

For school support to be effective…

| Expectations around school support must be **clear** | Support must be **integrated and coherent** | Support must be provided at the right **frequency** | Support must be **high-quality** |

23% of OUSD principals surveyed reported to be in their first year (2.7x the national average), which suggests that effective school support is critical

Reflecting on the current state of school support in OUSD, 54% of principals expressed a lack of clear expectations

% of Principals Surveyed
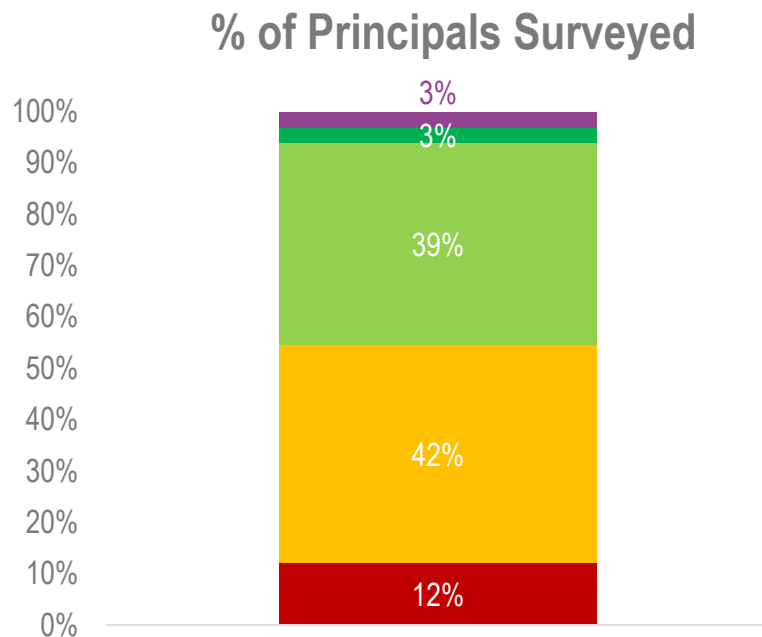
Overall, the district sets clear expectations around the types of supports provided to me centrally.

Chart values (bottom to top): Strongly Disagree 12%, Disagree 42%, Agree 39%, Strongly Agree 3%, Not Sure 3%

■ Strongly Disagree ■ Disagree ■ Agree ■ Strongly Agree ■ Not Sure

"I have no clue what are:
• The goals of each department
• Their service providing orientation
• What I can expect them to help me with
• How they are positioned to further my goals, and
• The feedback measures that rate the department…"

93

…and 68% of principals disagreed with the statement: Supports provided by the district feel integrated and part of a coherent strategy
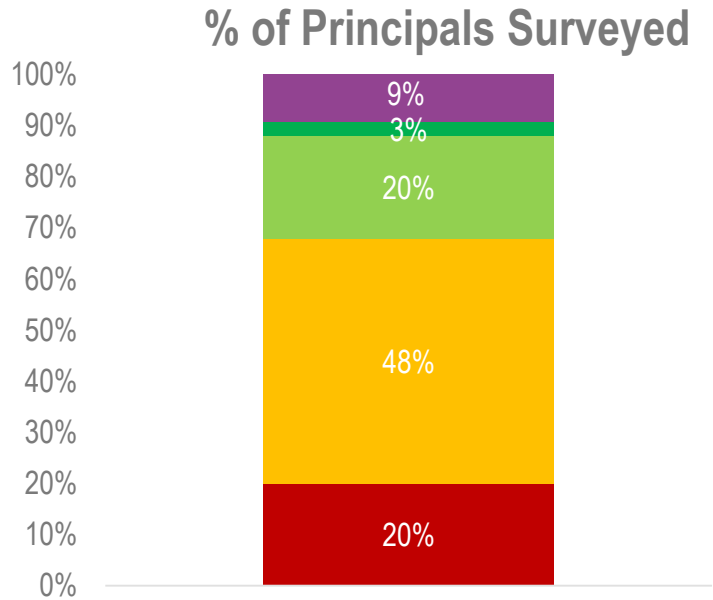
% of Principals Surveyed

The supports provided by the district feel integrated and part of a coherent strategy.

Chart values (bottom to top): 20% Strongly Disagree, 48% Disagree, 20% Agree, 3% Strongly Agree, 9% Not Sure

Legend: ■ Strongly Disagree ■ Disagree ■ Agree ■ Strongly Agree ■ Not Sure

"It feels like there is *no coordination between the different departments*, and it filters down to the school sites as a series of overwhelming asks."

"I need one person**….** Or at least, *we need to know who is your point person* for each thing"

Source: 2015 ERS OUSD Principal Survey. 75% of all principals completed survey with significant representation from each school level.

Overall, there was a relationship between regularly scheduled supports and the sufficiency of those supports

% of Principals Categorizing Support as Sufficient

Category	%
Network Superintendents	75%
Finance/Budget	52%
Community Schools & Student Services	29%
Human Resources	25%
ELL	21%
Teaching & Learning	18%
AAMA	12%
Exceptional Children	6%

■ Regularly Scheduled Supports   ■ Ad Hoc Supports
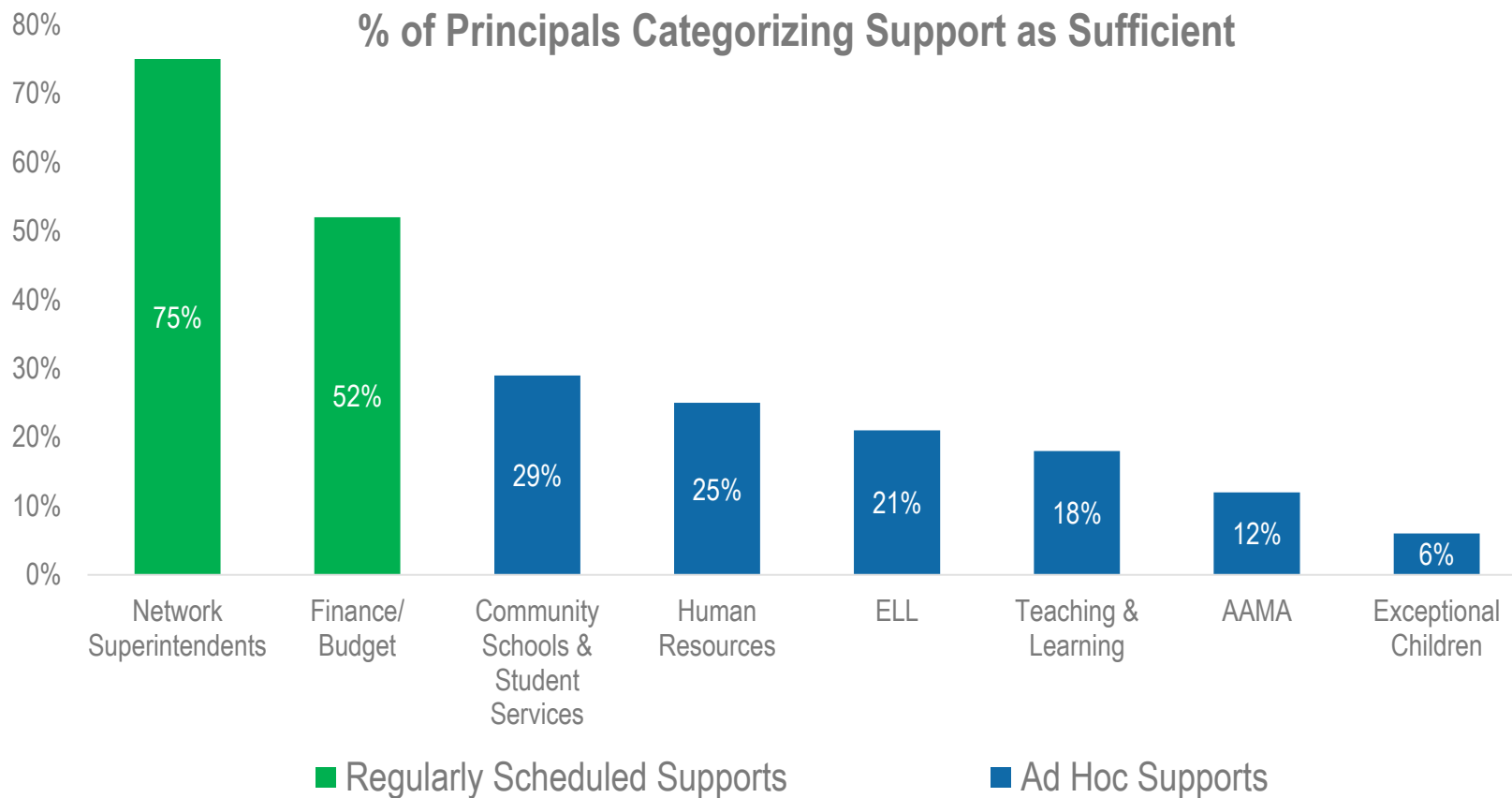
Source: 2015 ERS OUSD Principal Survey.

Note: No schools reporting needing less support from any department. % of Schools is based on response rates to the sufficiency questions. Office of Post-Secondary Readiness was excluded as it has merged with the network support structure.

95

79% of principals spend more than half of their time with Network Supervisors on coaching and content—an indicator of high-quality support and likely connected to the relatively low span of control

Conversations with my supervisor are focused on coaching and content…

Legend:
- ■ Less than 25% of the time (red)
- ■ 25-50% of the time (orange)
- ■ 50-75% of the time (light green)
- ■ More than 75% of the time (green)

% of Principals Surveyed:
- More than 75% of the time: 46%
- 50-75% of the time: 33%
- 25-50% of the time: 12%
- Less than 25% of the time: 9%
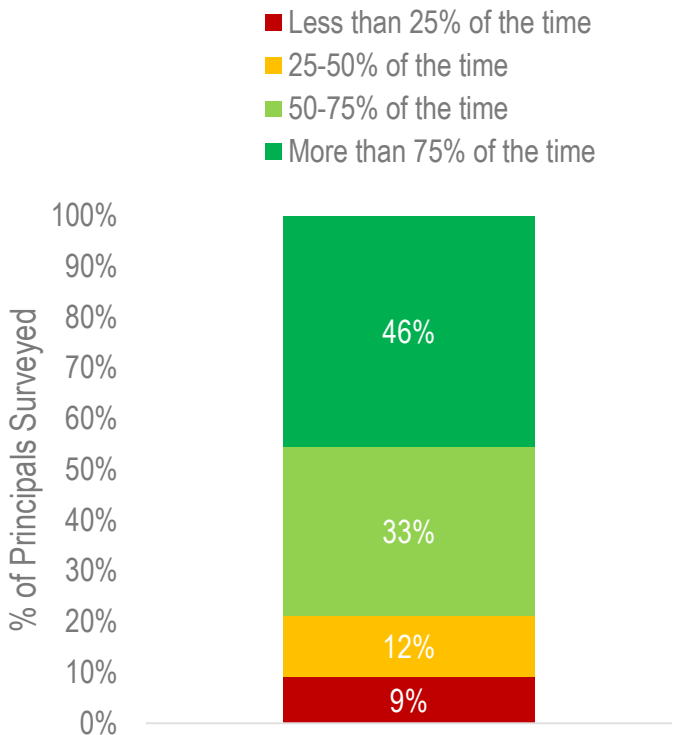
# of Schools per Network Superintendent or Deputy

# of Schools per Instructional Superintendent:
- Austin: 26
- Denver*: 24
- Prince Georges County: 13
- Oakland: 9

ERS Strategic Threshold = 12
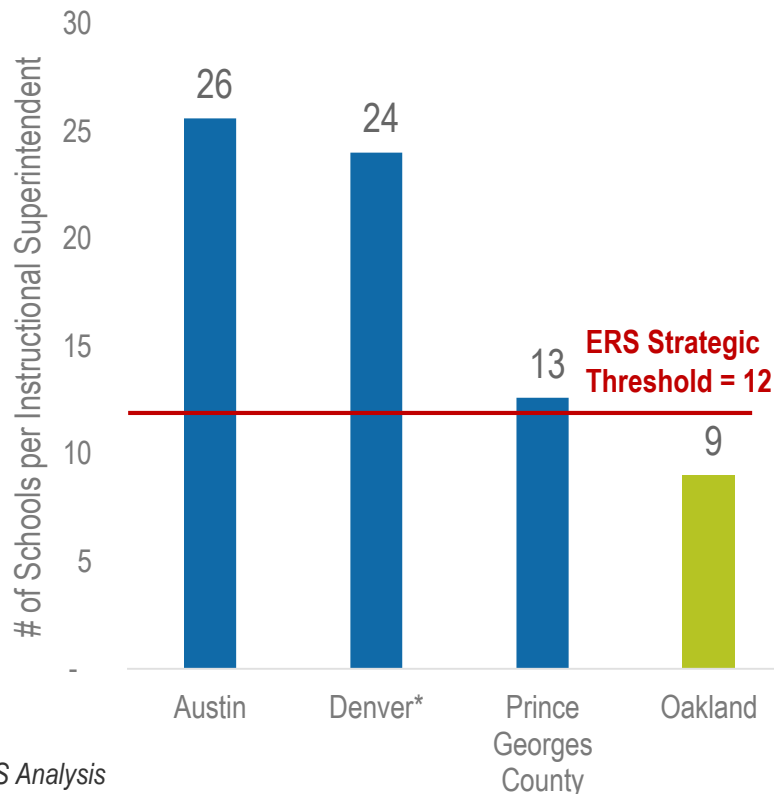
Source: 2015 ERS OUSD Principal Survey; ERS Comparison Database; ERS Analysis

Note: Denver data is from SY 0809 and has since reduced ratio well below ERS's Strategic Threshold

OUSD is in the process of aligning departmental supports to the network structure to improve quality and consistency

"Across the board, my feeling is that we have a lot of **small departments**, that spend a lot of time on vision setting and creating deliverables or even **1-off PDs**. What is **lacking is sustained deeper support** that can create meaningful change at the school site...

We **need departments to fully act 'in service of schools,'** with an orientation that the department exists **to make sure principals and teachers are supported** to be more effective in their jobs."

Appendix A:
About ERS

ERS' Mission

ERS is a **non-profit organization** dedicated to **transforming** how urban school systems organize **resources** (people, time, technology, and money) so that **every school succeeds** for every student.

We have worked with nearly 30 large urban districts and several state education agencies over the last 10 years

Map labels:

Saint Paul

New York

Boston *

Syracuse

Rochester

Providence

Michigan

New Haven, CT

Sacramento

Chicago

Indianapolis *

Cleveland

Philadelphia

New York City

Newark, NJ

Oakland *

Baltimore City *

California

Denver

Cincinnati

Prince George's County, MD

District of Columbia

Los Angeles

Santa Fe

Albuquerque

Tulsa *

Knox County

Nashville

Charlotte-Mecklenburg

Tennessee

Austin

Atlanta

Georgia

Aldine

Duval County

Lake County

Palm Beach County *

Legend:
- District work
- State work
- * Current partner

Georgia Districts
Fulton County
Hall County
Vidalia City
Treutlen County
Marietta City

Our process integrates data analysis with feedback from leaders and stakeholders to provides a robust picture of resource use in the district

Expenditure & Payroll Detail

Student Enrollment & Performance

HR/Position-Level Data

Schools Data

Course Schedules

Student Enrollment

Interviews with District Leaders/Dept Heads

Principal Survey & PAC Focus Group

School Visits

1-1 Board Member Interviews

ANALYSIS

ANALYSIS

Strategic Resource Map

Funding

School Design

Teaching

School Support

OUSD ERS Team Members

Jonathan Travers, Partner
Expertise: District Strategy & Strategic Resource Use
District Experience: Cleveland, Charlotte, Denver, D.C., Atlanta, Boston, Philadelphia, Sacramento, Jacksonville, LAUSD

Joseph Trawick-Smith, Manager
Expertise: Policy & Portfolio
District Experience: State DOE of Georgia, State DOE of New York, Buffalo, Denver, Fulton GA

Nisha Garg, Principal Associate
Expertise: School Design
District Experience: Nashville, Charlotte, Boston, State DOE of Georgia, State DOE of Tennessee

Shana Wang, Associate
Expertise: School Funding Systems
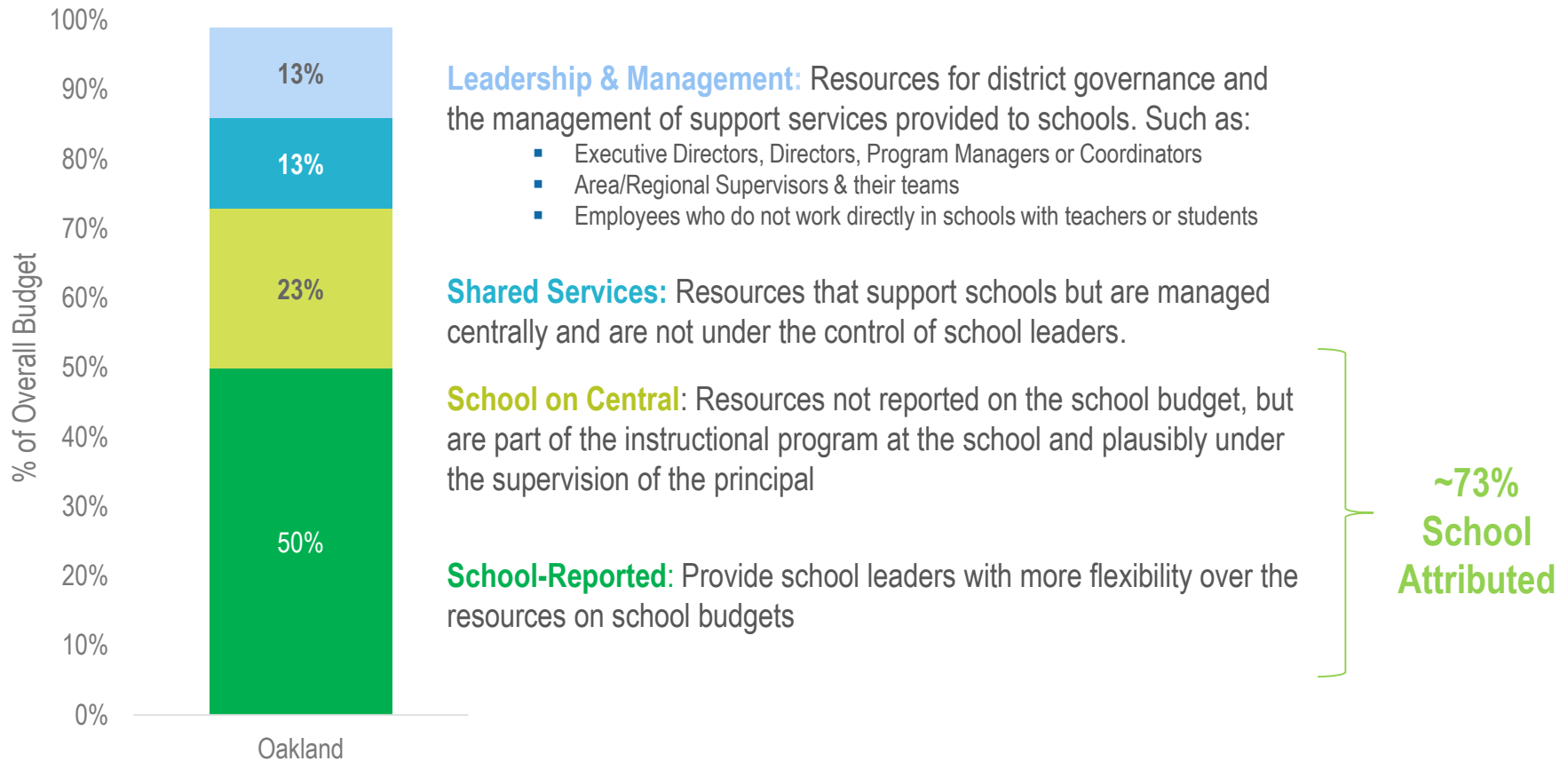District Experience: Cleveland, Boston

Bruck Kebede, Education Pioneers Analyst Fellow
Expertise: Data Analysis

Appendix B:

Glossary of Terms

To compare the *nature* of district spending, ERS defines *Sharing Levels*: Categories that describe where resources are used and how they are managed, and these levels are applied across all districts with whom we partner

% of Operating Budget ($416M) by Sharing Level

Leadership & Management: Resources for district governance and the management of support services provided to schools. Such as:
- Executive Directors, Directors, Program Managers or Coordinators
- Area/Regional Supervisors & their teams
- Employees who do not work directly in schools with teachers or students

Shared Services: Resources that support schools but are managed centrally and are not under the control of school leaders.

School on Central: Resources not reported on the school budget, but are part of the instructional program at the school and plausibly under the supervision of the principal

School-Reported: Provide school leaders with more flexibility over the resources on school budgets

~73% School Attributed

Chart values (Oakland):
- 13% (light blue)
- 13% (teal)
- 23% (yellow-green)
- 50% (green)

Y-axis: % of Overall Budget (0% – 100%)

To analyze district resource use, ERS applies a comparative coding framework that enables cross-district comparisons

Use →

Instruction

Function

- Teacher Compensation
- Aides Compensation
- Substitute Compensation
- Librarian & Media Specialist
- Instructional Materials & Supplies
- Other Non-Compensation
- Other Compensation
- Extended Time & Tutoring

Pupil Services & Enrichment

- Enrichment
- Social Emotional
- Physical Health Services & Therapies
- Career Academic Counseling
- Parent & Community Relations

Instruction Support & Prof. Dev.

- Professional Development
- Curriculum Development
- Recruitment(of Instructional Staff)
- Special Population Program Management & Support

Leadership

- Governance
- School Supervision
- School Administration
- Research & Accountability
- Communications
- Student Assignment

Operations & Maintenance

- Facilities & Maintenance
- Security & Safety
- Food Services
- Student Transportation
- Utilities

Business Services

- Human Resources
- Finance, Budget, Purchasing, Distribution
- Data Processing & Information Services
- Facilities Planning
- Development & Fundraising
- Legal
- Insurance

105

Note: Functions defined as *central spending* from California Department of Education's "Unaudited Actual Financial Datasets"

Instructional Supervision and Administration, Enterprise, Centralized Data Processing, Other General Administration, In-house Instructional Staff Development, Personnel/Human Resources Services, All Other General Administration, Warehousing and Distribution, Purchasing, Pupil Testing Services, Payroll, Curriculum Development, Financial Accounting, Printing, Publishing & Duplicating, Budgeting, Public Information, Planning, Research, Development & Evaluation, Other Personnel/Human Resources Services, Accounts Payable, Administrative Unit of a Multidistrict SELPA, Central Support, Project-Specific Accounting, Other Fiscal Services, Internal Auditing, Property Accounting, Accounts Receivable, General Administration Cost Transfers

Scholastic Reading Inventory
SRI Lexile Scores for Grade Level Performance

Scholastic Reading Inventory (SRI), Lexiles by Grade

Grade	Below Grade Level[1]	At Grade Level[1]	Above Grade Level[1]	College & Career Ready Expectations[2]
1	99 and Below	100-299	300 and Above	N/A
2	299 and Below	300-499	500 and Above	450-790
3	499 and Below	500-599	600 and Above	450-790
4	599 and Below	600-699	700 and Above	770-980
5	699 and Below	700-799	800 and Above	770-980
6	799 and Below	800-849	850 and Above	955-1155
7	849 and Below	850-899	900 and Above	955-1155
8	899 and Below	900-999	1000 and Above	955-1155
9	999 and Below	1000-1024	1025 and Above	1080-1305
10	1024 and Below	1025-1049	1050 and Above	1080-1305
11	1049 and Below	1050-1300	1301 and Above	1215-1355

NOTE: *By the end of the 11th grade*, students should reach the *college- and career-ready* reading level (1300 Lexiles). For this reason, grade level performance is not defined for 12th graders.

Lexile Scores for Grade Level Performance

The width of the bar varies by the size of the numeric range for the grade level band. For example, Grade 3 has a 100 point range, and is half the width of Grade 2, which has a 200 point range.

Gr 9 1000-1024

Gr 10 1025-1049

[1]Scholastic Inc. (2007). Scholastic Reading Inventory Technical Guide. New York: Scholastic Inc. Education Group.
[2]National Governors Association Center for Best Practices, Council of Chief State School Officers. (2010). Common Core State Standards (English Language Arts, Appendix A). Washington, D.C.: National Governors Association Center for Best Practices, Council of Chief State School Officers.

Appendix C:

Supplementary Materials

Which districts has ERS included in its cross-district comparisons?

| District	Enrollment	PreK-12 Operating $PP (Adjusted)	%FRL[1]	%ELL[2]	%SWD[3]	Avg. School Size	Regional Cost Adjust.*	2013 HS Grad. Rate
Prince George's County	123,476	$11,197	60%	13%	9%	611	1.1	74%
Austin	86,512	$10,563	63%	27%	10%	676	0.9	84%
Baltimore	83,800	$15,808	77%	3%	15%	439	0.9	86%
Denver	76,884	$10,525	79%	27%	11%	620	0.9	61%
Cleveland	40,072	$16,549	100%	7%	19%	304	0.8	64%
Hall County, GA	25,939	$11,017	58%	14%	10%	786	0.8	78%
Oakland	**37,147**	**$11,197**	**73%**	**31%**	**10%**	**432**	**1.0**	**63%**
Comparison Average	**72,781**	**$12,589**	**73%**	**15%**	**12%**	**573**	**0.9**	**75%**

[1] *Free & Reduced Lunch*
[2] *English Language Learners*
[3] *Students With Disabilities*
Lower numbers represent a lower regional cost of living

Lower spend on schools and instruction is offset by a relatively high spend on OUSD's central office

Central Office Expenditure
($ Per Pupil)
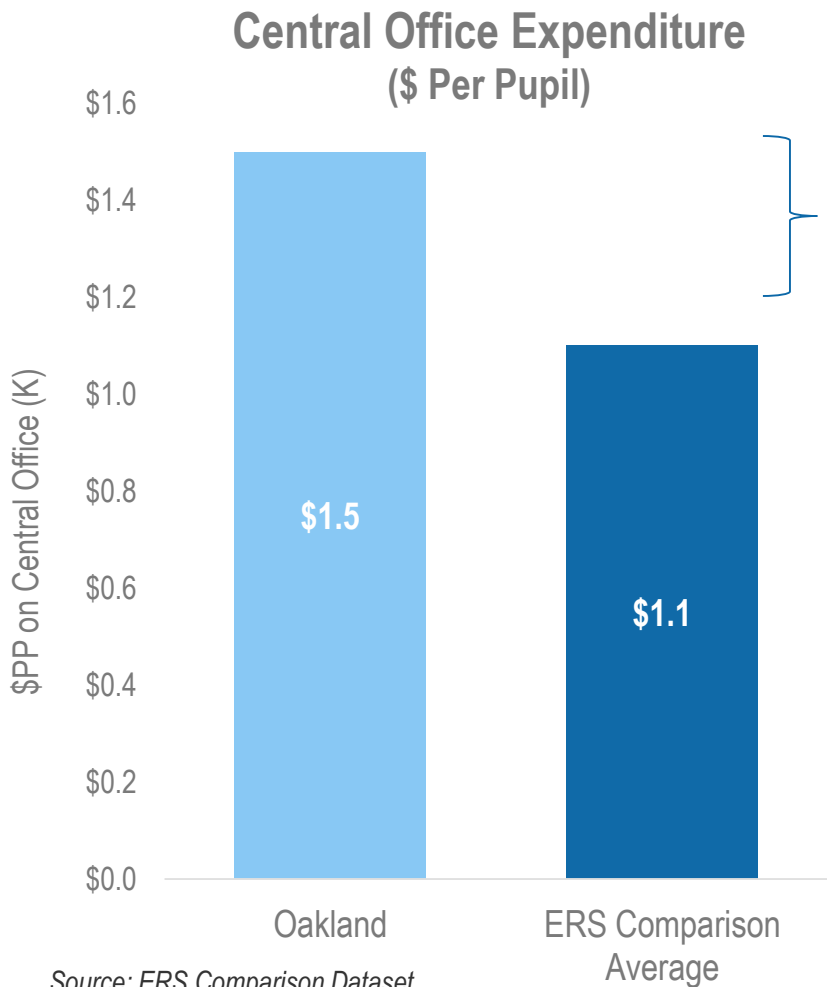
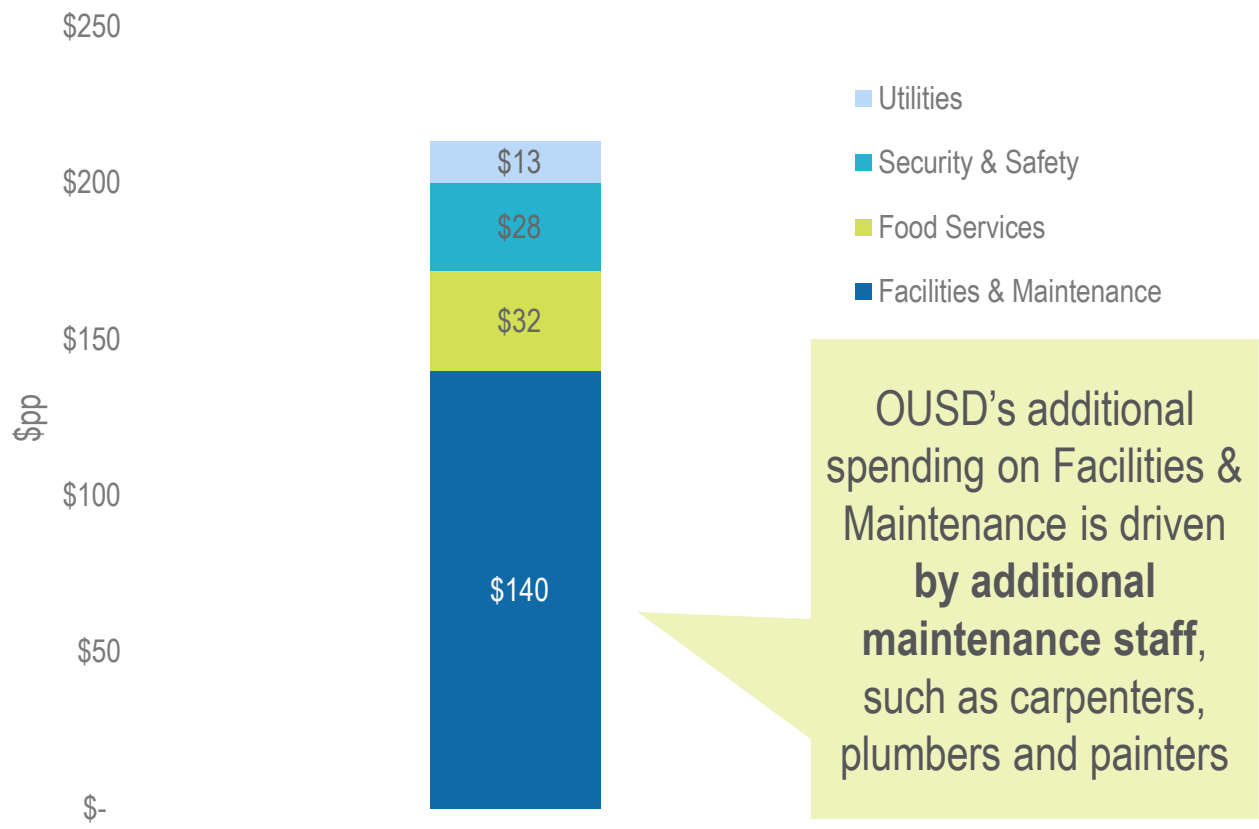**Contributing factors for the additional $349 per pupil centrally include:**

1) **Benefits cost 50% more** per FTE

2) **120 more central FTEs** than in comparisons to serve a district of OUSD's size (370 FTEs in OUSD)

3) **~2x FTEs upper-level positions*,** though within each position level **salaries are lower** than comparisons

Source: ERS Comparison Dataset

Incudes Superintendent, Chiefs, Executive Directors, Directors, Network Superintendents, and Deputy Superintendent positions

110

Higher Shared Services *Operations & Maintenance (O&M)* spending is largely the result of more maintenance staff than we would expect, given OUSD's enrollment

Breakdown of Additional per Pupil Spending
on O&M Shared Services

$pp

Legend:
- Utilities
- Security & Safety
- Food Services
- Facilities & Maintenance

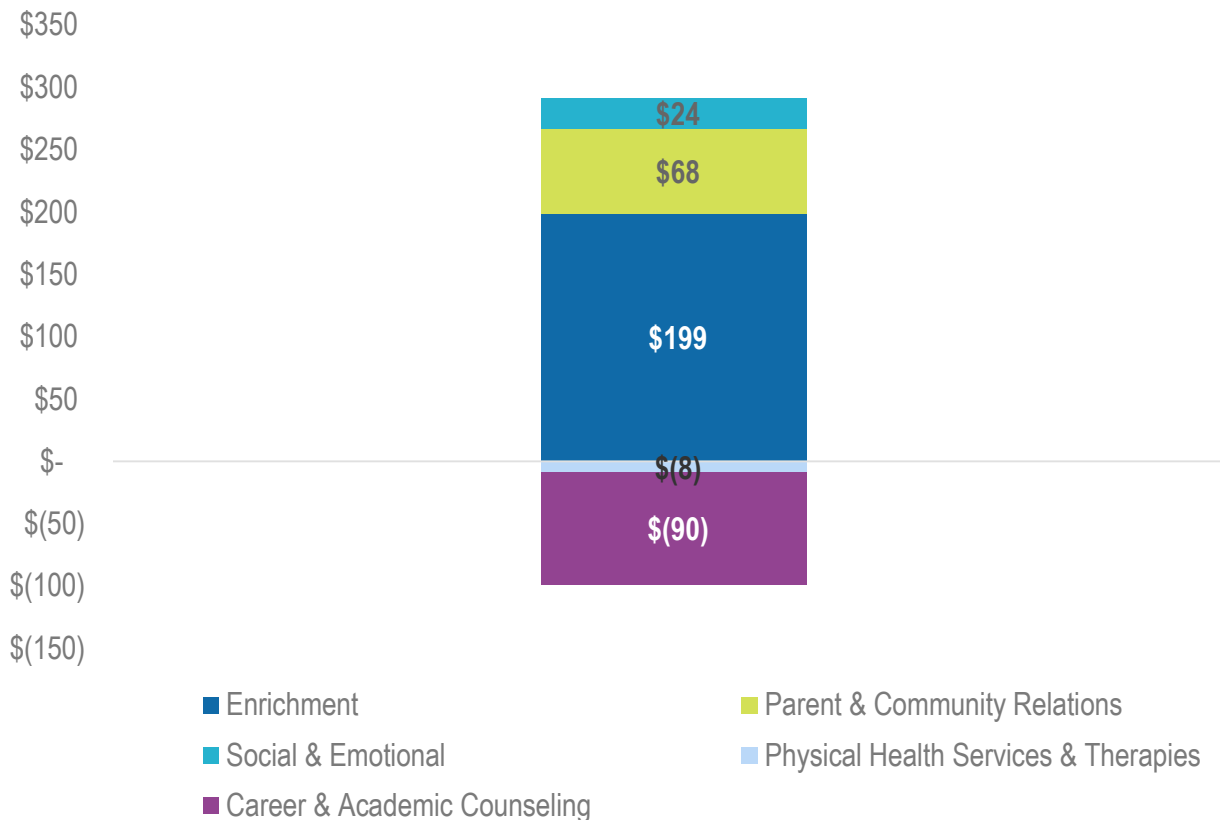Chart values (bottom to top): $140, $32, $28, $13

OUSD's additional spending on Facilities & Maintenance is driven **by additional maintenance staff**, such as carpenters, plumbers and painters

Additional O&M spending equates to ~**$7.9M**

Source: OUSD SY14-15 Expenditure Data.

Higher school-attributed Pupil Services spending is the result of higher spending on *Enrichment and Parent & Community,* with only a small additional investment in *Social & Emotional*

Legend:
- Enrichment
- Parent & Community Relations
- Social & Emotional
- Physical Health Services & Therapies
- Career & Academic Counseling

Source: OUSD SY14-15 Expenditure Data.

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OUSD's central* spending relative to other CA districts
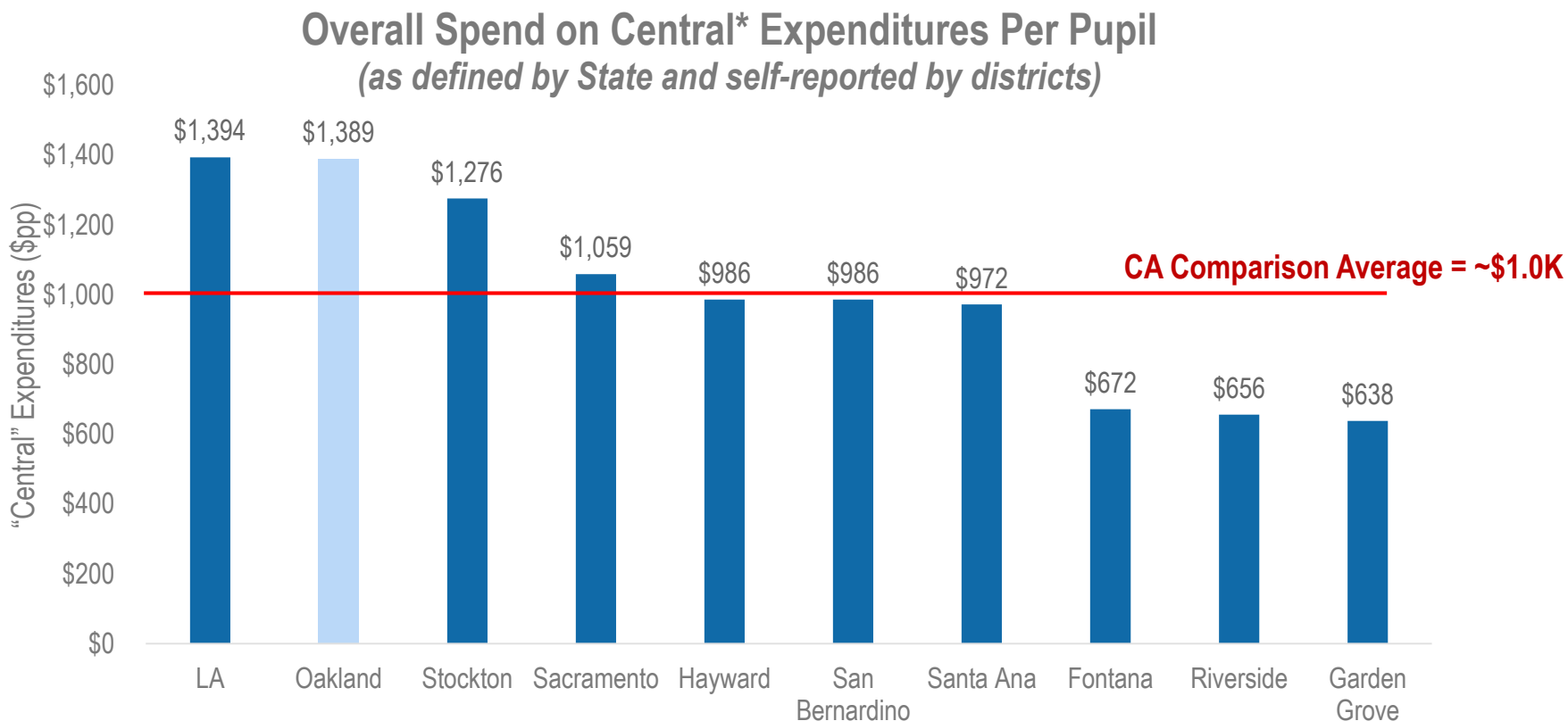
Overall Spend on Central* Expenditures Per Pupil
(as defined by State and self-reported by districts)

CA Comparison Average = ~$1.0K

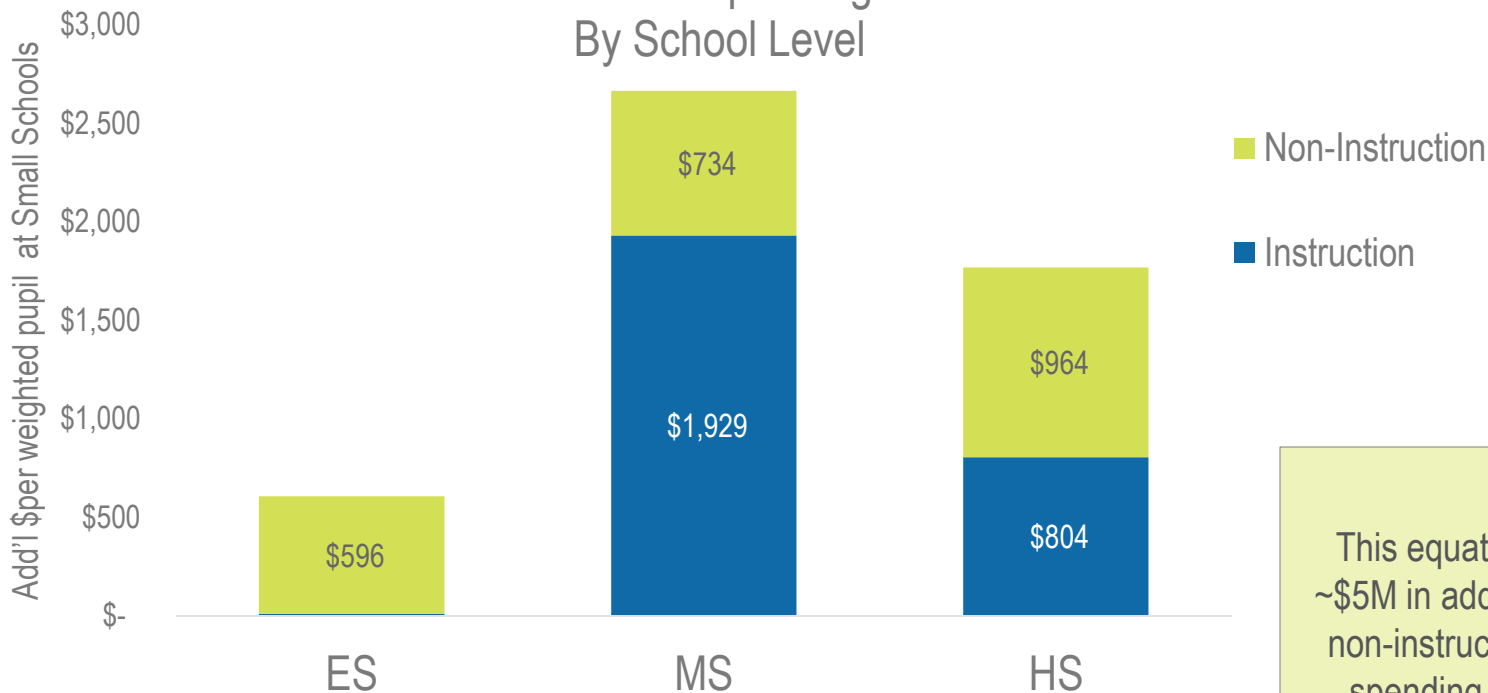|	LA	Oakland	Stockton	Sacramento	Hayward	San Bernardino	Santa Ana	Fontana	Riverside	Garden Grove
Per Pupil (chart)	$1,394	$1,389	$1,276	$1,059	$986	$986	$972	$672	$656	$638
Total $PP	$16,703	$13,154	$11,267	$10,604	$10,595	$11,164	$12,370	$9,158	$9,161	$12,369
% on Central	8.3%	10.6%	11.3%	8.6%	9.3%	8.8%	9.2%	7.3%	7.2%	5.2%

Source: Analysis of CDE Data, 13-14

San Francisco Unified has been excluded due to issues with data consistency

*See Appendix for definition of "Central" expenditures

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Additional spending on low-enrolled schools is comprised of both Instructional and non-Instructional spending

Breakdown of Additional Spending at Small Schools By School Level

Legend:
- Non-Instruction
- Instruction

Bar values:
- ES: Non-Instruction $596
- MS: Instruction $1,929; Non-Instruction $734
- HS: Instruction $804; Non-Instruction $964

	ES	MS	HS
# of Schools	17	4	5
# of Students	5.2K	1.2K	1.1K
School "Size Premium"	$3.2M	$2.3M	$2.0M

This equates to ~$5M in additional non-instructional spending and ~$2.4M in additional instructional spending

*Size Premium refers to the additional dollars associated with per pupil spending in low-enrolled schools as compared to district average.*

Source: OUSD SY14-15 Expenditure Data.

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Meanwhile, $2.4M of the higher spend on low-enrolled schools is Instructional, driven by higher average teacher costs at MS and additional FTEs at HS
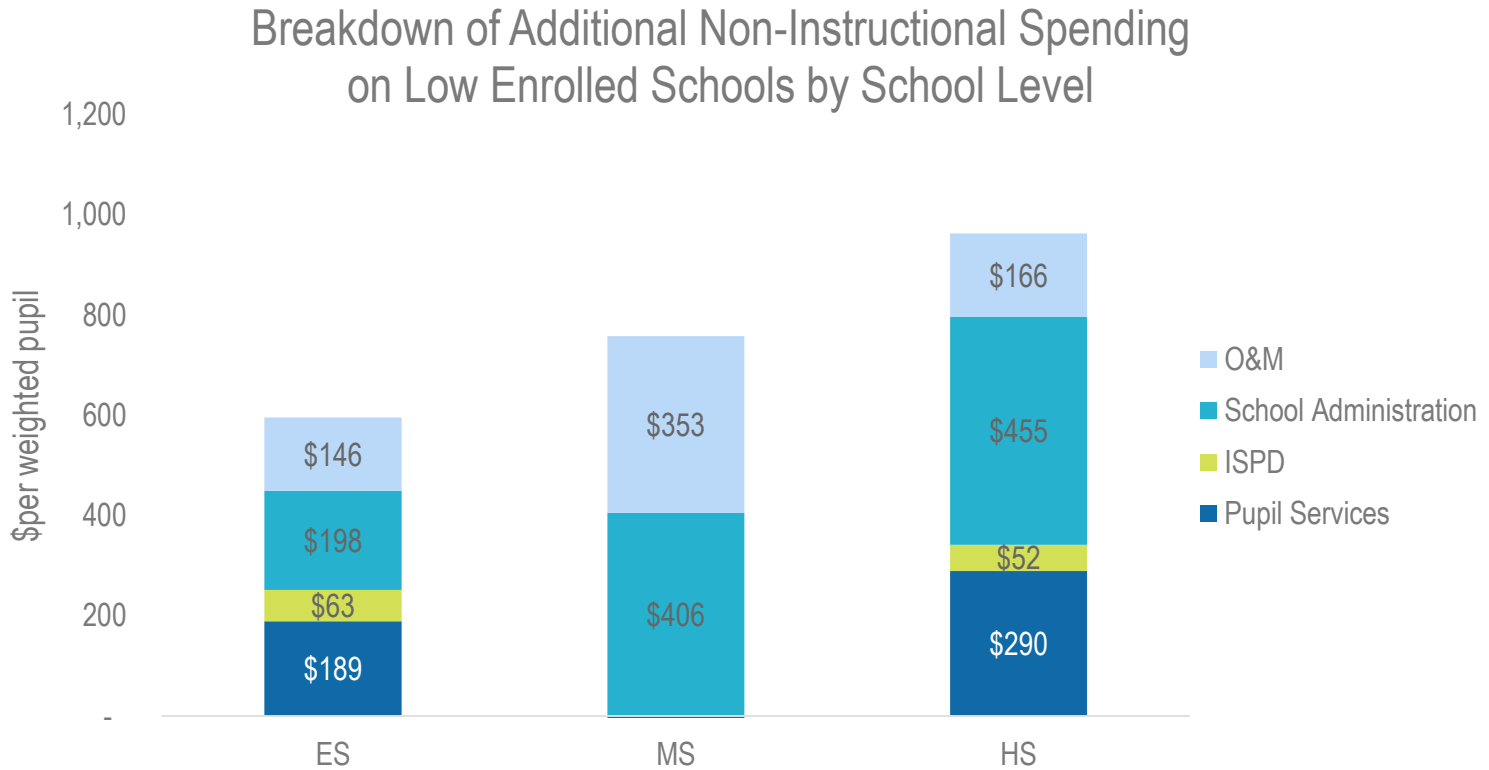

Student-to-Teacher Ratio by School Size Bucket

■ <350 Students   ■ 350+ Students

$per weighted pupil
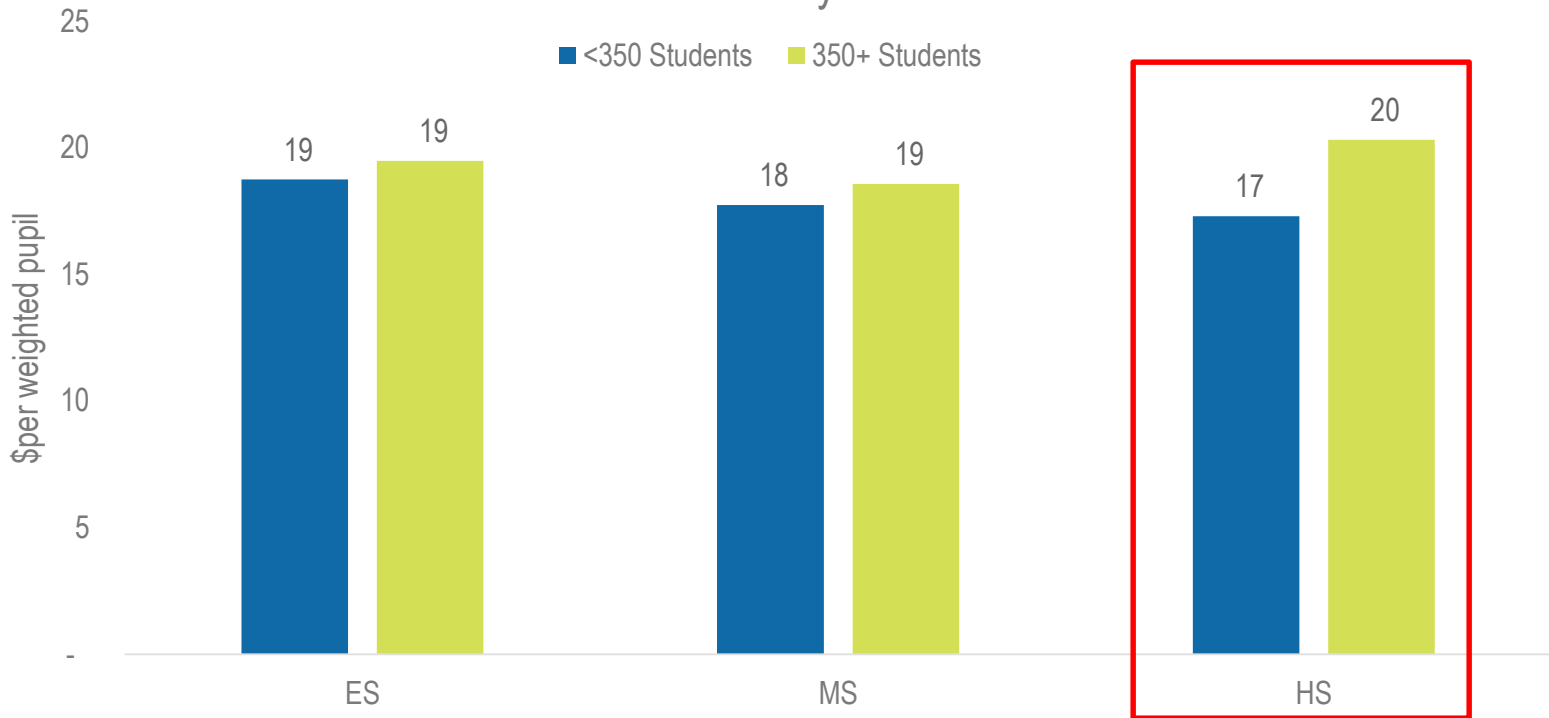
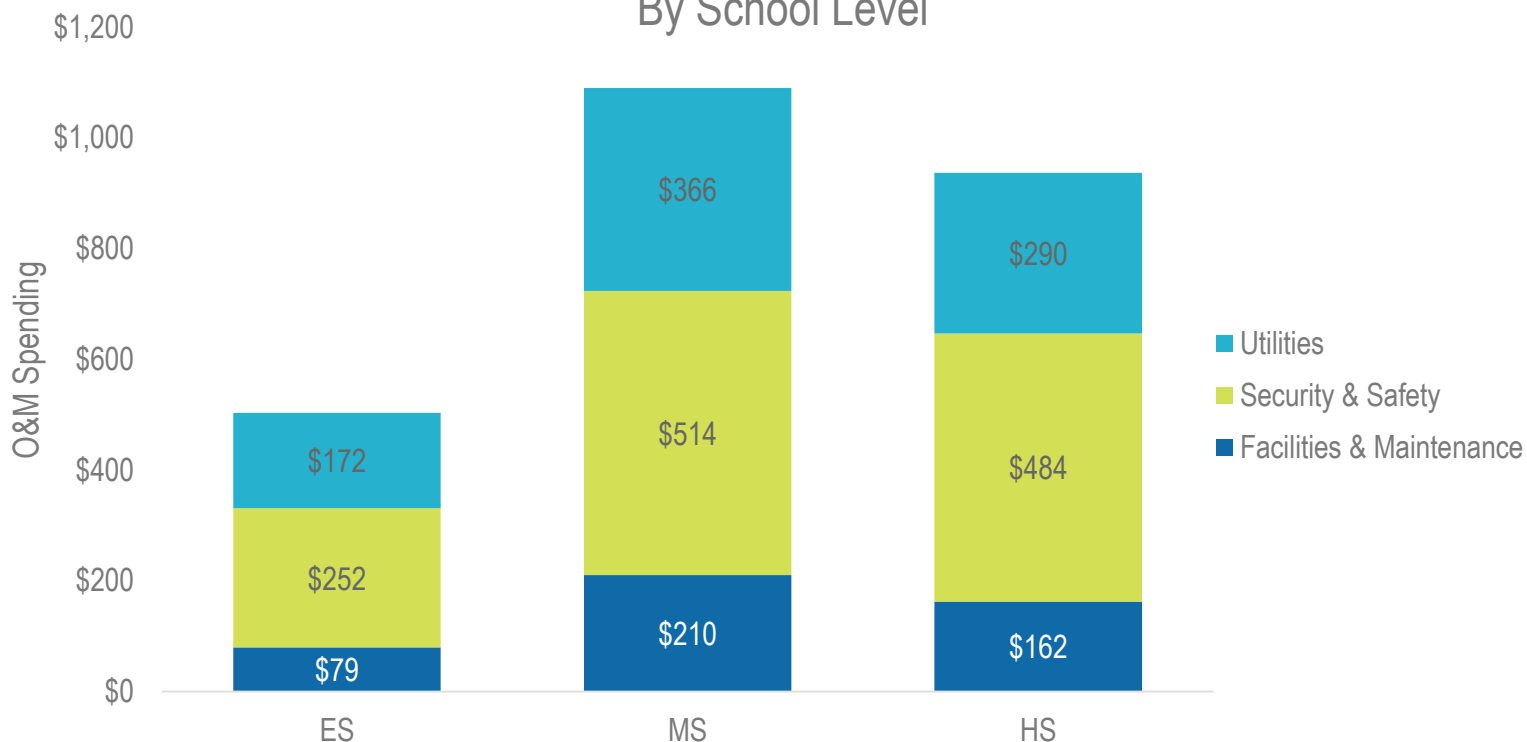|	ES		MS		HS	
	<350	350+	<350	350+	<350	350+
Ratio	19	19	18	19	17	20
Avg. Teacher Compensation	$78K	$79K	$78K	$74K	$74K	$77K
Teacher $pwp	$4.1K	$4.2K	$4.4K	$3.8K	$4.7K	3.9K

Source: OUSD SY14-15 Expenditure Data

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Across school levels, non-Instructional spending is comprised of O&M and School Admin, with ES and HS also spending more on Pupil Services

Breakdown of Additional Non-Instructional Spending on Low Enrolled Schools by School Level

Legend:
- O&M
- School Administration
- ISPD
- Pupil Services

Y-axis: $per weighted pupil

ES: Pupil Services $189, ISPD $63, School Administration $198, O&M $146
MS: School Administration $406, O&M $353
HS: Pupil Services $290, ISPD $52, School Administration $455, O&M $166

Additional spending on O&M and School Admin equates to $1.5M for MS and HS and $1.8M for ES

Source: OUSD SY14-15 Expenditure Data.

Higher O&M spending may stem from more square footage per pupil at low-enrolled schools

Breakdown of Additional O&M Spending at Low-enrolled Schools
By School Level

% Add'l Square Footage pp at Low-enrolled Schools	40%	60%	90%
	ES	MS	HS

Source: OUSD SY14-15 Expenditure Data.

OUSD spending weights by school level relative to comparison district

Spending weights by school level:

District	Elementary School	Middle School	High School
OUSD	**0.95**	**1.07**	**1.11**
Peer Average	**1.00**	**1.00**	**1.02**
Austin	0.93	1.07	1.12
Hall County, GA	1.01	0.98	0.99
Prince George's County	1.05	1.01	0.88
Baltimore	1.05	0.91	0.97
Cleveland	0.96	0.96	1.09
Denver	0.98	1.08	1.06

Weights calculated as School Attributed Dollars per Weighted Pupil by school level divided by district average Dollars per Weighted Pupil
Source: OUSD SY14-15 Expenditure Data; ERS Analysis, ERS Comparison Database

OEA/OUSD *Contract Agreement 2012-2013 Language*

### 15.5   Categories - Secondary Schools - Maximum Class Sizes

Basic Program	Maximum Pupil Contact Per Day Class Size
English	32 x 5 = 160
Foreign Language	32 x 5 = 160
Mathematics	32 x 5 = 160
Social Science	32 x 5 = 160
Non-Lab Science	32 x 5 = 160
Lab Science	31 x 5 = 155
Business Education (word processing)	Available Work Area or 34 x 5 = 170
Business Education (Other)	33 x 5 = 165
Industrial Arts	Available Work Area
Homemaking	29 x 5 = 145
Music	52 x 5 = 260
Physical Education	52 x 5 = 260
Arts - Crafts	27 x 5 = 135
Arts - Fine	30 x 5 = 150
ROTC	35 x 5 = 175

- In the secondary schools, exclusive of adult education classes, the total student contact per day is based on five (5) periods at the maximum class size times five (5). An individual period may exceed the maximum per period stated in Section 15.5 above by three (3) students - provided that total student contact per day does not exceed the stated maximums in item Section 15.5 above.

- Source: https://sites.google.com/a/oaklandea.org/oea/contract, page 82-83

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Teacher schedules do not align to allow for common planning time

Share of 6th grade Math Teachers by Number of Shared Non-Classroom Periods

- ■ No Periods
- ■ 1 Period
- ■ 2 Periods

7%
42%
51%
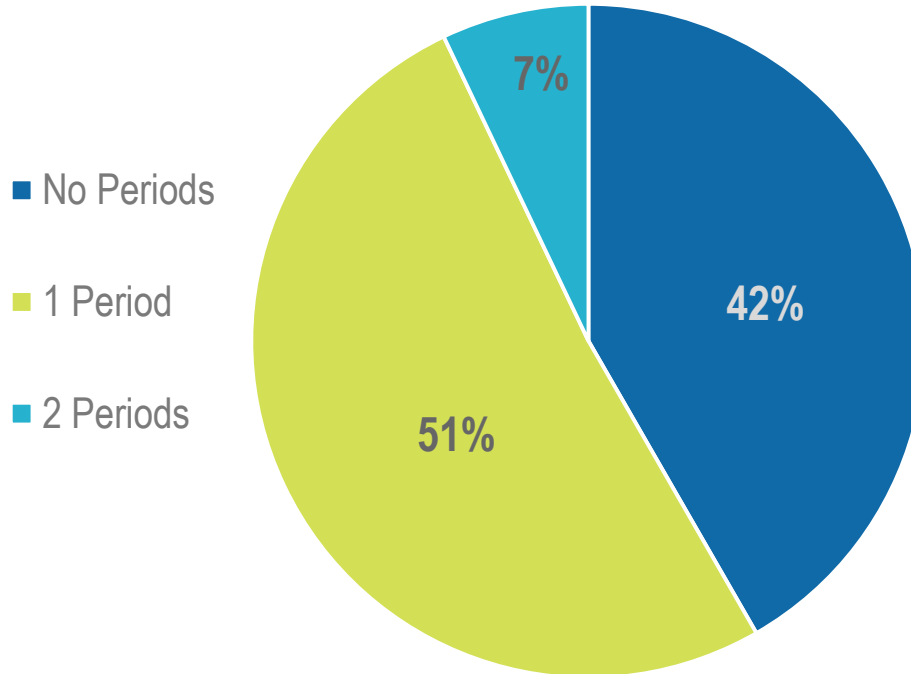
When we look at 6th grade math teachers' potential to collaborate cross-grade with other MS math teachers, 27% continue to have no periods, while 61% and 12% of teachers have 1 and 2 periods respectively.

Note: Accounts for mixed-grade teachers.
Source: OUSD 2014-2015 Course Schedule Data from AERIES.