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OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Memo

To Board of Education

From Kyla Johnson-Trammell, Superintendent
Yvette Renteria, Deputy Chief of Innovation

Board Meeting Date September 11, 2019

Subject Answers to Board Director Questions Regarding Blueprint for Quality Schools Cohort 2

Action The purpose of this memo is to address questions from the Board of Directors regarding Blueprint for Quality Schools Cohort 2 Proposals.

Background On August 28, staff presented a first read of recommended proposals for Blueprint for Quality Schools Cohort 2 school changes. They are as follows: merge Frick and School of Language (SOL) on Frick campus; expand Melrose Leadership Academy (MLA) on the Sherman and Maxwell Park campuses; merge the Kaiser and Sankofa programs at the Sankofa campus; and implement a Quality Program Design Year for Fruitvale Elementary. These recommendations utilized input from internal and external stakeholders and were grounded in our guiding principles.

During the subsequent discussion, the Board of Directors asked staff to prepare responses to the following questions:

- **Approximately how many under-enrolled schools do we currently have?**
- **How does the District compensate for significantly under-enrolled schools? What are the implications given the number of under-enrolled schools?**
- **What does support look like for the design year, how do things look better for kids?**
- **How do the Sankofa vs. Santa Fe campuses compare?**
- **Can we do a deeper analysis of the enrollment impact around the North Oakland school changes?**
- **What does a phase-out of Kaiser look like?**

Discussion

Approximately how many under-enrolled schools do we currently have?

For purposes of this question, "under-enrolled school" means that there are not enough students enrolled at a school to pay for the mandatory number of staff members.

In 2017-18, there were 23 under-enrolled Oakland Unified School District (District) schools that could not pay for their base program. This is a bare bones program. Of these, there were 13 elementary schools, six middle schools, and two high schools. It is important to note that Cohort I addressed three of these schools when Alliance and Elmurst Community Prep were merged, Roots was closed, and MetWest started the expansion process. This means there are two fewer under-enrolled middle schools and MetWest will expand to a sustainable size.

Financial model: The District created a financial model to help determine the number of students required at a given school site to fund different staffing levels. Two of the staffing levels it examined were "Base" and "Base Plus."

- Base: This is the bare minimum number of staff required to keep a school open.
- Base Plus: This is the base plus funding for two additional staff members to assist in the implementation of a community school.

The goal was to set the minimum number of students in a school, explore our future goals for staffing, and help the District make more deliberate and strategic decisions focused on both academic quality and financial sustainability. This model relies on a number of key assumptions. Importantly, it accounts only for state base and supplemental/concentration revenues (no restricted funds), and assumes the current staffing requirements and staff compensation levels.

Applying the financial model: California provides the District with a different amount of money per student at the elementary, middle, and high school levels. From that amount, the model subtracts the District's overall fixed costs (per labor contracts, board policies, special education, state loan, etc). After paying for these costs, the amount remaining is the funding available per student to support direct site budgets:

- Elementary: $5,865
- Middle: $5,918
- High: $7,235

Based on this per student revenue, the financial model can determine the minimum number of students required to pay for the Base Program and the Base Plus Program.

	Student Enrollment needed for Base (meets state/federal/contractual obligations)	**Student Enrollment needed for Base Plus** (includes Base Plus 2 additional staff members for supports and services such as Restorative Justice, family liaison, reading intervention teacher)

Elementary	304	397
Middle	381	645
High	519	585

Schools with enrollment under the Base and Base Plus Threshold (2017/18 Data)

	Schools with enrollment less than **Base threshold**	Schools with enrollment less than **Base Plus threshold**
Elementary	13	31
Middle	8	12
High	2	2
Total	**23**	**45**

How does the District compensate for significantly under-enrolled schools? What are the implications given the number of under-enrolled schools?

Schools receive their staff and funding through the District's site funding formula. Under this formula--based on the number of students and grade levels--each school receives staff, and discretionary funding, etc. For example, a school with 268 students and a school with 400 students will receive different staff and funding levels.

However, both schools will have a set of common fixed costs for things such as a principal, attendance clerk, front office administrative staff, custodial services, utilities, buildings & grounds costs, noon supervisor(s), cafeteria staff, etc., regardless of the size of the student enrollment and per pupil allocation. Because of these fixed costs, it is more expensive on a per pupil basis to run the smaller of the two schools.

When a school is under-enrolled, the money to pay for the school's base program has to come from somewhere else. That means that other schools will receive less per pupil discretionary funding or see reductions to services at school sites. There are some under-enrolled schools that receive more money than other schools just to cover the base program.

Under the base financial model (previously shared with the Board), the estimated impact of having under-enrolled schools in the District is approximately $18.8 million. If that amount of money was made available to schools through the funding formula on a per pupil basis (with 36,286 District students) it would result in an additional $518 per student in funding.

What does support look like for the design year, how do things look better for kids?

We support design teams through a process to be creative and establish a vision for their school community. Working together and building on the assets each school community brings to the process, we will expand quality options and improve student outcomes. To do so, we guide the

design teams through four modules. For each module, the design teams will work through a series of sessions that involve professional development training, personalized coaching, and opportunities to collaborate.

Equity is embedded throughout the process and informs our approach to all topics such as establishing a vision. We work with the design leaders to build design teams that involve stakeholders for each school to ensure that all communities experience equity of voice and representation. The design sequence will merge the programs to create a new, intentional community.

We work closely with design team leaders and are implementing a check-in process that will help us identify specific challenges and make adjustments to meet the needs of specific design teams as we progress through the year.

At a high level, during the four modules the design teams will:

1. **Review Assets/Challenges and Redesign Priorities/Goals**: During this module, teams will look through the current school conditions and identify the assets and priorities that lead to a successful and thriving program.
2. **Adopt a Mission/Vision/Graduate Profile:** During this module, we align the assets of the school with the vision and mission to understand the direction and priorities. We do this with a lens towards equity, quality and sustainability.
3. **Design an Instructional Program (Standards Based Curriculum, Instruction, & Assessment):** During this module, we focus on the academic program aligned to the school's mission and vision.
4. **Establish Operations & Systems:** During this module, we focus on putting systems in place to build the vision and mission that was set out from the design team. A plan is put in place to implement the design.

Alignment and support from District departments: The Office of Equity, English Language Learner and Multilingual Achievement (ELLMA), Continuous School Improvement, Special Education, and other key departments are a part of ensuring there is alignment with our District's instructional focus. Currently, members of these departments have been a part of the Blueprint process providing key information and expertise to inform our proposals. During Cohort I, departments have played specialized roles in supporting the mergers and expansion. In some cases supporting design team activities, problem solving specific issues. As this work expands, the involvement of these teams will continue to grow in order to support successful implementation.

The Network Superintendents will work closely with the design teams to ensure alignment and seamless supports following the design year.

In the table below you will see a series of tasks within our design year. This draws from our scope and sequence and highlights the plan to improve outcomes for students. This sequence of programmatic and operational activities was also presented to the Board of Education in a calendar view 2019-20 Design Year Scope and Sequence.

Timeframe	Design Year Tasks	Design Year Outcomes
Sept/ Nov	Develop 2019-20 Design Year Scope and Sequence to support Blueprint schools through the redesign processes.	Provides us a roadmap that is student centered and accounts for all elements of the design work.
	Develop stakeholder feedback, publish Cohort 2 Master Schedule, support design team leaders, draft team expectations, budgets, supports, information, expectations, and guidance.	Provides multiple stakeholders the opportunity to weigh in on the process and ensures we utilize diverse perspectives and cover all areas important to school communities.
	Plan and implement readiness & launch modules (listed earlier in this memo) for all Cohort 2 school leaders.	Engage and gather input that best meets the needs of the leaders to balance current year with future planning.
	Identify Cohort 2 Design Team Leaders and set role/responsibilities, expectations, etc.	Follow through on a student-centered process that identifies the best leader to support the school community through change.
	Recruit and launch Cohort 2 Design Teams in all schools.	Involve stakeholders that are closest to our kids in the design process.
	Develop training materials, schedule, expectations, and onboard coaches. Increase collaboration between coaches and Network Superintendents.	Provide resources and support for our leaders and teams and ensure consistency across all of our projects.
	Match Cohort 2 leaders/teams with coaches and implement a process to collaboratively on-board them both.	Provide weekly leadership support.
	Implement Cohort 2 Design Team Kick-Off Retreat.	Build collaboration amongst Cohort 2 design teams and build on equity and student centered principles.
	Schedule and implement school reviews in all Cohort 2 schools.	Identify assets of a school through a process.
	Share school design plan/playbooks v.1 (expansion, merger, design) required content, format and rubric schedule update meetings/events.	Provide leaders with the tools and support to develop comprehensive results-driven plans.
	Collaborate with Cohort 2 School Leaders & Design Team to develop team charters, meeting schedule, planning phase budget (including initial thinking about professional development, etc).	Develop strong relationships, partnerships, and collaboration that is sustainable for the design year and beyond.

	Collaborate with Cohort 2 School Leaders & Design Team to develop planning phase facilities budget and work plan.	Develop a process that addresses facilities and operation needs early in the year to ensure completion in a timely manner.
	Launch & Implement Cohort 2 Design Modules: (1) Review Assets/Challenges and Redesign Priorities/Goals; and (2) Adopt a Mission/Vision/Graduate Profile.	Develop strong vision with a comprehensive program focused on academic achievement.
Dec/ Feb	Plan and Implement Cohort 2 Launch and Q2 Step-Back/Assessment (with school teams and coaches/staff).	Provide a time to reflect, evaluate effectiveness and modify, if needed.
	Update Superintendent, Chief Academic Officer, Network Superintendents, and Board on Cohort 2 progress, lessons learned, iterations.	Provide update to stakeholders and gather feedback from community, staff, and Board.
	Cohort 2 Leaders and Instructional Team Leaders (ILT) members (up to 4) register and attend Standards Institute (pending funding/scholarships).	Provide professional development centered around academic achievement.
	Launch & Implement Cohort 2 Design Modules: (3) Instructional Program Design: Standards Based Curriculum, Instruction, Assessment (continued); (4) Operations & Systems.	Provide support to develop systems that build academic achievement that is grounded within the school curriculum, assessments, and instruction.
	Plan and Implement Cohort 2 Step-Back/ Assessment	Provide a time to reflect, evaluate effectiveness and modify, if needed.
Mar/ Apr	Update Superintendent, Chief Academic Officer, Network Superintendents, and Board on Cohort 2 progress, lessons learned, and iterations.	Provide update to stakeholders and gather feedback from internal staff and Board.
	Launch & Implement Cohort 2 Design Modules: (4) Operations & Systems (continued).	Provide support developing systems that build school culture and adult learning.
	Plan and implement Cohort 2 Step-Back/Assessment	Provide a time to reflect, evaluate effectiveness and modify, if needed.
	Develop school transition readiness checklist to develop launch plans and determine if extra time/resources are needed.	Ensure all checks and balances are covered and reconnect with the work around equity.
May/ June	Cohort 2 year-in-review celebration	Appreciation of completed design work that will be implemented in the next school year.

In the table below, you will find the programmatic cost breakdown for Cohort 2 during the design year for all school changes (Frick/SOL merger, MLA expansion, Fruitvale, and Sankofa/Kaiser merger). This does not account for facilities, operations, and staff salary costs for schools.

Activity Type	Item	Item Detail	Total Cost
School/Design Team Support	Conference/ Training	National Equity Project (NEP)	$23,000
School/Design Team Support	Lodging	Two days (inclusive food): Westerbeke, Asilomar, Other	$15,000
School/Design Team Support	Food	Two Days - Venue Rates (1 day for non overnight): Breakfast, Lunch, Dinner, Snacks	$2,700
School/Design Team Support	Travel	Mileage	$4,500
School/Design Team Support	Room Rentals	Two days: Westerbeke, Asilomar, Other	$2,400
Assessment Planning	Coaches	Leadership Coaches	$12,000
School/Design Team Support	Site-Budgets Programming	Subs, Stipends, Study Trips, Food, Childcare, Translation, Other	$140,000
School/Design Team Support	Training Convening	Breakfast, Lunch, Snacks	$2,100
School/Design Team Support	Training Convening	Breakfast, Lunch, Snacks	$1,050
School/Design Team Support	PD/Training	Registration Travel	$60,000

School/Design Team Support	Training Convening	Breakfast, Lunch, Snacks	$2,100
School/Design Team Support	Training Convening	Breakfast, Lunch, Snacks	$1,050
School/Design Team Support	Training Convening	Breakfast, Lunch, Snacks	$1,050
Coaching Cohort 2	Coaches	TBD	$48,000
			$314,950

How do the Sankofa vs. Santa Fe campuses compare?

	SANKOFA CAMPUS	SANTA FE CAMPUS
Capacity (# Classrooms)	Current capacity is 15 classrooms (without portables). With the installation of three additional new portables, the number of classrooms rises to 18.	19 Classrooms.
Capacity (# Seats)	336 at Sankofa, including two existing Special Day Class (SDC) classes (without portables). With the installation of three additional new portables, the seat capacity rises to a total of 456, including two existing SDC classes.	492 at Santa Fe, including two existing SDC classes.
Facilities Investment Required for the 2020-21 School Year	Estimated cost for blueprint changes is an average of $165K*, including 1 school program to a new location (Kaiser program to Sankofa). *based on an average of the costs from Cohort 1 changes. An estimated **additiona**l $700- $800K	Estimated cost for blueprint changes is an average of $165K* including 1 school program to a new location (Kaiser to Sante Fe Campus). *based on an average of the costs from Cohort 1 changes. An estimated **additional** $30K for

	to install 3 new portables, one-time cost.	moving an additional school program to a new location (Sankofa and Kaiser to Sante Fe Campus). An estimated **additional** $100K for baseline upgrades (e.g. re-sealing windows, repairs to flooring and ceilings) needed to re-open as a permanent school.
Previous Facilities Investments	**Recent Facilities Improvements at the site total: $13.6 M** ● Modernization including buildings and outdoor learning enhancements (2012-14) - $11.4 M ● Kitchen/Seismic (2017) - $2.1 M ● Playmatting (2019) - $84,116	**Recent Facilities Improvements at the site total: Approx. $200 K** ● Minor power and data upgrades - $100K ● Upgrade old Pleasant Valley Adult Education portables for Glenview aftercare - $100K
Average Distance for Kaiser students who live within 5 miles of the school	2.00 miles (not including SDC students)	1.97 miles (not including SDC students)
Average Distance for Sankofa students who live within 5 miles of the school	1.41 miles (not including SDC students)	1.26 miles (not including SDC students)

<u>Can we do a deeper analysis of the estimated enrollment impact of the North Oakland school changes?</u>

Our current analysis presumes that 10% of Sankofa students and 20% of Kaiser students will not return to the merged school. We estimate additional attrition for students moving to a new school location. This configuration of students would require 14-16 classrooms.

Less Attrition: If all rising Kaiser and Sankofa students returned to the merged school in its first year and 48 new Kinder students enrolled, there would be 379 students at the school. This would require a total of 18-19 classrooms.

Greater Attrition: If 10% of rising Sankofa students and 50% of rising Kaiser students did not return to the merged school, and 48 new Kinder students were enrolled, there would be 258 students (including the 16 rising SDC students). This configuration of students would require 14 classrooms.

What does a phase-out of Kaiser look like?

This option is not feasible for several reasons:

- Part of the goal of relocating and merging this program is to move it to a location where more students live so that more students have easier access to the program. Phasing out Kaiser would not allow this to happen.
- From a financial standpoint, phasing out the school will create an increasingly unsustainable program for almost five years. The relative cost over time will increase on a per pupil basis as the population shrinks each year. That is, as the student population decreases, the fixed costs (principal, facilities, custodial, clerical, etc.) will remain the same. This will mean that more District resources will be required to subsidize a school with lower enrollment, and this subsidy would increase over time.
- The subsidies required would only sustain a basic program with no enrichments or other supports. This is not desirable for students. It would likely lead to higher attrition rates and further exacerbate the financial impact.
- In the past 15 years, school phase outs have been short duration and primarily limited to situations where a new school was replacing a school on the same campus (e.g., Greenleaf replacing Whittier), or where a principal was leading a school and also overseeing the phase-out of a nearby school or overseeing the phase-out of multiple schools for a one-year period.

Attachment

August 28, Blueprint for Quality Schools Cohort 2 Recommendations Presentation
August 28, Blueprint for Quality Schools Cohort 2 Background Memo

RESOLUTION
OF THE
BOARD OF EDUCATION
OF THE
OAKLAND UNIFIED SCHOOL DISTRICT
NO. 1920-0156C

COHORT 2 SCHOOLS

Adopting Proposal To Merge The Kaiser Elementary School And Sankofa Elementary School Programs At The Sankofa Campus

WHEREAS, the OUSD Board of Education "Board" is responsible for ensuring that the Oakland Unified School District (OUSD) is a high-quality full-service community school district that serves the whole child, eliminates inequity, and provides each child with excellent teachers every day; and

WHEREAS, the Board recognizes the need to increase access to high quality district schools for the students and families of Oakland and to invest in the redesign and reconfiguration of OUSD; and

WHEREAS, the Board acknowledges that in order to stabilize and grow enrollment overtime, the District must design high-quality programs to attract and retain Oakland's diverse students, families and educators; and

WHEREAS, the Board recognizes that it has a fiduciary responsibility to operate a central office and the number and type of schools that it can sustain over time; and

WHEREAS, on June 27, 2018, the Board adopted the Blueprint for Quality Schools Work Plan (Resolution 1718-0207) which reaffirmed the district's Quality Community School Standards, and provided for a process and timeline for selection, planning, and implementation phases; and

WHEREAS, on June 27, 2018 the Board also adopted the "Considerations for School Selections in Blueprint for Quality Schools Work Plan" (Resolution 1718-0208), which included: "Guiding Equity Principles for School Changes", "School Selection Approach Considerations", "Qualitative Data", and "Quantitative Data"; and

WHEREAS, on March 13, 2019 the Board adopted the "Improving Community Engagement for Proposed School Changes" (Resolution 1819-0178), which directed the Superintendent or designee consult with an ad hoc stakeholder group, a time-limited advisory committee, comprising up to 15 individuals, including but not limited to students, families, labor partners, including 2-3 representatives from the Oakland Education Association (as selected by the OEA President), principals, community members and district staff; and

WHEREAS, on June 19, 2019, the Board of Education adopted the revised Blueprint for Quality Schools Action Plan that incorporates the changes that the Superintendent is recommending based on the Blueprint Ad Hoc Committee Recommendations; and

WHEREAS, the Resolution recognizes that the "Blueprint for Quality Schools is an iterative process involving further input and development based on potential Board policies and further engagement with sites and community"; thus, the Board shall receive semi-annual updates on improvements to the process;

NOW, THEREFORE, BE IT RESOLVED THAT the Board hereby adopts the proposal to merge the Kaiser and Sankofa programs at the Sankofa campus; and,

BE IT FURTHER RESOLVED THAT the Superintendent shall take steps to implement the reorganization of these schools and campuses to effectuate the goals outlined in the Blueprint.

Passed by the following vote:

PREFERENTIAL AYE:	None
PREFERENTIAL NOE:	None
PREFERENTIAL ABSTENTION:	Student Directors Mica Smith-Dahl and Denilson Garibo
PREFERENTIAL RECUSE:	None
AYES:	Jumoke Hinton Hodge, Gary Yee, James Harris, Vice President Jody London and President Aimee Eng
NOES:	Roseann Torres and Shanthi Gonzales
ABSTAINED:	None
RECUSE:	None
ABSENT:	None

CERTIFICATION

We hereby certify that the foregoing is a full, true and correct copy of a Resolution passed at a Regular Meeting of the Board of Education of the Oakland Unified School District, held on September 11, 2019.

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OAKLAND UNIFIED SCHOOL DISTRICT

Aimee Eng

Aimee Eng
President, Board of Education

Kyla Johnson-Trammell
Superintendent and Secretary, Board of Education