



BUSINESS AND OPERATIONS DIVISION

To: OUSD Board of Education
From: Troy Christmas, Financial Transparency Team
Subject: **Superintendent Workplan #3b**
Date: November 30, 2016

OVERVIEW & OBJECTIVE

- The objective of Superintendent Workplan 3b is to “Continue to refine and customize the web based budget tool for public use that displays real-time budget data and clearly displays all revenue streams and expenditures as they relate to district priorities.”
- This memo and attached PowerPoint (PPT) are intended to provide an update to the Board of Trustees on the Superintendent’s Work Plan Goal 3b and our continuing efforts in Financial Transparency.

SUMMARY

- Through an iterative process involving stakeholder input and internal development we are on track to deliver the next iteration of interactive Financial Transparency tools in January 2017 to incorporate LCAP action areas.
- Stakeholder input has led to broaden and deepen the roadmap of tools being developed to target audiences focused on individual schools, district-wide operations and general community interest.
- Staff transition, our financial system and transition to a new financial system remain challenges that must be managed to maintain our timeline.
- To ensure usefulness, we are developing trainings and trainers designed to support multiple stakeholder groups and needs.

THEORY AND PLAN

The Theory of Action behind this Work Plan Goal is: If OUSD provides user-friendly access to how it receives and uses money aligned to district priorities, then it will secure greater support from key stakeholders in the development and then implementation of district priorities, and as a result, implementation efforts will have greater success in improving student outcomes.

PROCESS

The process of development is iterative with 1) primarily external processes of releasing examples for a period of stakeholder feedback and 2) primarily internal periods of prioritizing feedback and further development. Through direct outreach and the District Budget Advisory Committee, we heard from several stakeholder groups including parent groups, labor unions, community groups, board members and principals.

MULTIPLE AUDIENCES AND MULTIPLE RESOURCES

Our outreach clearly indicated there are different audiences that engage with financial data from different viewpoints. Our challenge is to create tools and resources that are easy to understand, targeted to the needs of particular audiences and provide varied training and support to make resources most accessible. To support this effort, in addition to the interactive web-based budget tool, we are developing more resources on the District’s website to support a broad



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understanding of school district finance, the District's budget and key terms necessary for full understanding. We will also be adding multiple forms of training.

ROADMAP

For the interactive budget tools, our current roadmap includes creating 3 tools targeted at 3 primary audiences: 1) **District-focused** to better support PSAC and advocacy groups schedule for January 2017, 2) **School-focused** to better support SSCs, principals and parents scheduled for Spring 2017, and 3) **Interested Citizen focused** to better support an understand of the general public of our efforts and result scheduled for Spring 2018. We heard clearly to simplify our tools and "hide the complexity". Our goal is to make tools simultaneously easy to use as quick summaries, but containing powerful "drill down" capability for those who wish to use it. We are on schedule to publicly launch the District-focused tool January 17, 2017.

CHALLENGES

While we are on track for our January release, there are a few challenges that provide some uncertainty about timing and our ability to provide certain features we desire (e.g. multi-lingual capability, multi-year comparisons). The District's current financial system was not designed to capture LCAP-related information, nor configured to hold funding categories associated with LCFF (e.g. Supplemental and Concentration). There is much effort ongoing in the Finance and other departments to ensure this information is available for many purposes, including our Financial Transparency tools. In recognition of these and other challenges, the District is transitioning to a new financial system over the next several months. When complete, the transition will greatly improve the capability and speed to produce interactive tools, but in the interim the same Finance and IT team that supports our transparency work must also devote significant time to system transition. Lastly, we are working our software provider, Tableau, to determine the best course to provide multilingual support.

NEXT STEPS

Our current work is primarily focused on the January release of the District-focused tool and inclusion of LCAP information. We are working with the Finance and other departments to ensure this information is in the financial system. We will continue stakeholder sessions to support minor revisions prior to the January release and development of training tools and sessions to develop a group of "data experts" who can work with their respective stakeholder groups. Lastly, we expect to include a full demonstration at a future board meeting as part of our communication plan.