OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

School Portfolio Management and District Restructuring Decisions

Expanding Quality and Releasing Resources

v21.1

"We can, whenever and wherever we choose, successfully teach all children whose schooling is of interest to us. We already know more than we need to know in order to do that. Whether or not we do it must finally depend on how we feel about the fact we haven't so far."

- Ron Edmunds

Road Map

- Part I: Background & Landscape
- Part II: Criteria (Recap)
- Part III: Recommendations
- Part IV: Financial Analysis (Summary)
- Part V: Next Steps & Timelines

Part I

Background & Landscape

Academic and Fiscal Challenges

Why Do We Need to Restructure?

- The district operates too many schools for the number of students in the district.

- The district operates too many under-enrolled schools and very small schools not otherwise designed to be small.

- The district does not provide a quality program with adequate services to meet student and family needs in every neighborhood.

Academic and Fiscal Challenges

OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

- **CAHSEE 10th Grd NO-PASS Rate** (10-11)

	ELA	Math
• State	17%	17%
• OUSD	36%	36%
• OUSD African-American	41%	51%

- Currently (2010-11) **35** schools received additional **$$$** fiscal assistance totaling **$3,100,000**. **10** schools required additional assistance of over **$100,000** each.

- **School Enrollment 2011-12**
  - **19** schools with **under 200** students
  - **24** schools with **btwn 200-299** students
  - **33** schools with **btwn 300-399** students
  - **9** schools with **btwn 400-499** students
  - **16** school with over 500 students

  ** Some schools may be small by design.*

DISTRICT	# SCHOOLS	ENROLLMENT**	Compared to OUSD # Schools/# Students	API**
Long Beach Unified:	*89 schools*	*serving 86,000 students*	*-12/+48K*	*759*
Sacramento Unified:	*85 schools*	*serving 48,000 students*	*-16 /+10K*	*753*
San Bernardino Unified:	*74 schools*	*serving 53,000 students*	*-27/+15K*	*699*
Garden Grove Unified:	*67 schools*	*serving 47,000 students*	*-34/+9K*	*802*
Santa Ana Unified:	*60 schools*	*serving 57,000 students*	*-41/+17K*	*724*
Stockton Unified:	*59 schools*	*serving 38,000 students*	*-42/+0K*	*671*
Mount Diablo Unified:	*55 schools*	*serving 34,000 students*	*-46/-4K*	*784*
San Jose Unified:	*52 schools*	*serving 32,000 students*	*-49/-6K*	*792*
Riverside Unified:	*49 schools*	*serving 42,000 students*	*-52/+4K*	*781*
Fontana Unified:	*45 schools*	*serving 41,000 students*	*-56/+3K*	*731*
Moreno Valley Unified:	*38 schools*	*serving 36,000 students*	*-63/-2K*	*716*
Clovis Unified:	*36 schools*	*serving 38,000 students*	*-65/+0K*	*866*
OUSD in 2011-12	**101 schools**	**serving 38,440 students**		**726**

** SOURCE: 2009-10 Ed-Data, OUSD 2011-12 Projections

What Do We Hope to Accomplish through Restructuring?

- Provide more children with quality school options
- Encourage more families to choose Oakland public schools
- Create a sustainable school district that produces results for all children
- Deploy staff and money more efficiently and use the savings to invest more resources in Oakland public schools to better serve our students

Part II

Criteria (Recap)

Oakland Unified School District: **RESTRUCTURING CRITERIA**

GUIDING PRINCIPLES:

- **Consider a variety of factors in decision-making** by taking into account multiple district priorities.

- **Reinforce quality neighborhood schools** by focusing decision-making on where children live, attend school, and where facilities are designed to sustain quality programs long-term.

- **Integrate school closure among multiple strategies to achieve goals** by transforming low performing schools in high density areas and consolidating multiple schools into high quality single-school options in some cases.

- **Increase student and family access to quality alternatives** by expanding capacity and investing in existing quality schools.

- **Increase quality options** by considering innovative program designs, the possible relocation of some school programs intact, and the unique needs of the special education program continuum of service.

The focus in selecting schools for closure was:

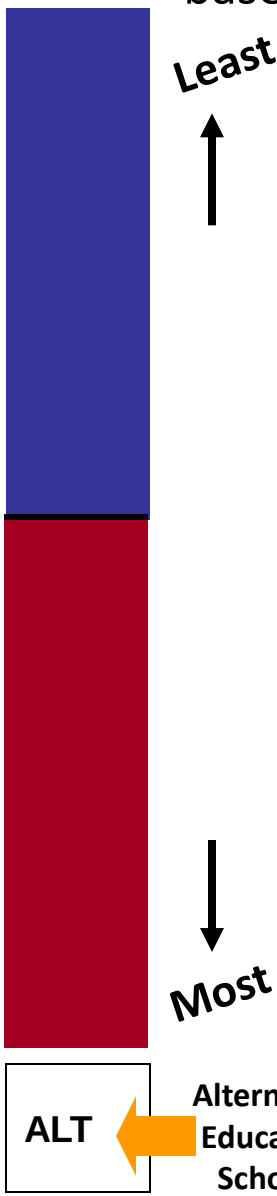
Equity and a Thoughtful, Multi-Step Process

We begin by asking: WHERE DO WE NEED TO OPERATE SCHOOLS?

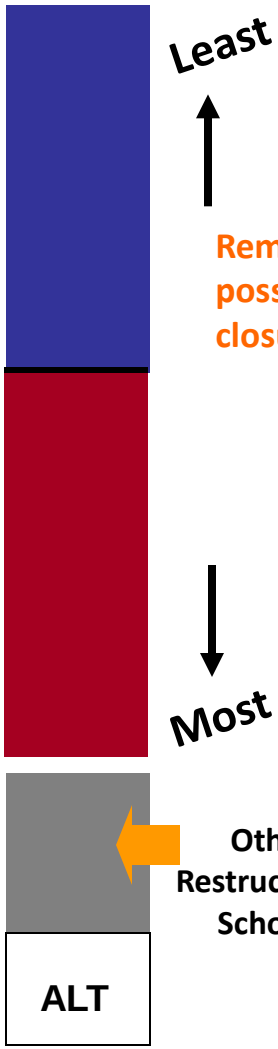
WE ANALYZED:

1. **POPULATION DENSITY : ENROLLMENT : FACILITY CAPACITY**
2. **OTHER RESTRUCTURING STRATEGY**
3. **LOWEST RANKING : GREATEST DISTANCE FROM OTHERS**
4. **ADDITIONAL FACTORS IF SCHOOLS SHARE BOUNDARIES**
   PERFORMANCE : SCHOOL CHOICE : FISCAL HEALTH
5. **RECEIVING SCHOOL CONSIDERATION**
6. **FINAL RECOMMENDATIONS**

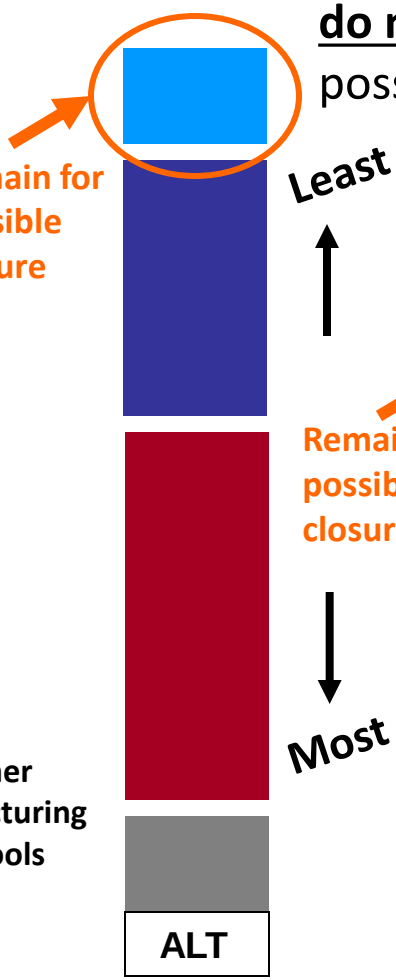
STEP 1: Rank order all schools from where **least** needed to where **most** needed based on ***population density, enrollment, and facilities***.



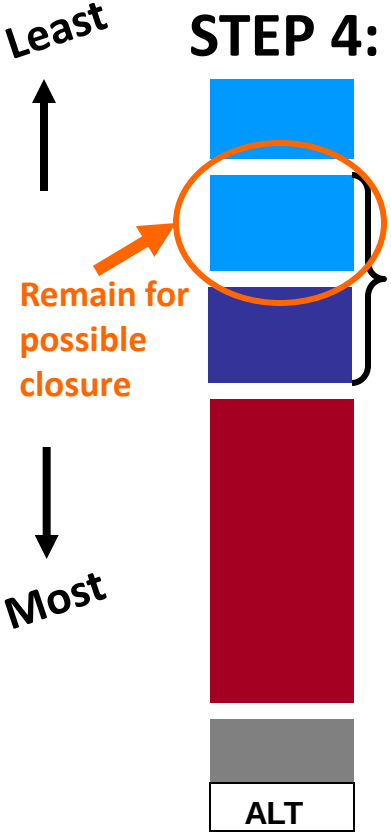
STEP 2: Exclude schools based on ***other restructuring***.



STEP 3: Separate schools where **least** needed that **do not share** an attendance boundary for possible closure consideration.



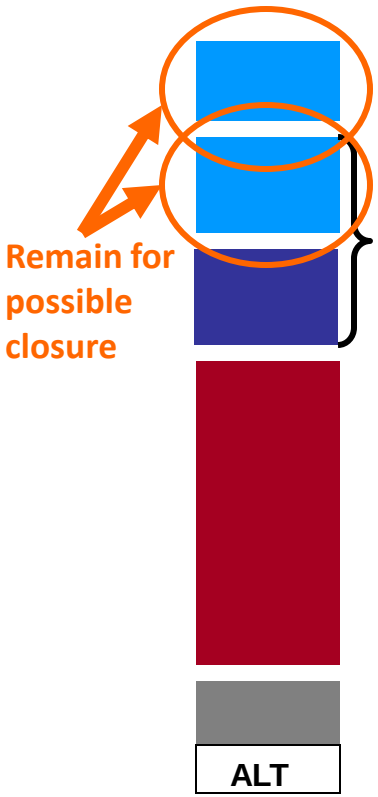
STEP 4: Among schools where **least** needed that **share** an attendance boundary, use **other factors for comparison**, to identify additional schools for possible closure consideration.



Oakland Unified School District: **RESTRUCTURING CRITERIA**

Following the Board Study Session on September 7, 2011; staff conducted analysis in support of the remaining Steps 5 and 6 within the Approved Restructuring Criteria.

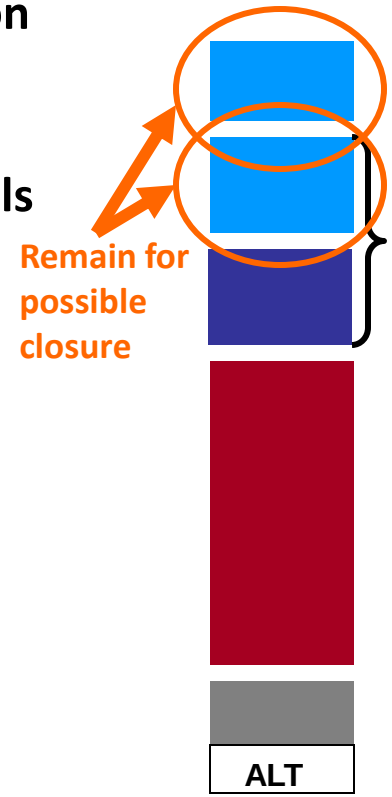
STEP 5:



5.1 **Special Education** Program Relocation

5.2 **Receiving Schools** Analysis

STEP 6:



Recommendations of Superintendent

Consideration given to:

- Goals of the Strategic Plan
- Capacity of the organization to successfully implement proposals
- Adopted Guiding Principles of Restructuring

Part III

Recommendations

STEP 6: Recommendations

Recommendations of Superintendent

Consideration given to:

- **Goals of the Strategic Plan**
- **Capacity of the organization to successfully implement proposals**
- **Adopted Guiding Principles of Restructuring**

The Goals of Restructuring within the Strategic Plan are to:

- **Expand Quality**
- **Release Resources**

The application of the Board's approved criteria has provided an opportunity to analyze ways in which the District can accomplish these goals through school restructuring.

Restructuring Terminology

Term	Definition
School Closure	Closing a school program and providing alternate placements for students and staff with access to higher performing schools.
Quality Expansion	Maintaining staffing, *(including classified, certificated, and administration)* student enrollment, and the integrity of all program components and partnerships. Expand existing facility and/or relocate school to a facility in support of manageably increasing enrollment resulting in at least: District Avg. – 380 students.
Transformation	A process of re-designing an existing school program or multiple school programs to establish an improved program with greater likelihood to meet the educational needs of all students.
Grade Configuration Change	Changing the grade configuration of a school to serve; grades PK-12, PK-8, 6-12, and/or PK-12.
Consolidation	Establishment of a single school program in place of two or more existing school programs. In most cases as the result of phasing out one school program and increasing the capacity of another school program. In some cases as the result of a newly designed program to serve all students.
Campus Closure	Represents a school facility in which the district currently will not operate a district school.

STEP 6: Recommendations

RESTRUCTURING	DSTRCT	GRADE	SCHOOL NAME
SCHOOL CLOSURE in 2012	2	Elem	Lakeview Elementary
SCHOOL CLOSURE in 2012	5	Elem	Lazear Elementary
SCHOOL CLOSURE in 2012	7	Elem	Marshall Elementary
SCHOOL CLOSURE in 2012	4	Elem	Maxwell Park Elementary
SCHOOL CLOSURE in 2012	1	Elem	Santa Fe Elementary
TRANSFORMATION in 2012	7	High	Business, Information & Tech
TRANSFORMATION in 2012	7	High	East Oakland School of the Arts
TRANSFORMATION in 2012	7	High	Leadership Preparatory Acad
TRANSFORMATION in 2012	7	High	Youth Empowerment School
TRANSFORMATION in 2012	5	High	College Prep & Architecture
TRANSFORMATION in 2012	5	High	Mandela Academy
TRANSFORMATION in 2012	5	High	Media Academy
TRANSFORMATION Begun in 2011	7	Alt Ed	Barack Obama Academy
QUALITY EXPANSION by August 2013	6	Elem	Burckhalter Elementary
QUALITY EXPANSION by August 2013	1	Elem	Kaiser Elementary
GRADE CONFIGURATION CHANGE PreK-12 by August 2013	7	Elem	Sobrante Park / Madison Middle School
ACADEMY EXPANSION of Oakland Technical High School	1	Alt Ed	Far West High School

STEP 6: Recommendations

SUMMARY: SCHOOL REDUCTIONS PROPOSED *(Multi-year)*	
Elementary Schools	5
High Schools	5
Alternative Ed Schools	2
TOTAL SCHOOL PROGRAMS	12
TOTAL CAMPUS CLOSURES	5

STEP 6: Recommendations

RESTRUCTURING	DSTRCT	GRADE	SCHOOL NAME
SCHOOL CLOSURE in 2012	2	Elem	**Lakeview Elementary**
SCHOOL CLOSURE in 2012	5	Elem	**Lazear Elementary**
SCHOOL CLOSURE in 2012	7	Elem	**Marshall Elementary**
SCHOOL CLOSURE in 2012	4	Elem	**Maxwell Park Elementary**
SCHOOL CLOSURE in 2012	1	Elem	**Santa Fe Elementary**

TERM	DEFINITION
School Closure	Closing a school program and providing alternate placements for students and staff with access to higher performing schools.

SCHOOL CLOSURE STUDENT TRANSITIONS	
Lakeview: K-4 student transitions	**254**
Lazear: K-4 student transitions	**217**
Maxwell Park: K-4 student transitions	**177**
Santa Fe: K-4 student transitions	**125**
Marshall: K-4 student transitions	**109**
TOTAL K-4 STUDENT TRANSITIONS in 2012-13	**882**
SPECIAL EDUCATION SDC STUDENT TRANSITIONS in 2012-13	**77**

STEP 6: Recommendations

RESTRUCTURING	DSTRCT	GRADE	SCHOOL NAME
TRANSFORMATION in 2012	7	High	**East Oakland School of the Arts**
TRANSFORMATION in 2012	7	High	**Leadership Preparatory Acad**
TRANSFORMATION in 2012	7	High	**Business, Information & Tech**
TRANSFORMATION in 2012	7	High	**Youth Empowerment School**
TRANSFORMATION in 2012	5	High	**Mandela Academy**
TRANSFORMATION in 2012	5	High	**Media Academy**
TRANSFORMATION in 2012	5	High	**College Prep & Architecture**
TRANSFORMATION Begun in 2011	7	Alt Ed	**Barack Obama Academy**

TERM	DEFINITION
Transformation	A process of re-designing an existing school program or multiple school programs to establish an improved program with greater likelihood to meet the educational needs of all students.

STEP 6: Recommendations

RESTRUCTURING	DSTRCT	GRADE	SCHOOL NAME
QUALITY EXPANSION by August 2013	6	Elem	**Burckhalter Elementary**
QUALITY EXPANSION by August 2013	1	Elem	**Kaiser Elementary**

TERM	DEFINITION
Quality Expansion	Retaining/expanding staffing, *(including classified, certificated, and administration)* student enrollment, and the integrity of all program components and partnerships. Expand existing facility and/or relocate school to a facility in support of manageably increasing enrollment resulting in at least: District Avg. – 380 students.

To ensure maintaining and locating high quality programs within a facility that would allow for manageable expansion of the program to serve additional students; proposal is to expand facility capacity or relocate to a facility with sufficient capacity to serve at least the District Average – 380 students; by August 2013.

EXAMPLES OF SUCCESSFUL QUALITY SCHOOL RELOCATIONS IN OAKLAND:

- ACORN Woodland
- Life Academy
- Melrose Leadership Academy
- Peralta Elementary
- Think College Now
- Urban Promise Academy

(Temporary relocation to Carter Campus due to fire)

STEP 6: Recommendations

RESTRUCTURING	DSTRCT	GRADE	SCHOOL NAME
GRADE CONFIGURATION CHANGE PreK-12 by August 2013	7	Elem	**Sobrante Park / Madison Middle School**

TERM	DEFINITION
Grade Configuration Change	Changing the grade configuration of a school to serve; grades PK-12, PK-8, 6-12, and/or PK-12.

RESTRUCTURING	DSTRCT	GRADE	SCHOOL NAME
ACADEMY EXPANSION of Oakland Technical High School	1	Alt Ed	**Far West High School**

ACADEMY EXPANSION	**Currently, Far West is threatened to lose its Academy funding due to its small size as an individual school. Far West High School will retain its teaching staff and student enrollment and remain at its current facility. Far West will undergo a design process in collaboration with Oakland Technical High School to develop a coherent Academy program integrated within Oakland Technical High School.**

Part IV

Financial Analysis (Summary)

Financial Analysis – Unrestricted Financial Methodology / Assumptions

Elementary:

(Total unrestricted school budget*)	**-**	**(Teacher costs**)**	**=**	**(Total unrestricted resources available to reinvest in remaining schools)**

* Unrestricted school budgets include custodial cost, utilities, administrator costs, clerical cost, supplies, etc.

** Unrestricted Full Time Equivalents (FTE) for teachers x Average Teacher Cost for each school

High Schools:

Fremont Campus - The three schools on Fremont's campus were budgeted as one single school for this year (2011-12). The resources have already been invested.

Castlemont/ Y.E.S Campuses - There was an additional investment made of approximately $226K this year (2011-12). Thus, the release of resources is expected to be $226K to spend in support of quality program.

Financial Analysis – Unrestricted Financial Results

Elementary:	
Lakeview	$384,000
Lazear	488,000
Marshall	345,000
Maxwell Park	448,000
Santa Fe	368,000
Elementary Total	$2,033,000
Fremont Campus	$0
Castlemont/Y.E.S. Campuses	$226,000
Total Unrestricted Available Resources	**$2,259,000**

Note 1 - OUSD will invest in receiving schools to ensure as many OUSD students as possible are supported in their transition to quality school options.

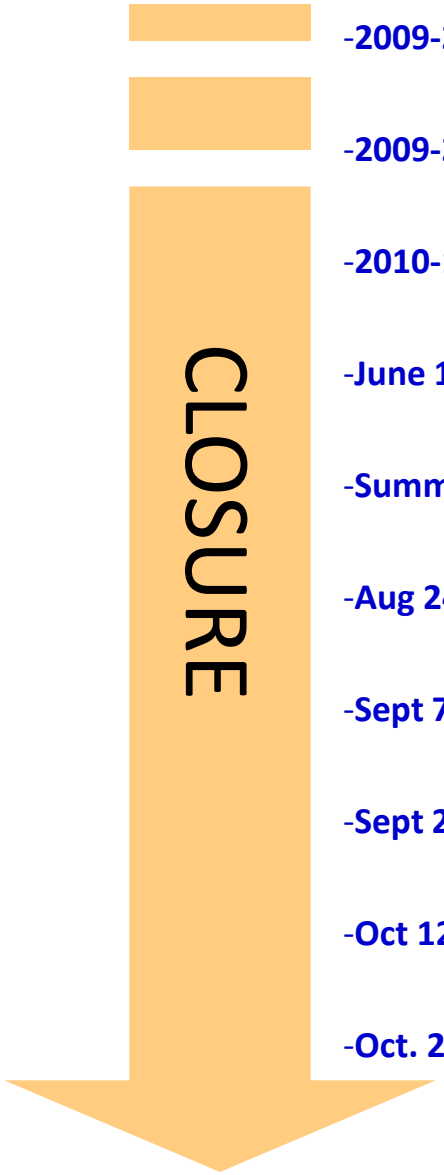
Note 2 - The restricted resources related to these elementary schools are approx. $1.2M. These resources will also be made available to the remaining schools.

Note 3 - The average release of resources for elementary schools is approx. $400K per school.

Part V

Next Steps & Timelines

2011-12 Restructuring Decision-Making Process & Timelines



-**2009-2011:** School Closures: Paul Robeson, BEST, Explore, Tilden

-**2009-2011:** Public Acknowledgements by Superintendent of need for reduction in schools

-**2010-11:** Development of Strategic Plan

-**June 18, 2011:** Unanimous Board Approval of Strategic Plan

-**Summer 2011:** Development of Restructuring Criteria based on Strategic Plan

-**Aug 24:** Restructuring Criteria Unanimously Approved by Board of Education

-**Sept 7:** Study Session: Criteria Applied by staff up to STEP 4 without Recommendations

-**Sept 27:** Superintendent's Restructuring Recommendations: 1st Reading

-**Oct 12:** Superintendent's Restructuring Recommendations: 2nd Reading
- *Possible Board of Education* ***Decision-Making re: School Closure***

-**Oct. 26:** Final Date proposed for **Decision-Making re: School Closure**

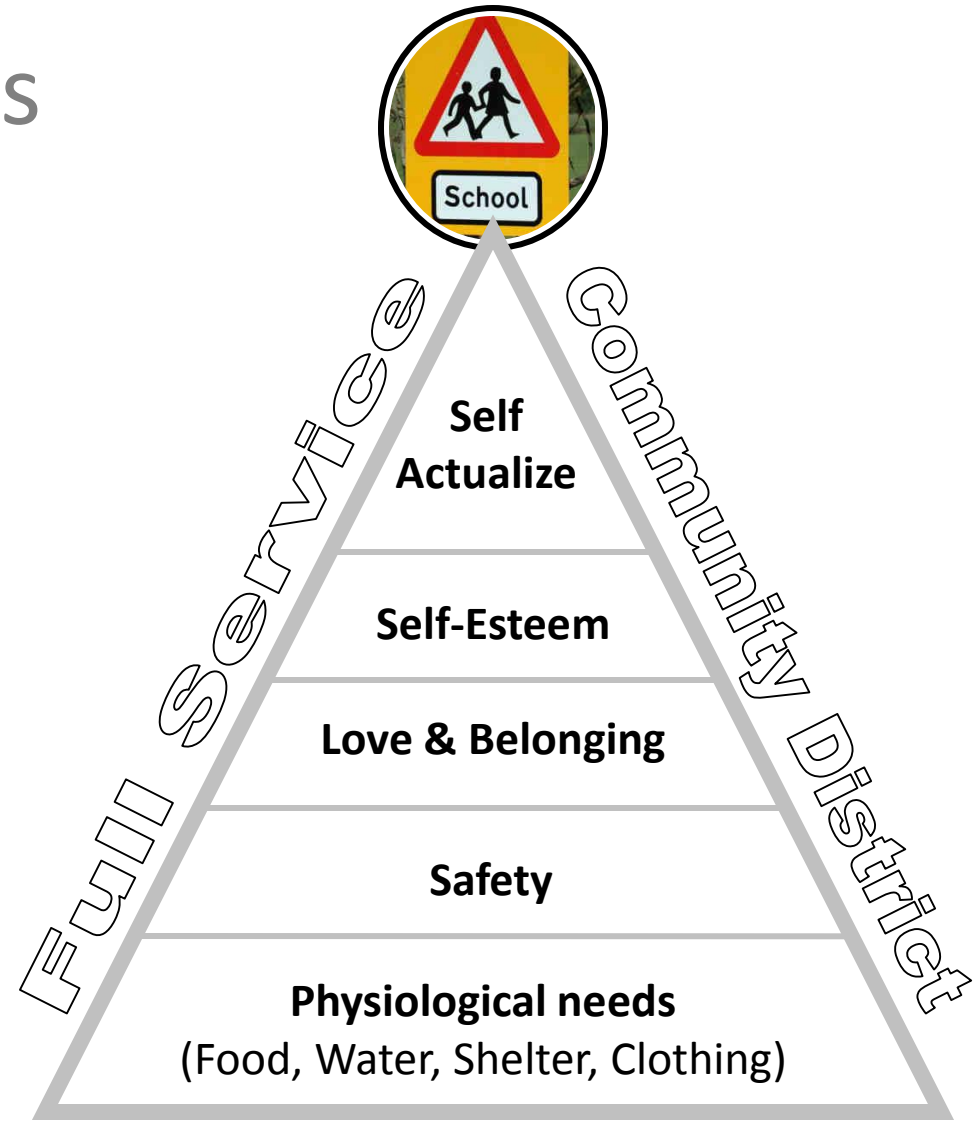
Hierarchy of Needs:

Schools

Supporting
Students

Supporting
Families

Supporting
Principals
& Staff



Support Plan **Goals**

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

As a result of the support we provide as a **Full Service Community District**, the following will be true…

Students

Families

Principals & Staff

Feel…

- Informed
- Engaged
- Supported
- Welcome

OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

Supporting Students looks like:

- Priority placement in Options process
- Celebrating transition year as "legacy class"
- Opportunities to transfer w/ friends
- New School Site Visits
- New Student Welcome BBQ's
- New School Orientations
- Summer Transition Programs
- Peer Buddy Programs

Supporting Principals & Staff looks like:

- Priority consideration in future leadership
- Priority consideration for teacher placement
- Working collaboratively with teacher & staff organizations
- Frequent and accurate communication
- Principal Advisory Committee
- Facilitation of stakeholder engagements
- Hand-holding through closure procedures
- Support for closing year evaluations
- School Options tours & event coordination
- Written communication for stakeholders
- On-site support for all staff transitions
- Support and planning assistance to receiving schools

Supporting Families looks like:

- Priority placement in Options process
- Being well informed of all school options
- Consideration of parent rationale for school preferences
- Providing translation services
- Scheduled bus tours during Options process
- Options Fairs on-site
- New school site visits
- New school welcome social or BBQ's
- Family mentors at new school
- Consideration of transportation needs in placements
- On-site support for all student transitions

2011-12 Restructuring Decision-Making Process & Timelines

TRANSITION SUPPORT

-**Oct. 26:** Final Date proposed for **Decision-Making re: School Closure**

-**Nov 1-30:** On-site Alternate Schools Options Fairs

-**Nov 1-30:** Alternate Schools Options Bus Tours

-**Nov 1-Dec 5:** Separate Options Process: Closing Schools

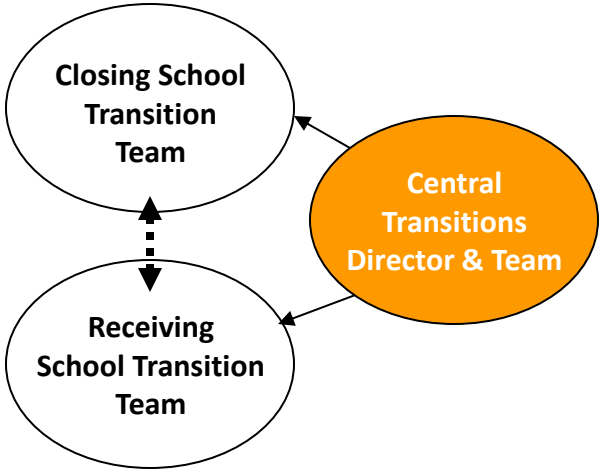
-**Dec 20:** Closing Schools: Preliminary Placement Notice

-**Jan 1-30:** Closing Schools: Preliminary Placement Appeals

-**Dec 5- Jan. 20:** District-wide Options Process Opens

-**Feb-March:** Closing Schools: Placement Appeals Response

-**Oct-Jun:** Receiving Schools Preparation and Transition Support



Site Disposition Options: Possibilities for Sites

	Disposition objective	Site characteristics:
OUSD inhabited	• Future site for OUSD school	• Sufficient capacity • Meets minimum space requirements • Does not require major improvements
	• Future site for OUSD program offering	• Sufficient capacity for program • Meets offerings minimum space requirements
	• Relocation of administrative functions	• Can accommodate administrative space needs • Does not require major improvements • Sufficient parking • Central location
Non-OUSD inhabited	• Sale/Lease (non-school use)	• Does not meet minimum space requirements for OUSD school • Offer price meets cost/benefit targets
	• Non-OUSD school site	• No OUSD demand for school on site • Does not meet minimum space requirements for OUSD school
	• Retain land for future use	• No demand for site in current condition • Site environmental conditions conducive to school

Grade Configuration Change

Grade configuration change represents the expanding of a school's grade configuration to serve either grades PK-8, PK-12 or 6-12. Approach would expect each school to grow each grade one year at a time. The proposal expects to analyze annually the educational benefits of the expanded grades and consider the educational benefits of additional grade configuration changes in other school settings.

Grade configuration change proposals included here are intended to expand quality programs. This strategy for maximizing assets is not proposed for specific schools as an alternative to school closure.

Restructuring Proposals: **Grade Configuration Change**

BACKGROUND:

GRADE CONFIGURATION CHANGES

• **Beginning Fall 2010,** Central administration was contacted by school leaders and/or facilities dept to support specific schools facing urgent facility-related decisions & considering grade configuration changes.

• **Fall 2010,** Central administration hosted site visits to K-8 schools, and engagement events with leaders of local K-8 and 6-12 schools to explore benefits and challenges of these unique grade configurations.

• **Fall & Winter 2010,** Central administration was contacted by additional school leaders and school communities, seeking support to explore grade configuration changes.

• **Spring 2011,** Central administration developed preliminary ***"Readiness Factors"*** to assist in making recommendations to the Superintendent in consideration of possible grade configuration changes.

• **Spring 2011,** to support a systemic approach to evaluating grade configuration change proposals, all school leaders district-wide were invited to submit a Letter of Interest if their school communities were already engaged in meaningful consideration of grade configuration changes, prior to initial recommendations to the Superintendent.

• **Summer 2011,** meetings were held with all leaders proposing grade configuration changes to review Letters of Interest. Letters of Interest that contained challenges not likely to be resolved in the current year were encouraged to participate in a future cycle.

• **Fall 2011,** Board of Education directed Superintendent to develop Restructuring Criteria; among other programmatic priorities, such as STEM and high school re-design included within the criteria, grade configuration changes were included to provide the opportunity to initiate planning of Expanding School Plan in support of Superintendent and Board decision-making.

• **Fall 2011,** Grade configuration changes are not proposed as an alternative to school closure.

2011-12 GRADE CONFIGURATION CHANGE PLANNING PROCESS

Part A

September 27, 2011:

Establish a site-based study team to:

Explore the benefits and implications of school expansion

Develop a thorough Feasibility Analysis

Host community engagement event(s)

October 25, 2011:

Conduct **one or more** community engagement event(s) to share initial ideas for school expansion and gather signatures of support

Complete Feasbility Analysis

November 1, 2011:

Presentation to Superintendent on **key benefits and trade-offs** of proposed expansion for **Life Academy**

November 29, 2011: *(revised)*

Presentation to Superintendent on key benefits and trade-offs of proposed expansion for

Greenleaf, La Escuelita, Madison, and Sankofa

Not Later than December 14, 2011

Decision by Board of Education regarding expansions.

Expanding School Design Team

Part B

Restructuring Proposal: Grade Configuration Change Planning

SUMMARY:

Grade Configuration Change School Design Team will develop Expanding School Plans

PLAN - PART A: DUE December 1, 2011

- **Framing of compelling rationale for expansion**
- **Description of how the current program/s meet goals of the Strategic Plan**
- **Identify value-add components of program/s**
- **Identify Key Practices**
- **Complete Feasibility Analysis** *(staffing, enrollment, facilities)*

DECEMBER 14, 2011 Decision-Making re: Grade Configuration for 2012 and 2013
*(**November 9, 2011** re: Schools requiring new student recruitment beginning 2012)*

PLAN - PART B: *If approved* DUE March 13, 2012

- **Expanding-up program planning**
- **Roll-out of implementation plan**
- **Operationalizing of program, i.e. staffing, budget, enrollment**
- **Identify central supports needed**
- **Identify structural supports needed**

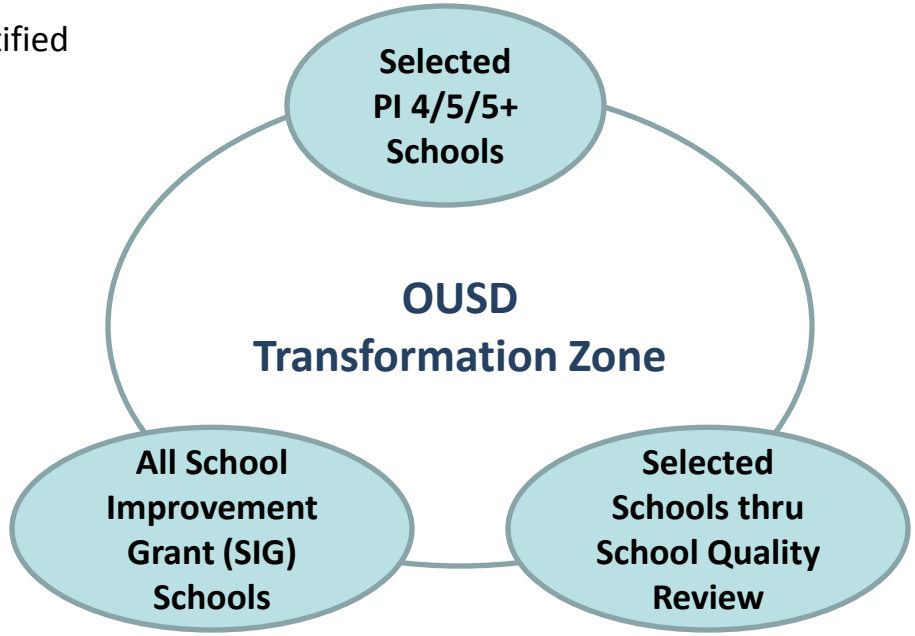
Transformation

A process of re-designing an existing school program or multiple school programs to establish an improved program with greater likelihood to meet the educational needs of all students.

2011-12 Restructuring Process & Timelines

TRANSFORMATION

- **2009-10/ 2010-11:** Schools Identified
- **Sept 13:** School Design Begins
- **Sept 29:** Design Team Begins
- **Oct 25:** Guiding Questions
- **Nov 29:** Model School Visits
- **Dec 13: PLAN Part A:** 1st Set Recommendations
- **Feb 14: PLAN Part B:** Final Recommendations Community update
- **Feb -July:** Operations and Implementation Planning



Forthcoming Analysis: Shared Campuses

The district currently operates two schools sharing a single campus at 8 locations (7 elementary, 1 middle).

Analysis based on the Board-approved Restructuring Criteria indicates that each campus currently housing two schools represents a location where a school is most needed based on population density, enrollment and facility capacity.

Staff proposes to develop and propose criteria against which to evaluate the effectiveness and sustainability of the programs located on these campuses and to make any proposed restructuring recommendations to the Board of Education between June and August 2012.

2011-12 Shared Campus Criteria Development

SHARED CAMPUSES

- **January 31:** Establish preliminary shared campus criteria

- **February-March:** Conduct feedback sessions re: Proposed Criteria with stakeholders through existing and developing structures: Eg.
- Principal Advisory
- Family Engagement Advisory
- DAC/ DELAC
- Bargaining Units

-**May 2012:** Present Shared Campus Evaluation Criteria to Board of Education for 1st Reading

- **June 2012:** Seek Approval of Shared Campus Evaluation Criteria

- **June-August:** Conduct Analysis based on Shared Campuses Criteria and present results of analysis to Board of Education

- **By August 2012:** Make recommendations based on application of criteria for possible restructuring of one or more shared campuses.

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