Overheard at OUSD…

"…There are amazing leaders here. Let's do better. We can do it."

"There is too much asked of school sites all at once, despite constant messages that we should pick and choose priorities…"

"This is a great district vision and great people who are progressive - However, there needs to be more strategic coordination to make change without burning people out."

"I think the district funds the right initiatives: teacher leadership, social emotional learning, etc. I think the HOW of implementation is the issue.…"

Source: ERS OUSD Principal Survey 2015
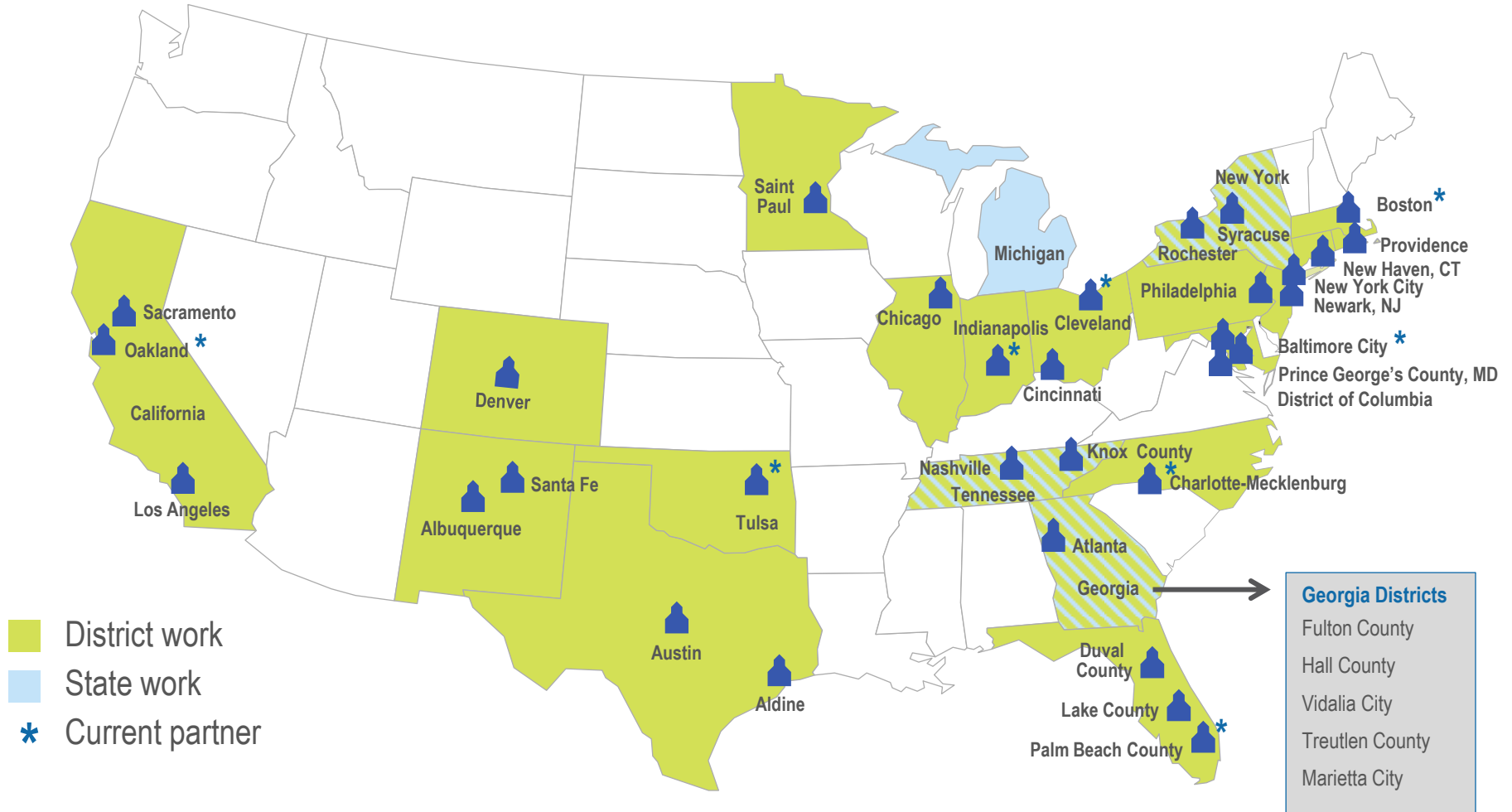
ERS Interim Report

Key Findings in OUSD

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

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

Map labels:
Saint Paul, New York, Boston *, Syracuse, Providence, Rochester, New Haven, CT, Michigan, Philadelphia, New York City, Newark, NJ, Sacramento, Chicago, Indianapolis *, Cleveland *, Baltimore City *, Oakland *, Prince George's County, MD, District of Columbia, California, Denver, Cincinnati, Los Angeles, Santa Fe, Knox County, Nashville, Charlotte-Mecklenburg *, Albuquerque, Tulsa *, Tennessee, Atlanta, Austin, Georgia, Aldine, Duval County, Lake County, Palm Beach County *

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

Project Objectives

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. To **inform and leverage the expertise of key stakeholders** around proposed changes and critical actions
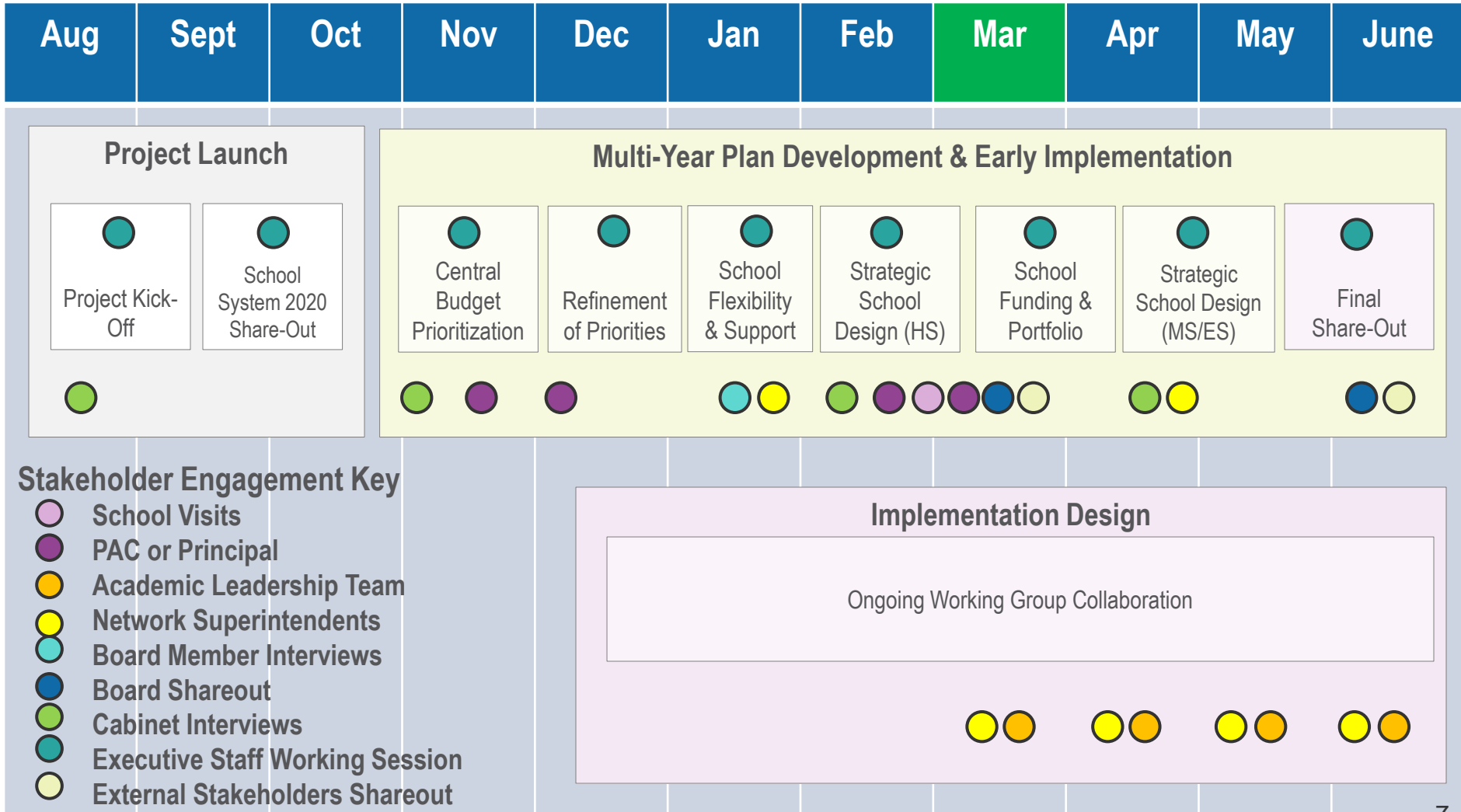
Our process integrates data analysis with feedback from leaders and stakeholders to provides a robust picture of resource use in the district

ANALYSIS

- 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

Strategic Resource Map

- Funding
- School Design
- Teaching
- School Support

Project Focus Areas & Key Questions

Areas of Focus	Key Questions
Central Spending	▪ What is the nature and magnitude of spending on central supports? ▪ What opportunities exist to improve efficacy of that spending or reallocate towards strategic priorities?
School Resource Flexibility	▪ What are the current constraints on school resource flexibility in OUSD? ▪ How can OUSD maximize resources and decision-making at schools?
Strategic School Design	▪ How do schools organize resources to support their student and academic priorities? ▪ What district- & school-level changes are needed to enable strategic school designs?
School Funding & Portfolio	▪ To what extent does OUSD's current funding system and school portfolio support its long-term goals? ▪ What changes are needed to achieve a strategic balance of equity, access, and programmatic diversity?

Project Road Map

Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June

Project Launch

Multi-Year Plan Development & Early Implementation

| Project Kick-Off | School System 2020 Share-Out | Central Budget Prioritization | Refinement of Priorities | School Flexibility & Support | Strategic School Design (HS) | School Funding & Portfolio | Strategic School Design (MS/ES) | Final Share-Out |

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

Implementation Design

Ongoing Working Group Collaboration

Process & ERS Agenda

1. **Review ERS work to-date and key emerging insights**
2. **OUSD leadership commentary/follow up**
3. **Board questions & feedback on follow up**

Focus Area	Summary of Emerging Insights
Overall investment level in schools	OUSD spends a smaller share of its resources on Instruction than national benchmarks, which is partially driven by higher central office spending
School support	Principals perceive significant gaps in clarity of central roles/expectations, alignment across different functions and overall quality/responsiveness of support
Maximize (HS) instructional time	A short school day and restrictive schedule structure in high schools limits opportunities for students to graduate college- and career-ready in 4 years

Investment in Schools

In SY14-15, OUSD spent ~$420M to educate its PreK-12 grade students…
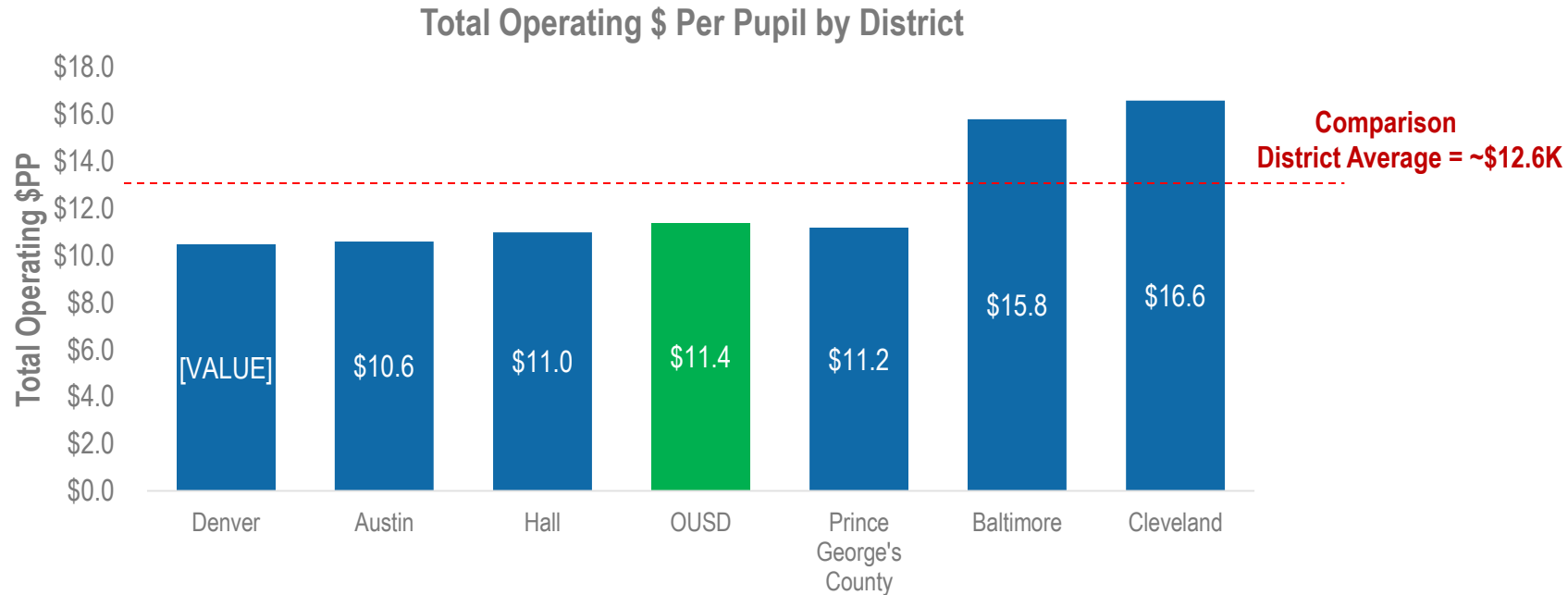

OUSD SY14-15 Operating Expenditures

$Per Pupil (k)	$14.6K	$1.6K	$0.5K	$0.4K	$0.2K	$0.2K	$0.4K	$11.4K

Source: ERS Analysis, 2014-2015 SY OUSD Expenditures

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

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

Total Operating $ Per Pupil by District

Comparison District Average = ~$12.6K

Chart values:
- Denver: [VALUE]
- Austin: $10.6
- Hall: $11.0
- OUSD: $11.4
- 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.
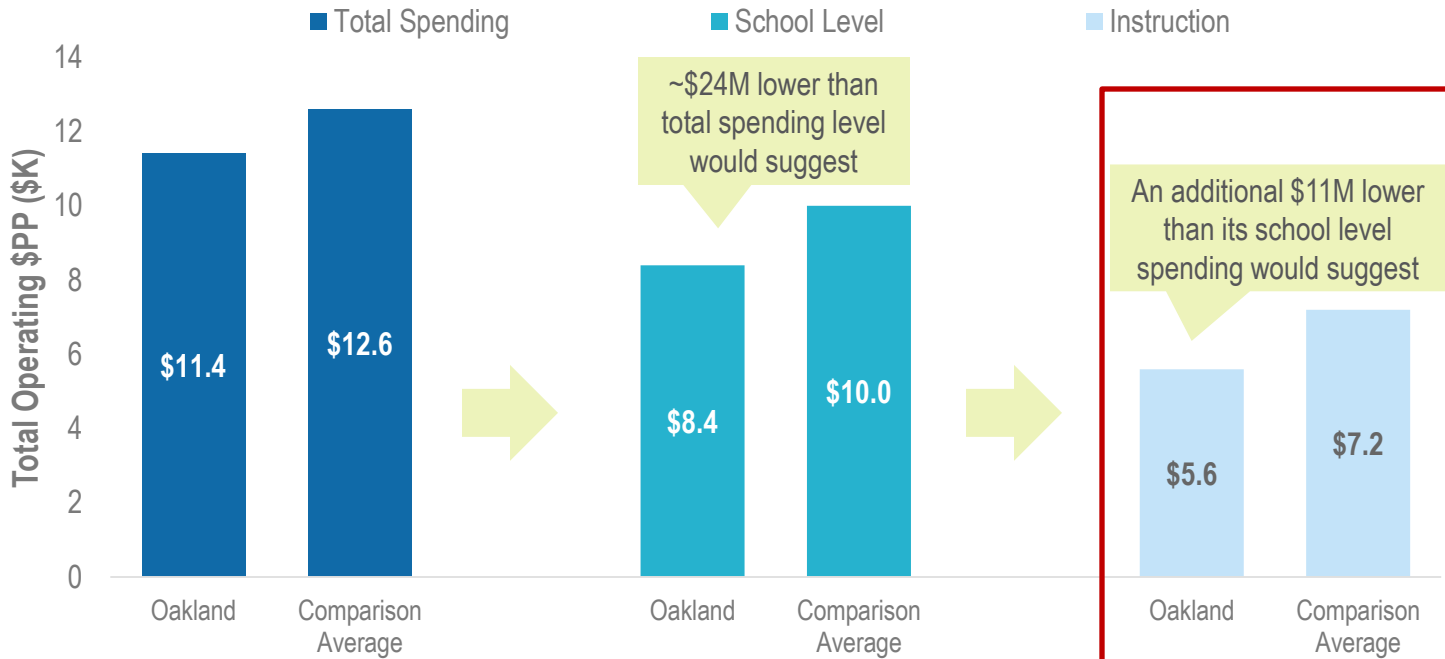
Sources: ERS Comparison Database, OUSD Financial Data from SY14-15

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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While OUSD's overall spending level is 90% of the comparison group, its investment in Instruction is just 78% of the comparison average and $35 million less than its overall spending level would suggest

Total Operating $ Per Pupil by District

■ Total Spending ■ School Level ■ Instruction

Y-axis: Total Operating $PP ($K), scale 0 to 14

- Oakland (Total Spending): $11.4
- Comparison Average (Total Spending): $12.6
- Oakland (School Level): $8.4
- Comparison Average (School Level): $10.0
- Oakland (Instruction): $5.6
- Comparison Average (Instruction): $7.2

Callout: ~$24M lower than total spending level would suggest

Callout: An additional $11M lower than its school level spending would suggest

$PP	Total Spending		School Level		Instruction Only
Difference (Comparison – OUSD)	**$1.2K**		**$1.6K**		**$1.6K**
OUSD as a % of Comparisons	**90%**		**84%**		**78%**

Source: ERS Comparison Database

Please see appendix for details on comparison districts and definition of Instruction.

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

In comments, principals highlighted the need for increased flexibility, differentiation, and investment

"Schools should be given [resources] and provided with a **menu of how to use those resources**: i.e. extended contract for before school tutoring, to pay for a school day intervention teacher, etc."

"We have done many things (i.e. hiring and budget) through **working creatively with the system** not through the system."

"Underfunded schools and multiple days off site has a huge impact on instruction…[we need to] **differentiate** professional development and pay teachers to come to school for PD 1 week before school starts."

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

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

Central Office Expenditure
($ Per Pupil)

$PP on Central Office (K)

Oakland	$1.5
ERS Comparison Average	$1.2
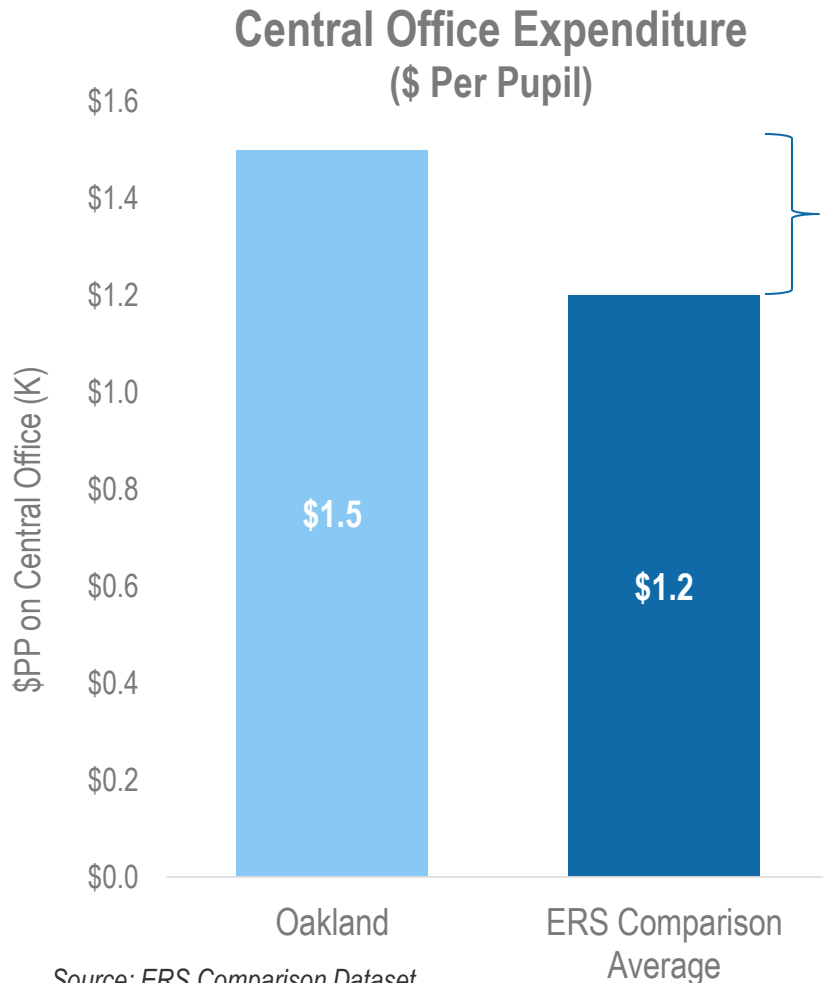
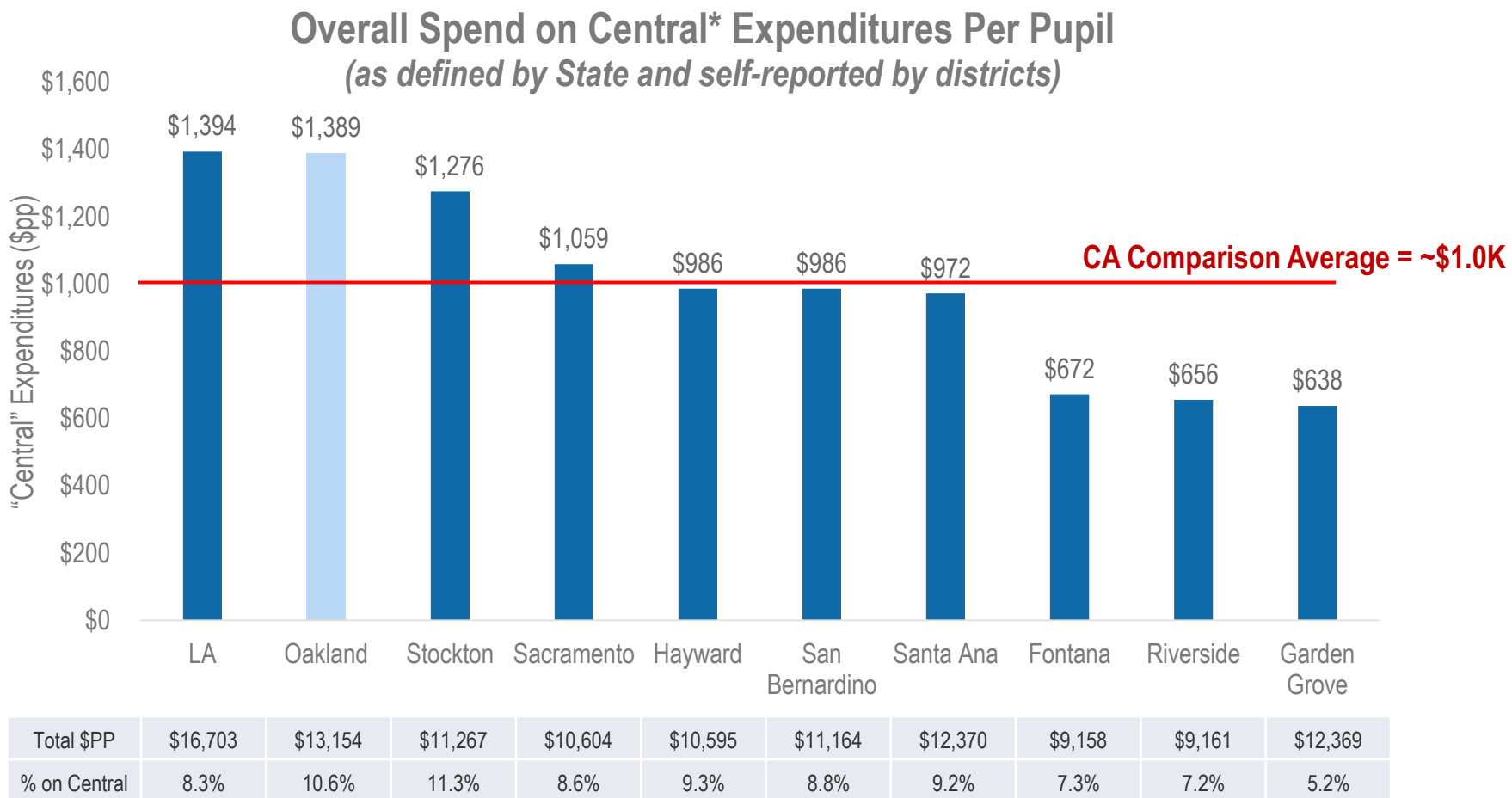**Contributing factors for the additional $325 per pupil centrally include:**

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

ERS will analyze the nature of school level spending and drivers in difference from comparison districts in upcoming sessions

Source: ERS Comparison Dataset

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

When we use state data to compare OUSD's central* spending to other CA districts, we see a similar trend to our national comparison

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
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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Investment in Schools – Takeaways and Next Steps

***Emerging Findings*:**

- At $11.4K per pupil, OUSD's total investment in "PK-12 Operating" spend is on the low end of large urban districts nationally
- OUSD's spending at the school level is $24 million lower than its total per pupil spending level would suggest
- OUSD's spending on Instruction at the school level is $35 million lower than its total per pupil spending level would suggest
- These differences are partly explained by a $325 per pupil higher investment in central administration than comparison districts

ERS Next Steps:

- Deeper analysis of school-level spending: What accounts for lower investment in Instruction? What role does school size play? How equitably are resources distributed across school? How equitable are amounts invested in Instruction across schools?
- Ongoing support for SY16-17 budget development process and prioritization of investments/reallocations

School Support

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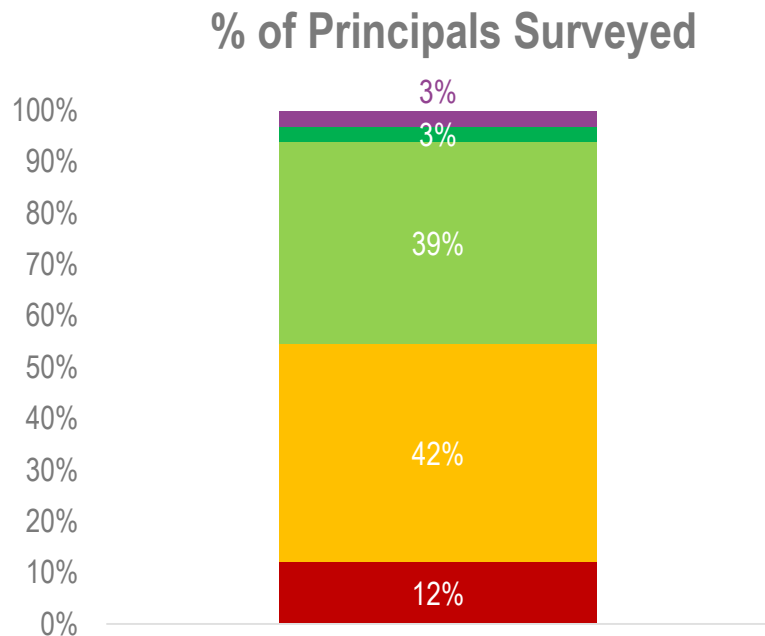
Overall, the district sets clear expectations around the types of supports provided to me centrally.

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

Legend: ■ 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…"

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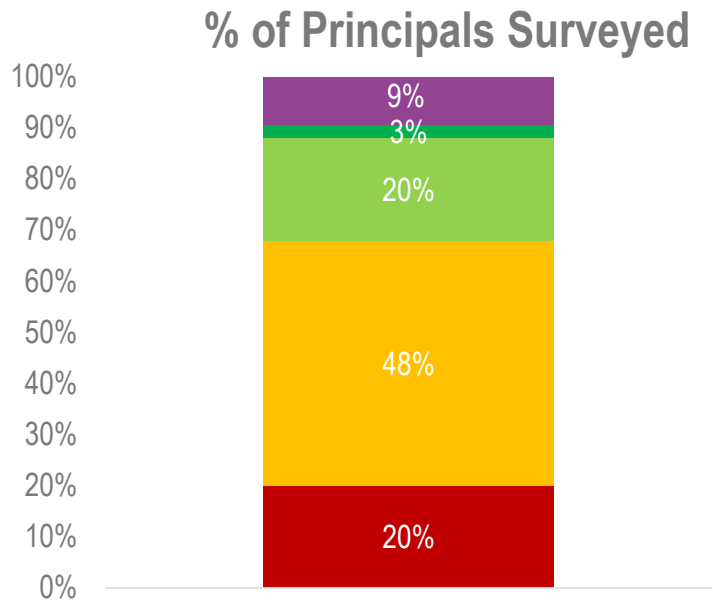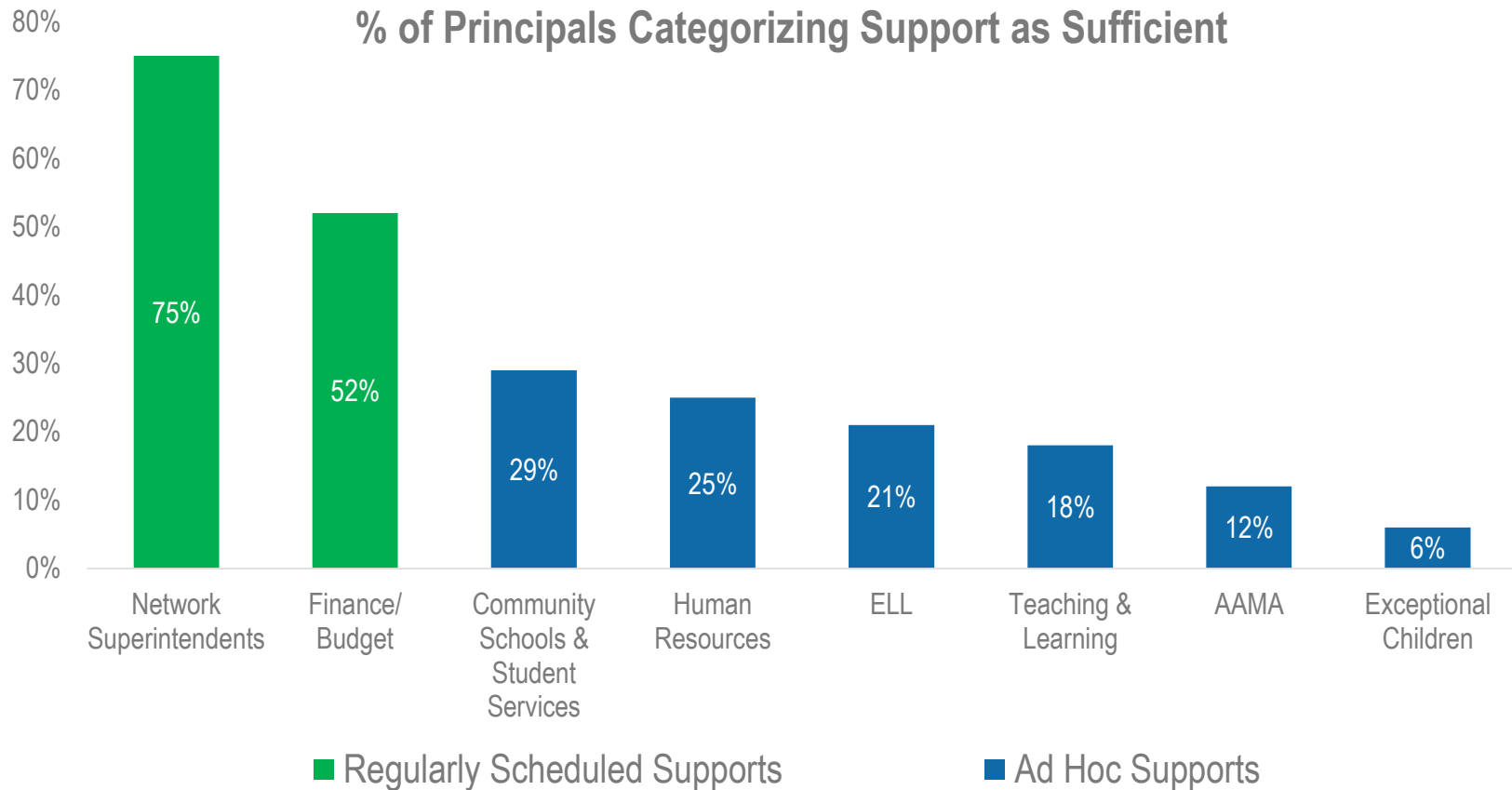
% of Principals Surveyed

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

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

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

20

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

% of Principals Categorizing Support as Sufficient
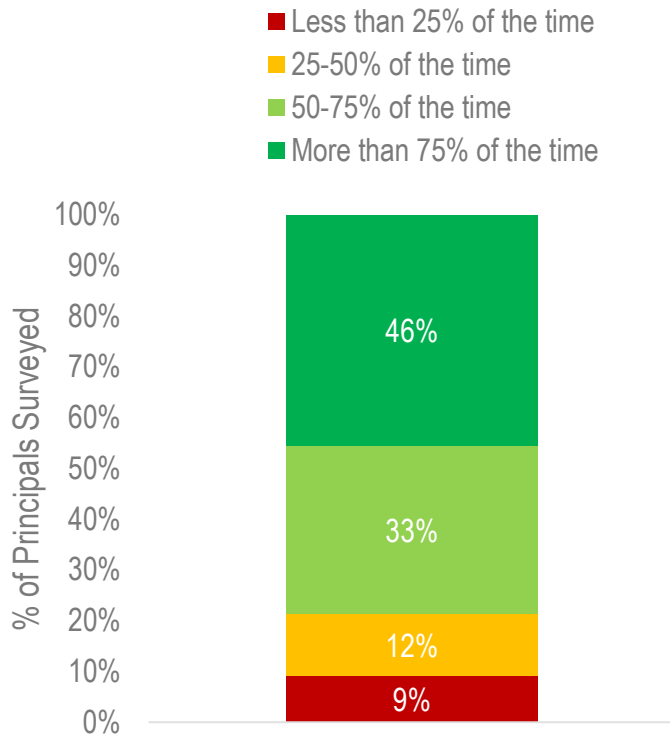
Network Superintendents	Finance/Budget	Community Schools & Student Services	Human Resources	ELL	Teaching & Learning	AAMA	Exceptional Children
75%	52%	29%	25%	21%	18%	12%	6%

■ Regularly Scheduled Supports ■ Ad Hoc Supports

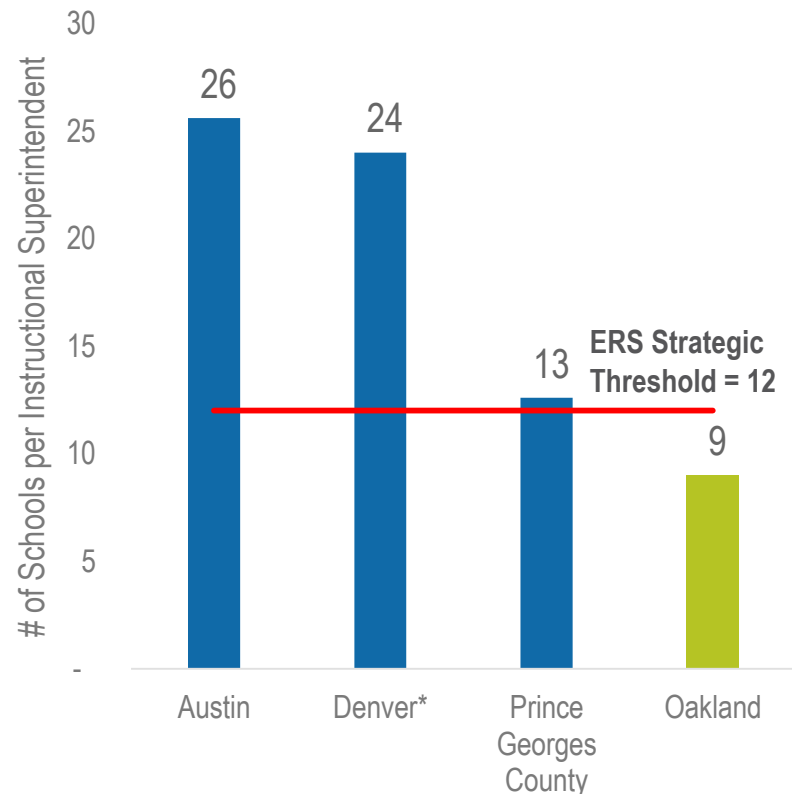*Source: 2015 ERS OUSD Principal Survey.*

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.

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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…

- ■ Less than 25% of the time
- ■ 25-50% of the time
- ■ 50-75% of the time
- ■ More than 75% of the time

% of Principals Surveyed

Value
46%
33%
12%
9%

of Schools per Network Superintendent or Deputy

# of Schools per Instructional Superintendent

City	Value
Austin	26
Denver*	24
Prince Georges County	13
Oakland	9

ERS Strategic Threshold = 12

Source: Principal Survey, ERS Comparison Database and ERS analysis

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

OUSD may seek to align other 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."

School Support – Takeaways and Next Steps
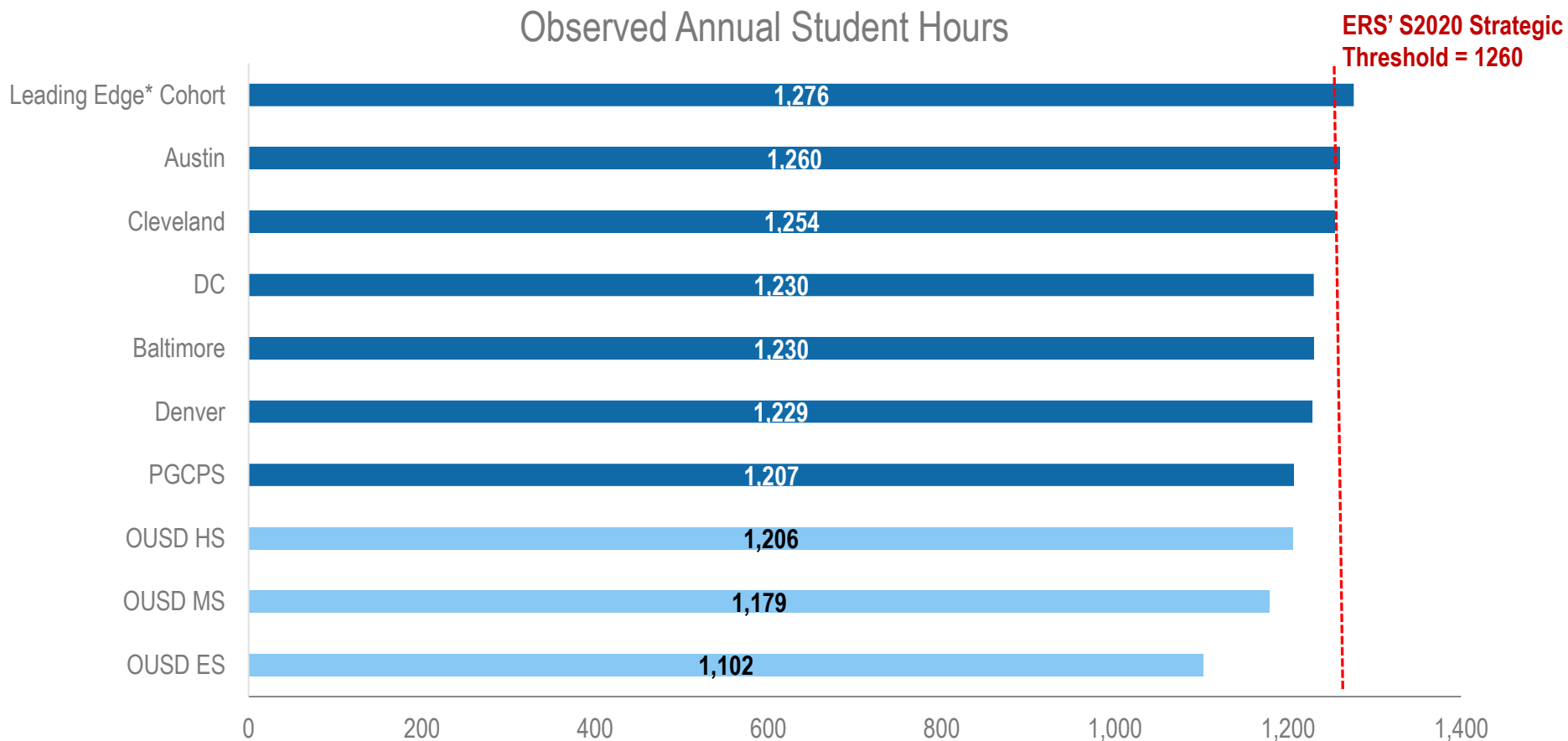
***Emerging Findings*:**

- Principals perceive significant gaps in:
  - Clarity of central roles/expectations
  - Alignment across different functions
  - Overall quality/responsiveness of support
- Principals are most satisfied with nature and structure of support from network supervisors
- OUSD investment in network structure is sufficient to provide strategic spans of control

***ERS Next Steps*:**

- Ongoing support to the ALT around organizational redesigns to foster strong, network-driven support for schools

Instructional Time

The OUSD school year is shorter than comparison districts, and MS and ES schools are well below ERS' strategic threshold

Observed Annual Student Hours

ERS' S2020 Strategic Threshold = 1260

| District	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

(Axis: 0, 200, 400, 600, 800, 1,000, 1,200, 1,400)

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 average instructional minutes for 30-45 min per day for passing time and lunch to compare minimum annual student hours.

* Miles, Karen Hawley, & Shields, Regis Anne (2008).Strategic Designs: Lessons from Leading Edge Small High Schools. Retrieved from https://www.erstrategies.org/library/strategic_designs_lessons_from_leading_edge_small_high_schools

In the absence of longer school days, only a subset of principals across all school levels report sufficient time for students in all content areas

% of Principals who Agreed or Strongly Agreed that: **the master schedule provides sufficient time for students to engage in…**

■ Core ■ Non-Core/Elective ■ Social-Emotional Supports
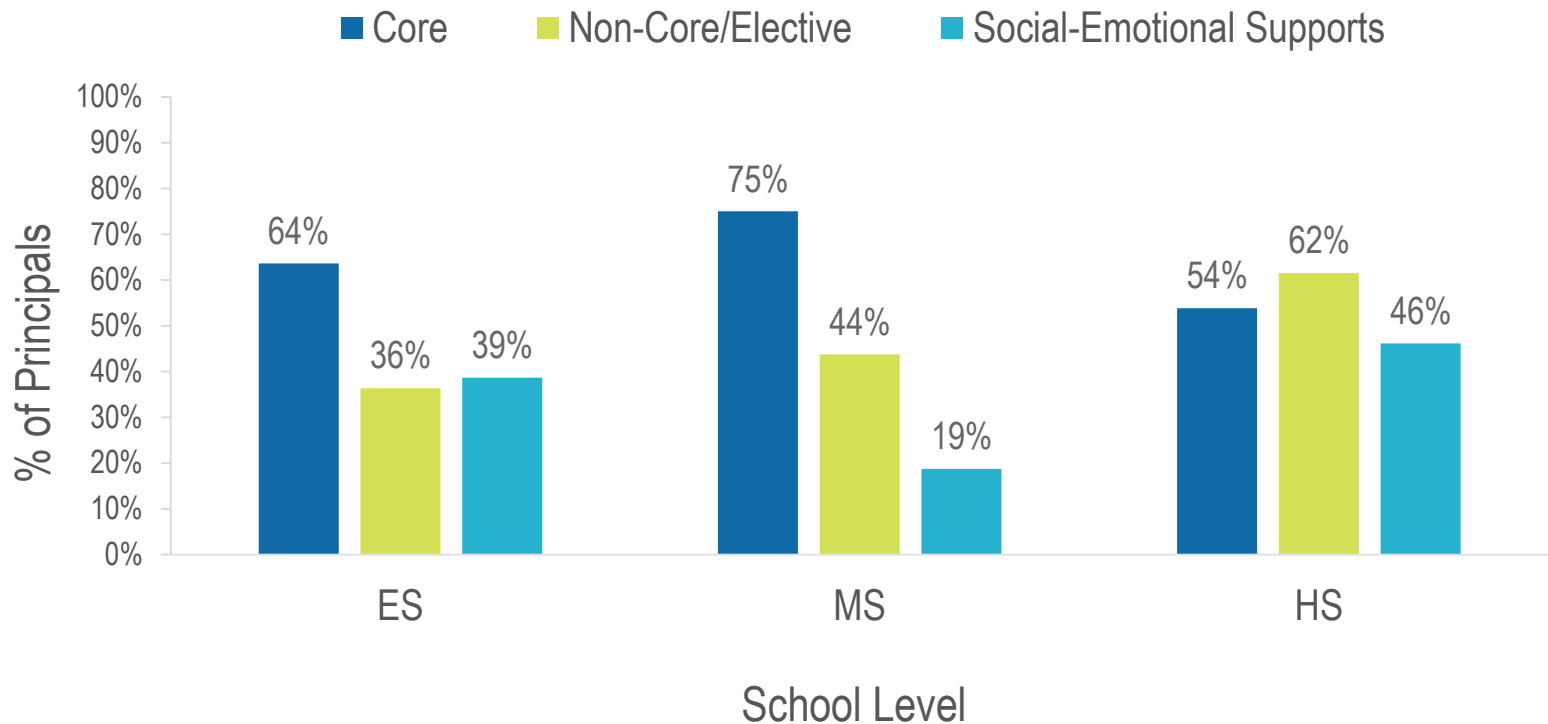
Source: OUSD Principal Survey

27

…and variations in annual student hours result in some students receiving over a month more of instructional time, particularly at the MS level

Annual Difference in Instructional Hours of
Max Day – Min Day, by School Level
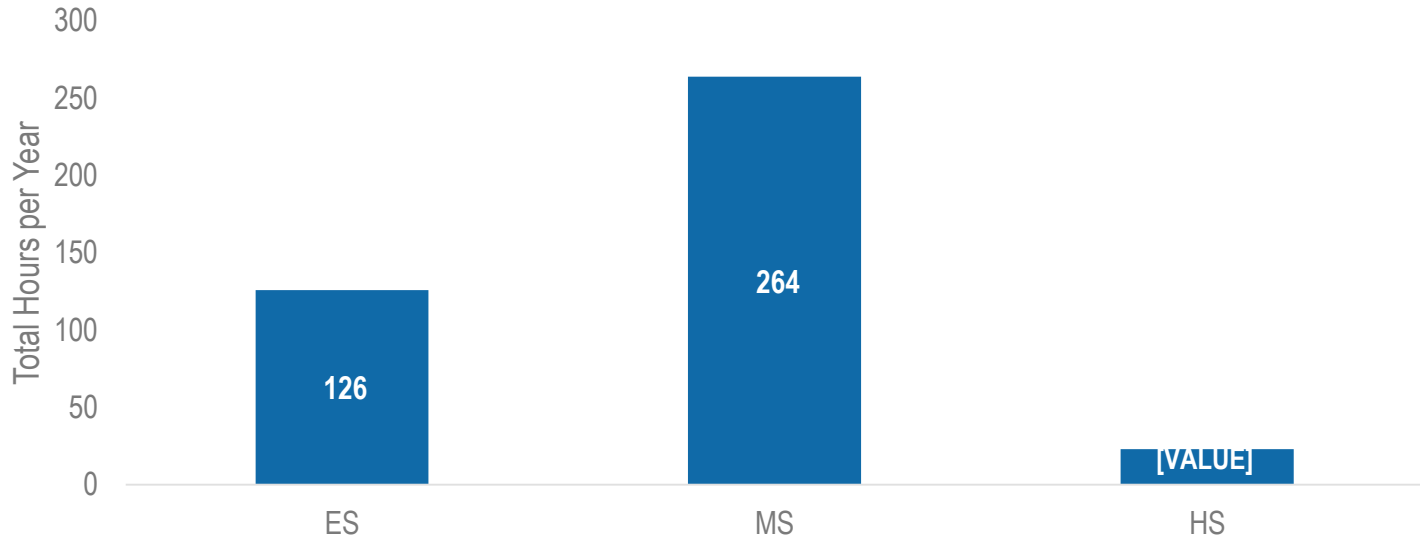
	ES	MS	HS
Additional Minimum Days of Instructional Time (based on 5 hr. day)	25	50	5

Source: 2014-2015 Instructional Minutes Audit conducted by OUSD & ERS analysis

Given limited time and variations in time overall, our analysis of time in HS looked at how 9th graders are set up for cohort graduation

To do so, we explored 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 master schedule only allows for 240 credits

Share of OUSD HS by Credits Available
Given Schedule

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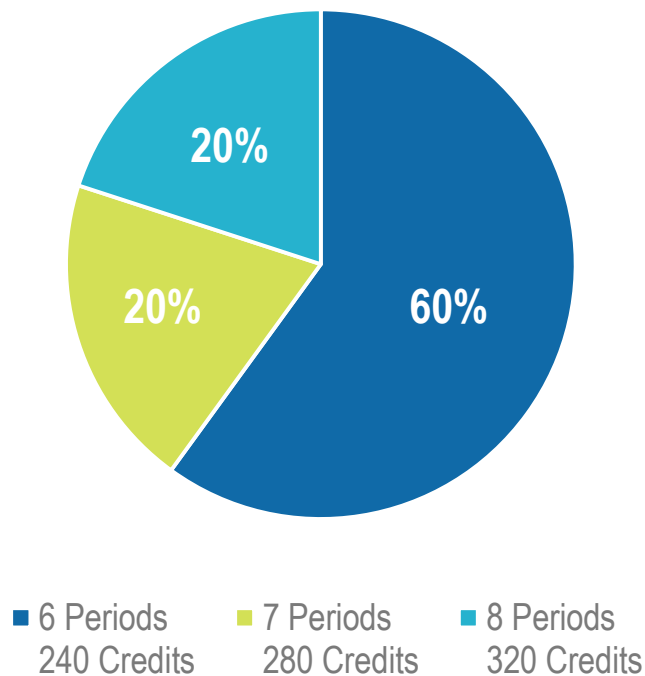
Additional periods provide more opportunity for credits, social emotional support, and other interventions

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

30

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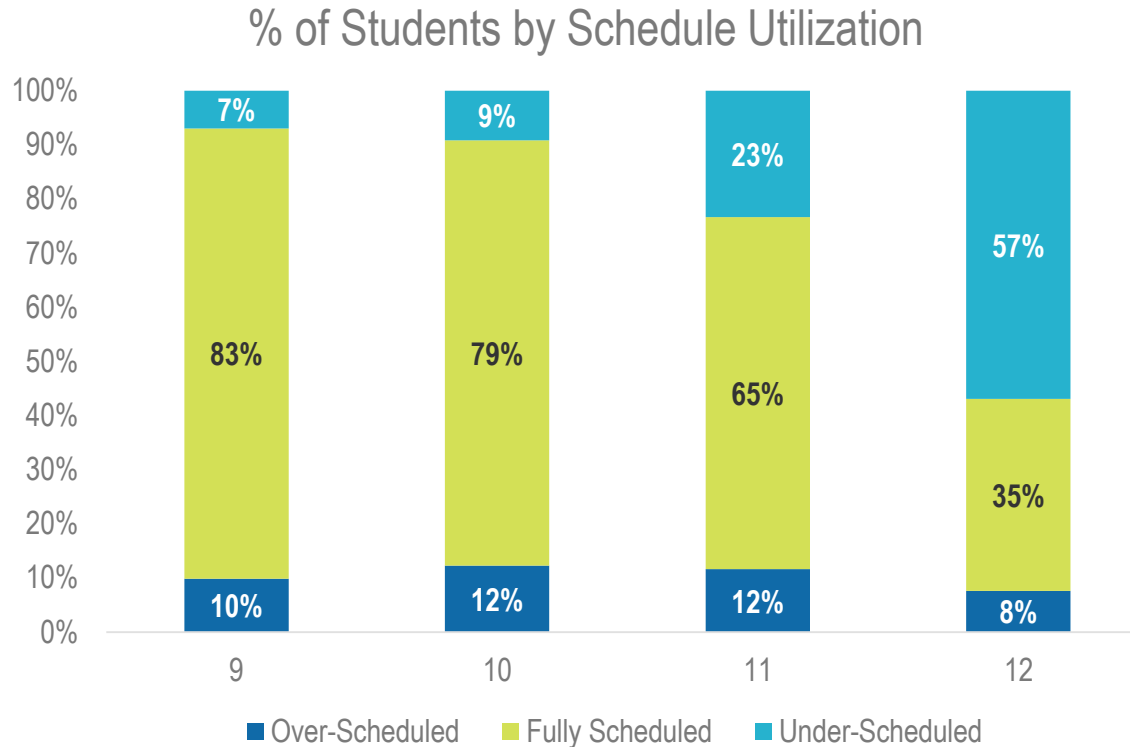
96% of time overall is scheduled as over-scheduled students compensate for those under-scheduled

Over-Scheduled ▪ Fully Scheduled ▪ Under-Scheduled

	9	10	11	12
Average Learning Time Loss for Under-Scheduled Students (Periods)	**1.0**	**1.1**	**1.1**	**1.7**

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

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

Average % of Credits Completed

Note: Significant variation exists across schools. See Appendix B.
Source: OUSD SY2014-2015 Historical Transcript data, ERS Analysis.
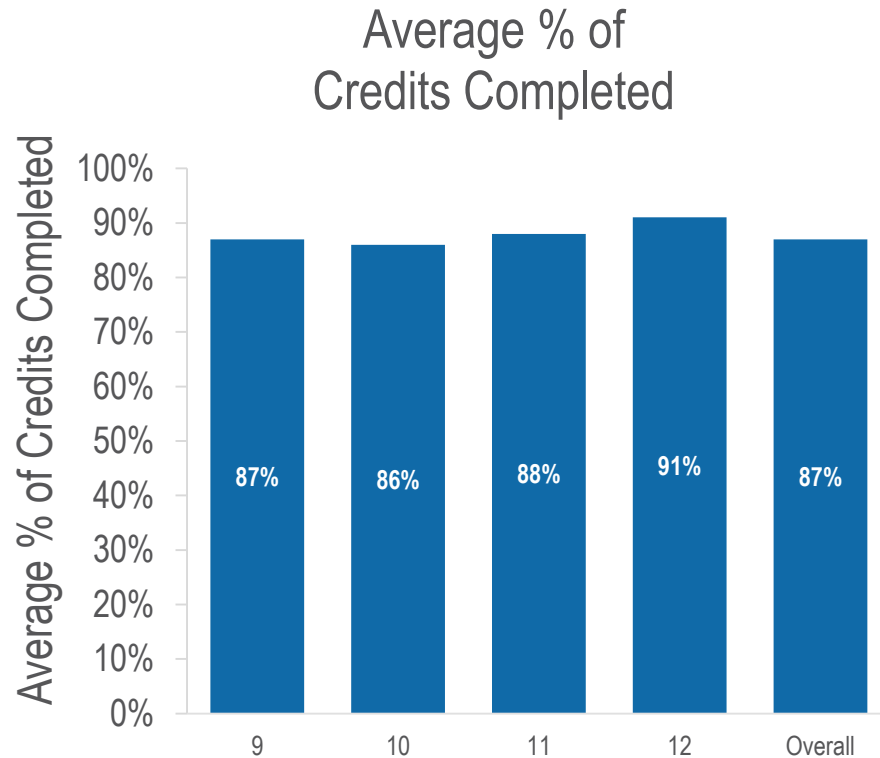
60% of the students not completing credits in 9th grade lose credit in ELA, Math, or both among other subjects

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
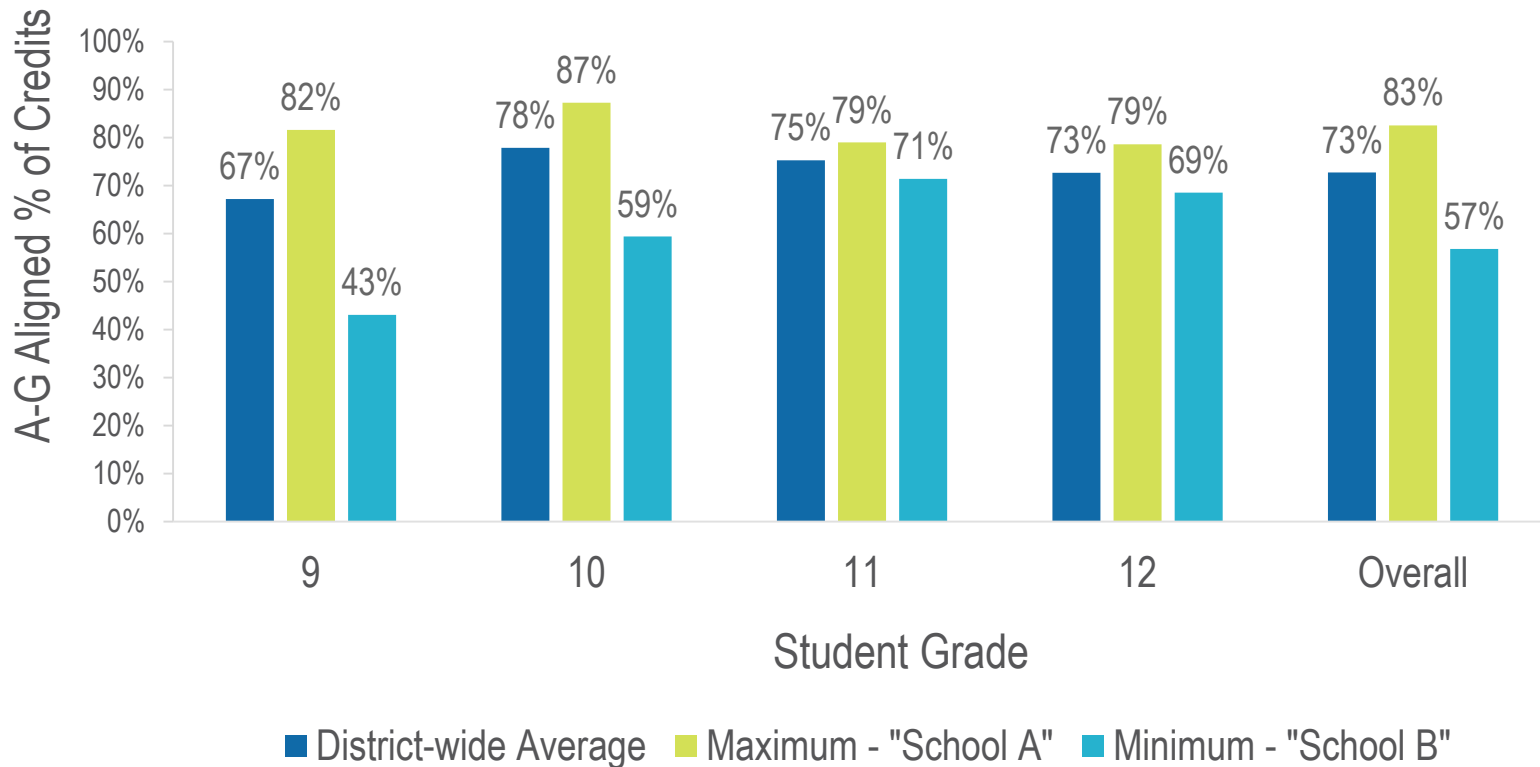
Average for Alternative and Continuation Schools is 67%.

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

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.

Only 54% of OUSD high schools 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

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

35
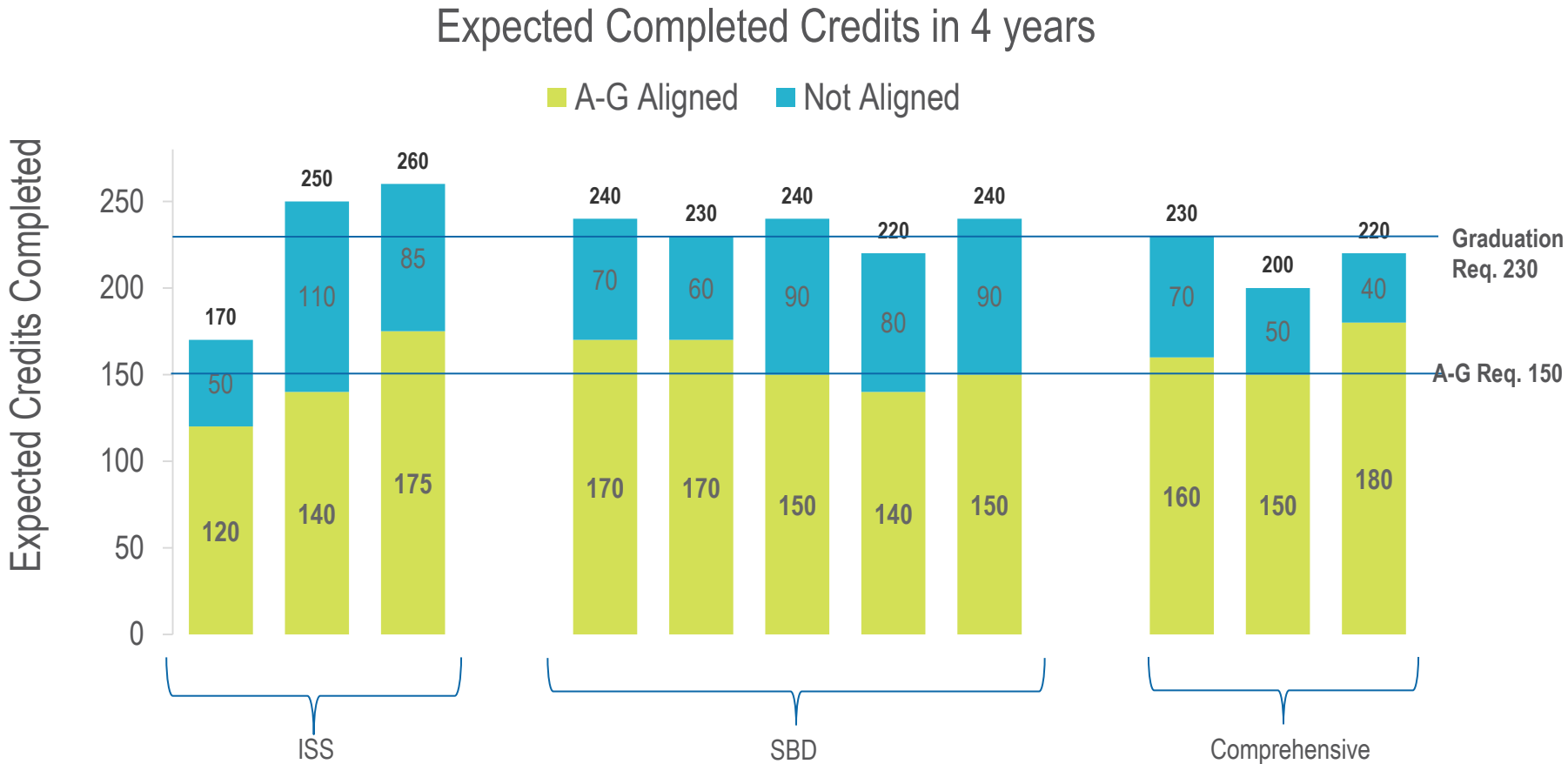
Instructional Time – Takeaways and Next Steps

Emerging Findings:

- Total instructional time in OUSD is significantly less than in other districts studied, particularly at the ES level
- Only 54% of OUSD HS are set up for a typical student to meet the graduation and A-G requirements in 4 years given:
  - Typical master schedule only allows for 240 credits
  - A significant number of students don't take full course loads (including 57% of 12th graders)
  - Year over year, students complete only 87% of attempted credits
  - A-G course taking patterns vary significantly across HS

ERS Next Steps:

- Analysis of school-level resource use to include OUSD middle schools
- Ongoing scheduling support for OUSD HS network

The Path Forward

Project Road Map

Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June

Project Launch

Multi-Year Plan Development & Early Implementation

Project Kick-Off

School System 2020 Share-Out

Central Budget Prioritization

Refinement of Priorities

School Flexibility & Support

Strategic School Design (HS)

School Funding & Portfolio

Strategic School Design (MS/ES)

Final Share-Out

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

Implementation Design

Ongoing Working Group Collaboration

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Process & ERS Agenda

1. **Review ERS work to-date and key emerging insights**
2. **OUSD leadership commentary/follow up**
3. **Board questions & feedback on follow up**

Focus Area	Summary of Emerging Insights
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School support	Principals perceive significant gaps in clarity of central roles/expectations, alignment across different functions and overall quality/responsiveness of support
Maximize (HS) instructional time	A short school day and restrictive schedule structure in high schools limits opportunities for students to graduate college- and career-ready in 4 years

Appendix

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

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 ($420M) 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

~72% School Attributed

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

Use →

Function

Instruction
- 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

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

District	Enrollment	PreK-12 Operating $PP (Adjusted)	%FRL[1]	%ELL[2]	%SWD[3]	Average School Size	Regional Cost Adjust.*
Prince George's County	123,476	$11,197	60%	13%	9%	611	1.1
Austin	86,512	$10,563	63%	27%	10%	676	0.9
Baltimore	83,800	$15,808	77%	3%	15%	439	0.9
Denver	76,884	$10,525	79%	27%	11%	620	0.9
Cleveland	40,072	$16,549	100%	7%	19%	304	0.8
Hall County	25,939	$11,017	58%	14%	10%	786	0.8
Oakland	**37,147**	**$11,388**	**73%**	**31%**	**10%**	**432**	**1.0**
Comparison Average	**72,781**	**$12,610**	**73%**	**15%**	**12%**	**573**	**0.9**

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

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