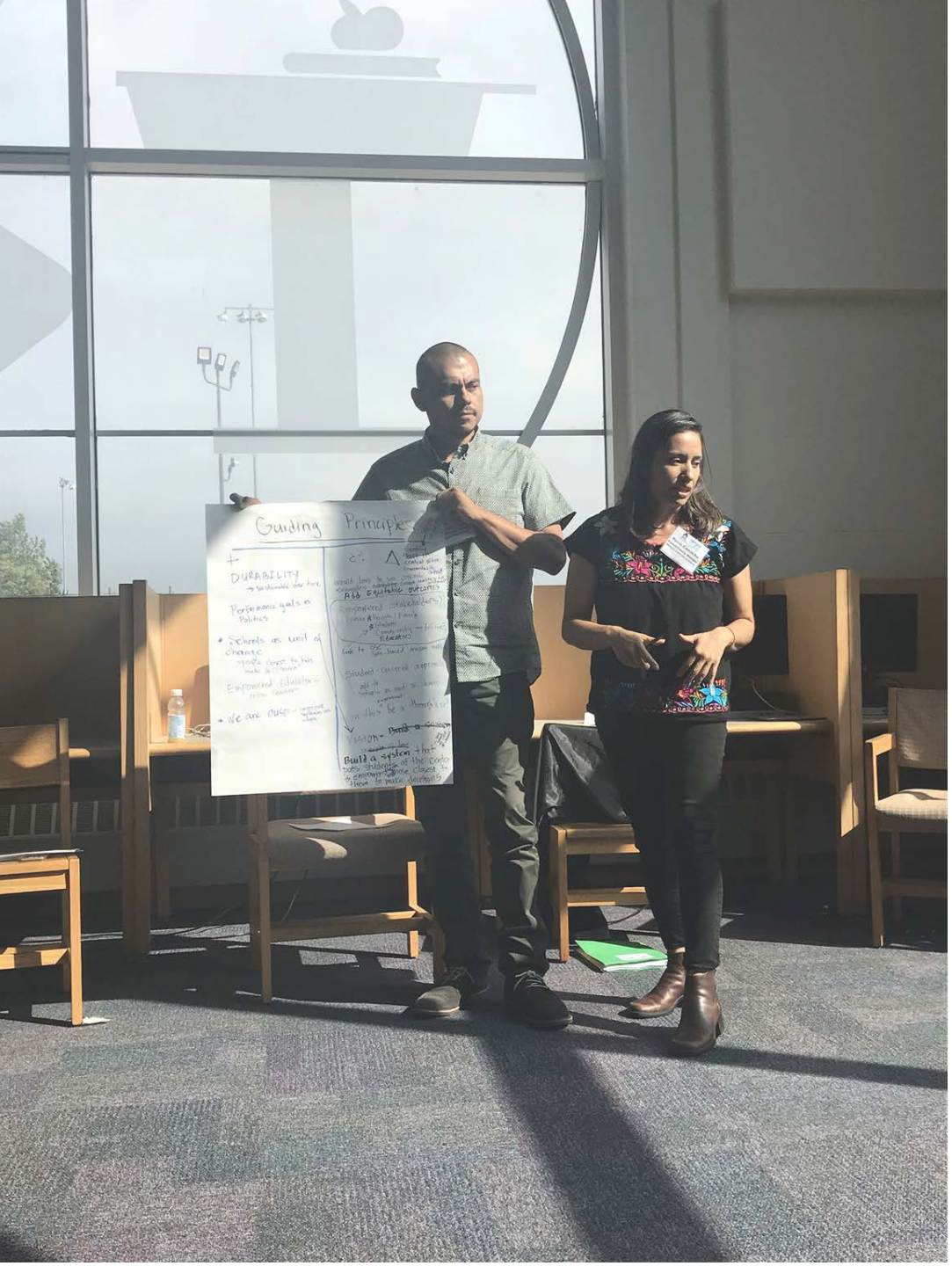


Design Team Presentation

Fiscal Vitality Committee
Thursday, October 18th, 2018

Objectives

- Provide an update on the Design Team's work to date and key lessons learned
- Discuss how our work connects to and can potentially build synergy with the Fiscal Vitality Committee
- Gather feedback and input to inform our work ahead

Feedback

Questions	Suggestions
Warm Feedback	Cool Feedback

Please keep track of your thoughts and feedback throughout the session and share with us (throughout the session & at the end of the meeting)!

Connections to Special Committee on Fiscal Vitality Goals

- Explore Depth of Budget Deficit
- **Build Shared Knowledge**
- **Alignment with Theory of Action**
- **Student-centered Budgeting**
- **Recommendations to Move Forward**

History of Our Work to Date

February 2018
Denver Study Trip

August - September
Design Team Project Plan Launched, Design Team Recruited

October 18th
Engagement with the Fiscal Vitality Committee

November 2018
Provide report and proposal to Superintendent and Board

Fall 2017 - 2018

Autonomies Working Group begins to explore systems and structures that provide schools with greater autonomy over people, time, money, and program.

Spring - Summer 2018

Autonomies Working Group develops proposal to Superintendent Kyla Johnson-Trammel to launch the Learning Lab Network Design Team in order to continue our inquiry and develop a proposal for a pilot to test a system of autonomy and accountability for Oakland.

October 4 - 8th

Massachusetts Study Trip to explore and learn about school systems designed to provide greater site-based decision making and higher accountability, including Springfield, Lawrence, and Boston.

October - November

Design Team to continue research and inquiry, as well as engaging stakeholders about what we have learned.

Design team to develop a set of recommendation to the OUSD board and administration based on our findings in order to inform the implementation of BP6006 and other important district priorities.

Evolution of Our Learning and Focus

What are autonomies? **What are mechanisms for leveraging durable autonomies for (some) OUSD schools**?

Autonomies Working Group

Fall 2017-May 2018

How might we **leverage and pilot autonomies for (some) OUSD schools while also serving as a space to test and innovate** in service of key OUSD priorities?

Learning Lab Network Design Team

May - October 2018

How might we **redesign and align our district and system(s) towards a coherent theory of action** that works in service to students and schools?

(TBD) District Redesign Team?

October 2018

Our Vision:

OUSD will become an effective and aligned school system that puts students at the center and empowers those closest to students - educators, families, and the students themselves - to make decisions about people, time, program, and money in order to achieve transformational outcomes.

Learning Journey Key Lessons

- **Lesson #1: A clear theory of action -- with coherent and aligned strategy, systems, and support structures -- is an essential starting place**
- **Lesson #2: OUSD's policy history and Governance Theory of Action demonstrates a preference for greater site-based autonomy and accountability**
- **Lesson #3: Our District's model and systems are not YET, however, aligned to the board adopted Theory of Action and policies**
- **Lesson #4: There is a lot to learn from districts that have adopted theories of actions, systems, and strategies designed to increase autonomy & accountability for district schools**
- **Lesson #5: Autonomy & accountability models may hold promising solutions for Oakland's current pain points**
- **Lesson #6: Together, we can use our lessons learned to inform our design principles moving forward to support the critical redesign of the district that can result in both fiscal vitality and improved student outcomes**

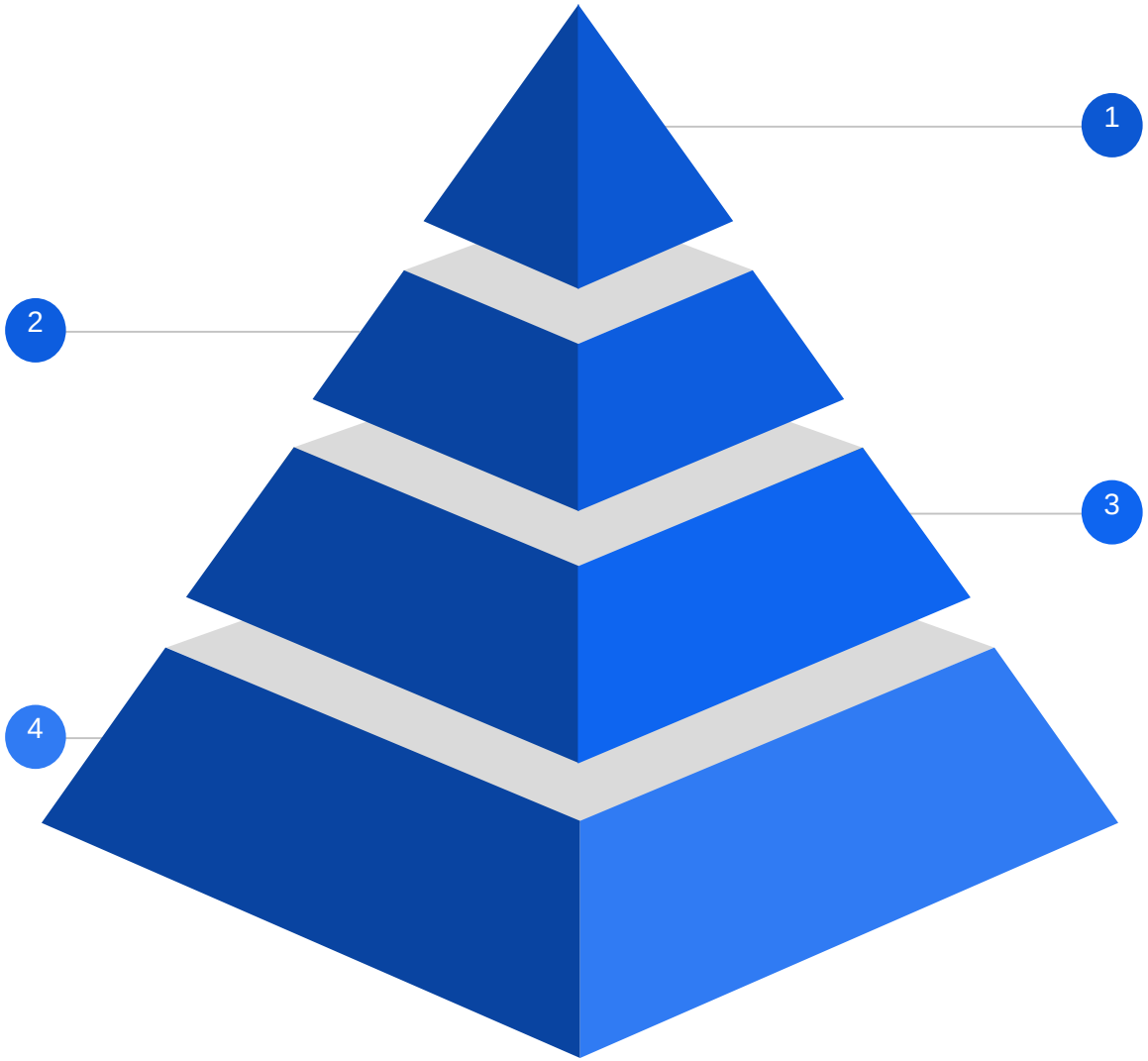
Learning Journey Lesson #1: A clear theory of action -- with coherent and aligned strategy, systems, and support structures -- is an essential starting place

Shared Theory of Action

A district must have a shared and consistent theory of action that guides all of its actions- from its policies to the design of its model and the implementation of its systems, structures and practices. Stakeholders across the system should understand and communicate this theory of action, particularly the organization's leaders.

Coherent District Model

The district's model needs to be coherently structured and operated in alignment with the organization's theory of action.



Aligned Policies and Regulations

The district's policies and administrative regulations must be aligned to its theory action, and should be developed to ensure that the district's model is coherent and consistent with the theory of action.

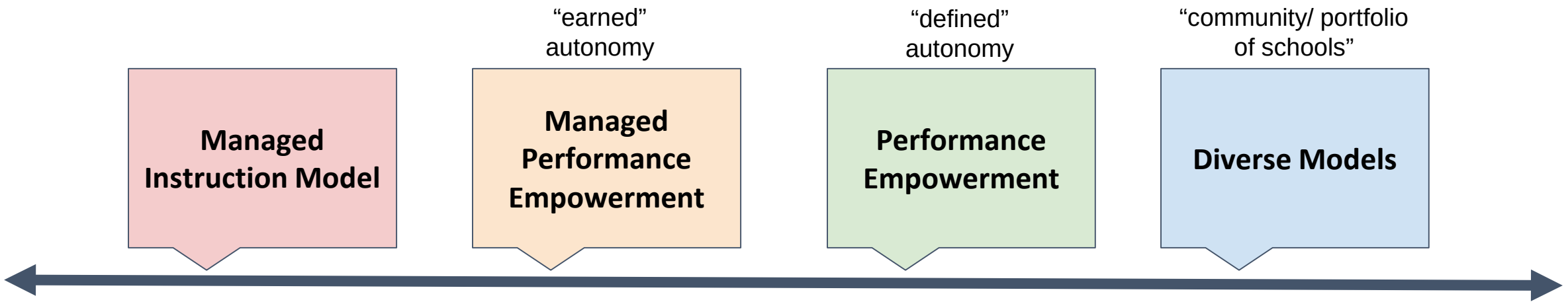
Consistent Systems, Structures, Labor Contracts and Practices

The systems, structures, CBAs/contracts, and practices of a district must support and be supported by its model, policies, and theory of action.

Archetype	Definition
Managed Instruction	From this perspective, the **district is the unit of change**, and the entire district is built around an **aligned instructional system.** Most decisions—instructional, operational, and financial—are made by central office.
Managed Performance / Empowerment (aka "earned" autonomies)	Autonomy is balanced with accountability, but **schools are typically not given the freedom and flexibility to make instructional, operational and financial decisions until performance is demonstrated**, and they are not left to themselves to achieve high performance.
Performance Empowerment (aka "defined" autonomies)	Decision-making authority regarding **instruction and school operations** is granted to individual schools while central office provides training and tools to schools to enable them to operate independently. In return for this empowerment, schools are accountable for results (including, but not limited to, demonstrating improvement in student learning, operational and financial effectiveness, student safety, and stakeholder satisfaction).
Diverse Models (aka "portfolio or community of schools")	The Diverse Models archetype (also known as a "Portfolio of Schools" or "community of schools" design) is a combination of one or more of the models above. **These models tend to provide more robust site-based decision making for some to all of district schools across the city.** In addition, these models may also provide opportunities to bring charters in closer collaboration with (and control by) the district. This model provides an opportunity for a range of differentiated options for schools to choose from when it comes to site-level autonomy and accountability for outcomes.

Continuum of the Archetypes of District Theories of Action

Adapted based on Katzir and McAdams: The Redesign of Urban School Districts: Case Studies in Urban School Governance (2013)



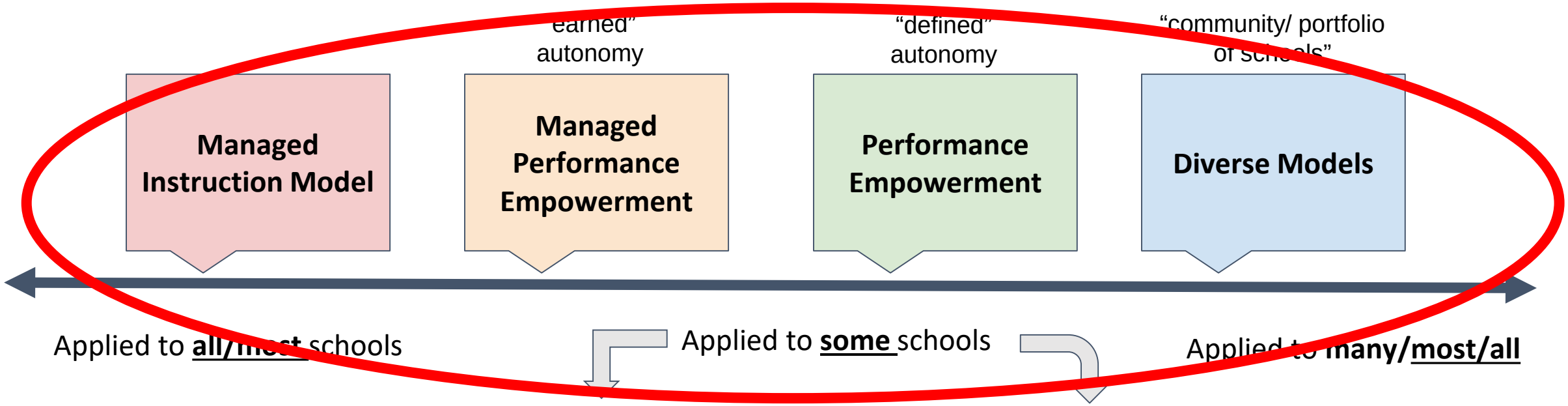
Applied to **all/most** schools

Applied to **some** schools

Applied to **many/most/all**

Lowest Site Based Decision Making	Some Site Based Decision Making	Greater Site Based Decision Making	Highest Site Based Decision Making
Highest Centralized Control & Support	Some Centralized Control & Support	Less Centralized Control & Support	Lowest Centralized Control & Support
Central Office focuses on school **INPUTS**		Central Office focuses on school **OUTPUTS**	
Most School Homogeneity	Some Model School Homogeneity	More Model School Diversity	Most Model School Diversity

Oakland's Practices and Systems Employ Some of All of the ToA



Lowest Site Based Decision Making	Some Site Based Decision Making	Greater Site Based Decision Making	Highest Site Based Decision Making
Highest Centralized Control & Support	Some Centralized Control & Support	Less Centralized Control & Support	Lowest Centralized Control & Support
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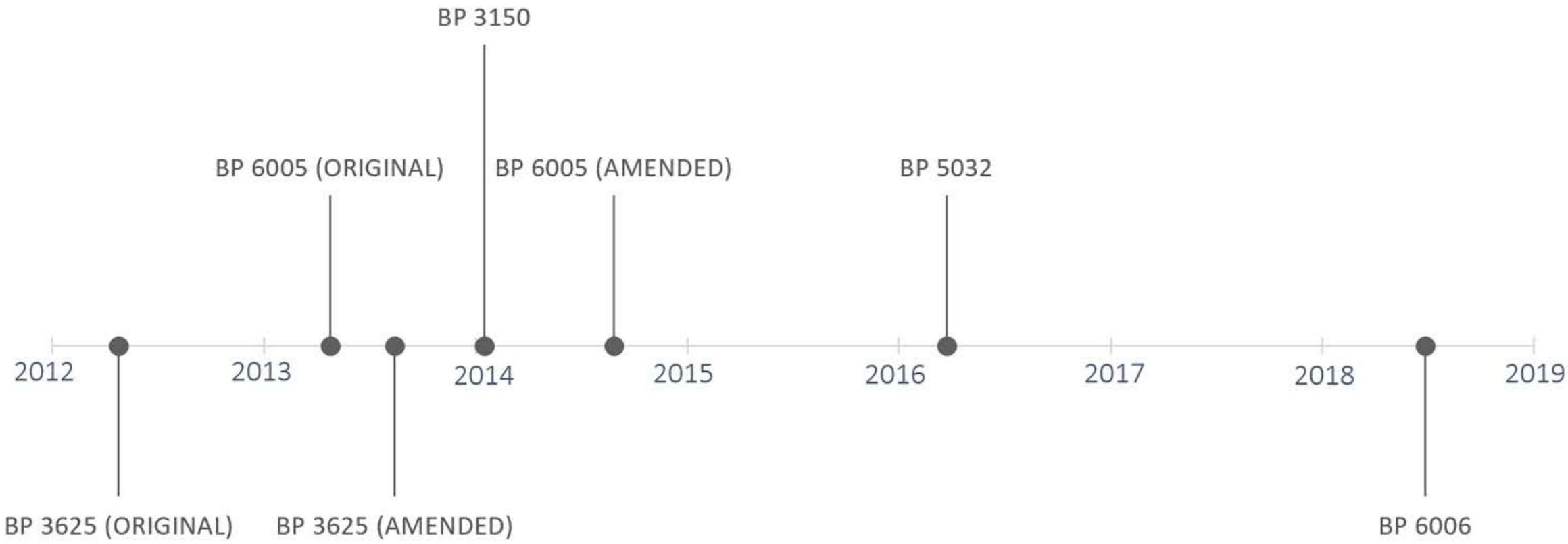
OUSD's Policy Timeline

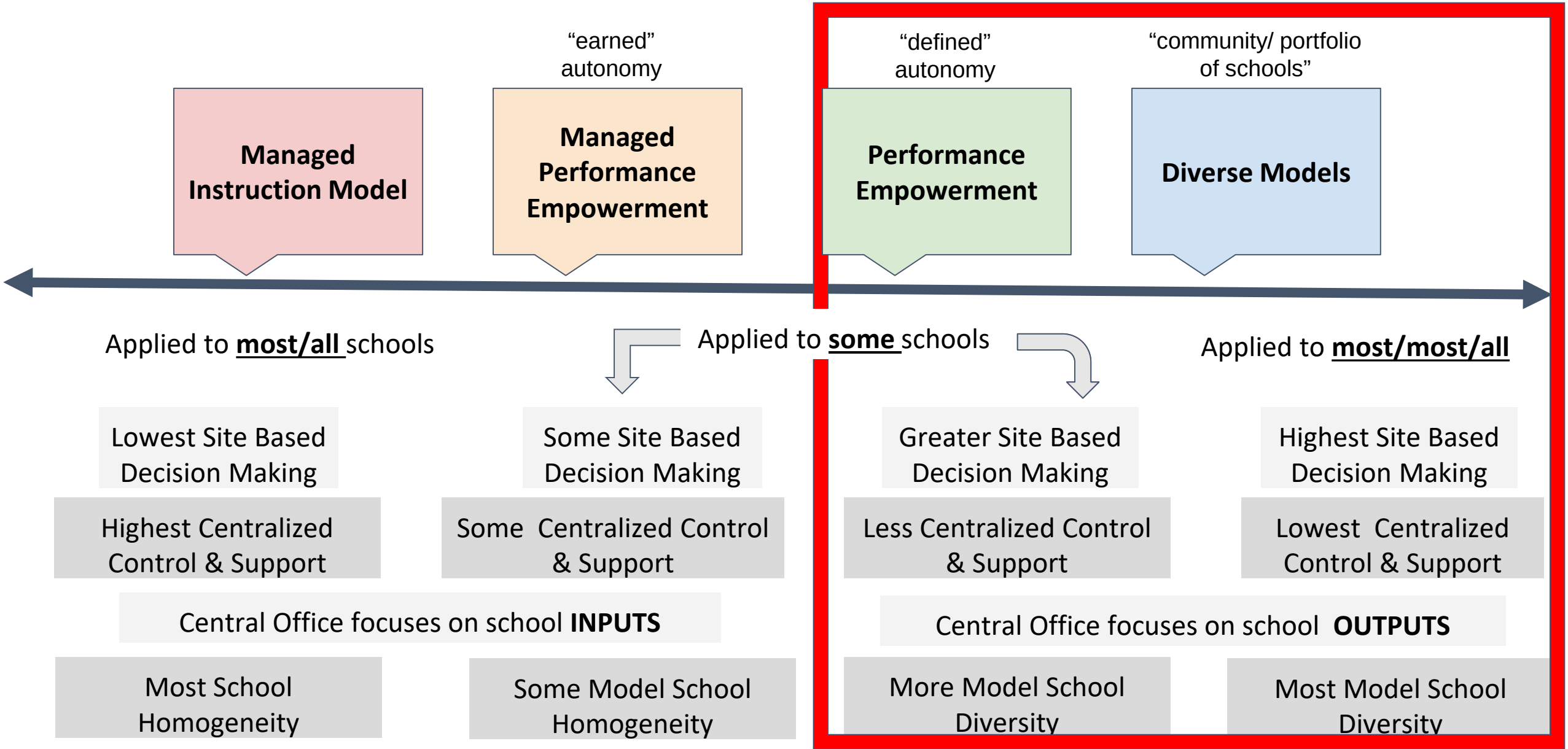


- **BP 3625:** Site-based Decision-making
- **BP 3150:** Results-Based Budgeting
- **BP 6005:** Quality School Development
- **BP5032:** Equity Policy
- **BP 6006:** Quality School Development: Community of Schools

OUSD's Governance Theory of Action

#	Short Description	Premise
1	**Data-Driven Decisions**	IF we consistently **apply quality data in making decisions about high quality and effective academic and social support** for students,
2	**Maximize school site decision making**	AND in service of high and equitable standards and outcomes for students, we **maximize school site-based decision-making regarding staffing, finances, calendars, and programs**,
3	**High-quality Instruction**	AND we ensure that there is **high-quality and effective instruction** in every classroom that results in high-quality learning for every student,
4	Diverse providers	AND to ensure high quality schools in every neighborhood, we **partner with diverse providers** in alignment with our policies,
5	Facilities	AND we ensure that all **facilities** are used in service of quality outcomes for students, including constructing and maintaining facilities in accordance with principles of sustainability,
6	**Sustainable central office and portfolio**	AND we apply data in ways that maximize fiscal and academic opportunities by operating a **central office and the number and type of schools that we can sustain over time,**
7	Community Partnership	AND we include and **partner with the community and families** to ensure quality options in each neighborhood throughout Oakland,
8	**Equitable access**	AND we prioritize **equitable allocation of resources across the district based on need**, recognizing that students come to school needing different resources and supports,
9	Then	THEN Oakland public schools will operate on principles of equity and ensure that all students have the academic, social, and fiscal supports that they need to succeed.

Learning Journey Lesson #2: OUSD's policy history and Governance ToA demonstrates a preference for greater site-based autonomy and accountability



Learning Journey Lesson #3: Our District's Model and Systems Are Not YET Aligned to the Board Adopted Theory of Action and Policies

Shared Theory of Action

A district must have a shared and consistent theory of action that guides all of its actions- from its policies to the design of its model and the implementation of its systems, structures and practices. Stakeholders across the system should understand and communicate this theory of action, particularly the organization's leaders.

Coherent District Model

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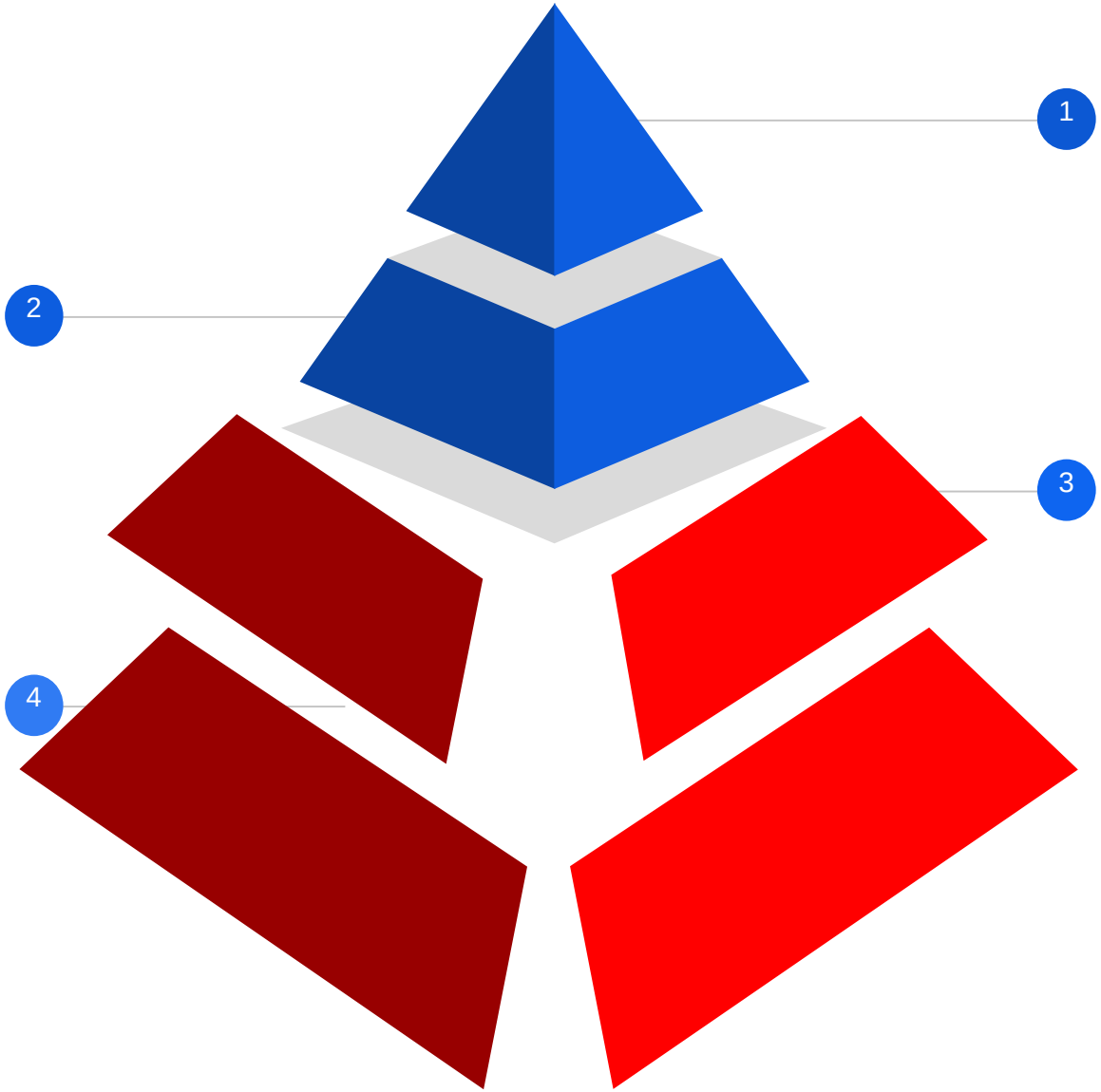

Aligned Policies and Regulations

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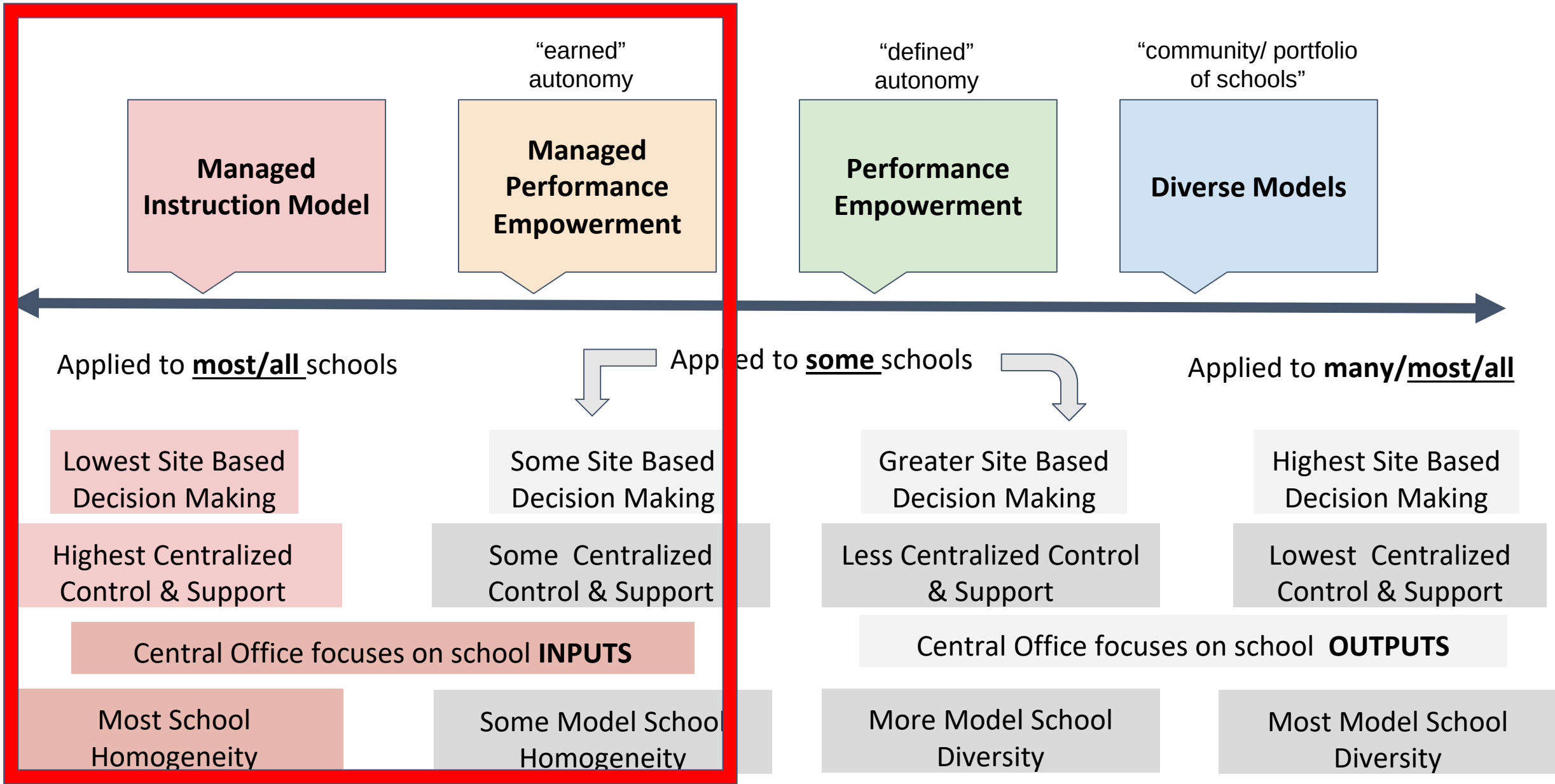
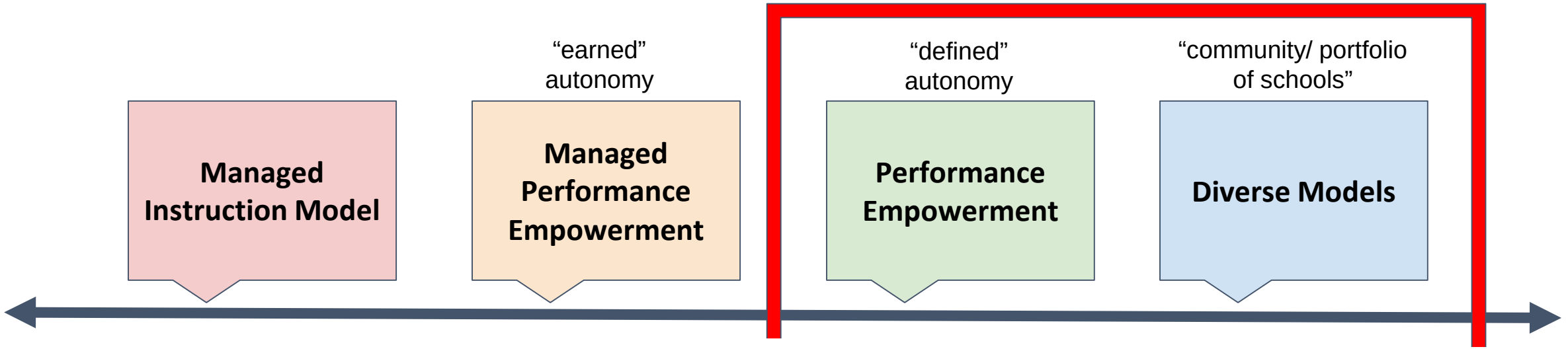
Consistent Systems, Structures, Labor Contracts and Practices

The systems, structures, CBAs/contracts, and practices of a district must support and be supported by its model, policies, and theory of action.

OUSD's Lived and Experienced Theory of Action



Our Design Team's Preferred Theory of Action and District Models



Applied to **most/all** schools

Applied to **some** schools

Applied to **most/all** schools

Lowest Site Based Decision Making	Some Site Based Decision Making	**Greater Site Based Decision Making**	**Highest Site Based Decision Making**
Highest Centralized Control & Support	Some Centralized Control & Support	**Less Centralized Control & Support**	**Lowest Centralized Control & Support**
Central Office focuses on school **INPUTS**		**Central Office focuses on school OUTPUTS**	
Most School Homogeneity	Some Model School Homogeneity	**More Model School Diversity**	**Most Model School Diversity**

Learning Journey Lesson #4: There is a lot to learn from districts that have adopted theories of actions, systems, and strategies designed to increase autonomy & accountability for district schools

Defined-Earned Autonomy Models (Chicago, OUSD 2016 Proposed)

Community of Schools (Denver)

District Managed w/Zone (Springfield)

Open Architecture (Lawrence)

Chicago Public Schools

DENVER PUBLIC SCHOOLS
Discover a World of Opportunity™

SEZP
SPRINGFIELD EMPOWERMENT ZONE PARTNERSHIP

LAWRENCE PUBLIC SCHOOLS

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

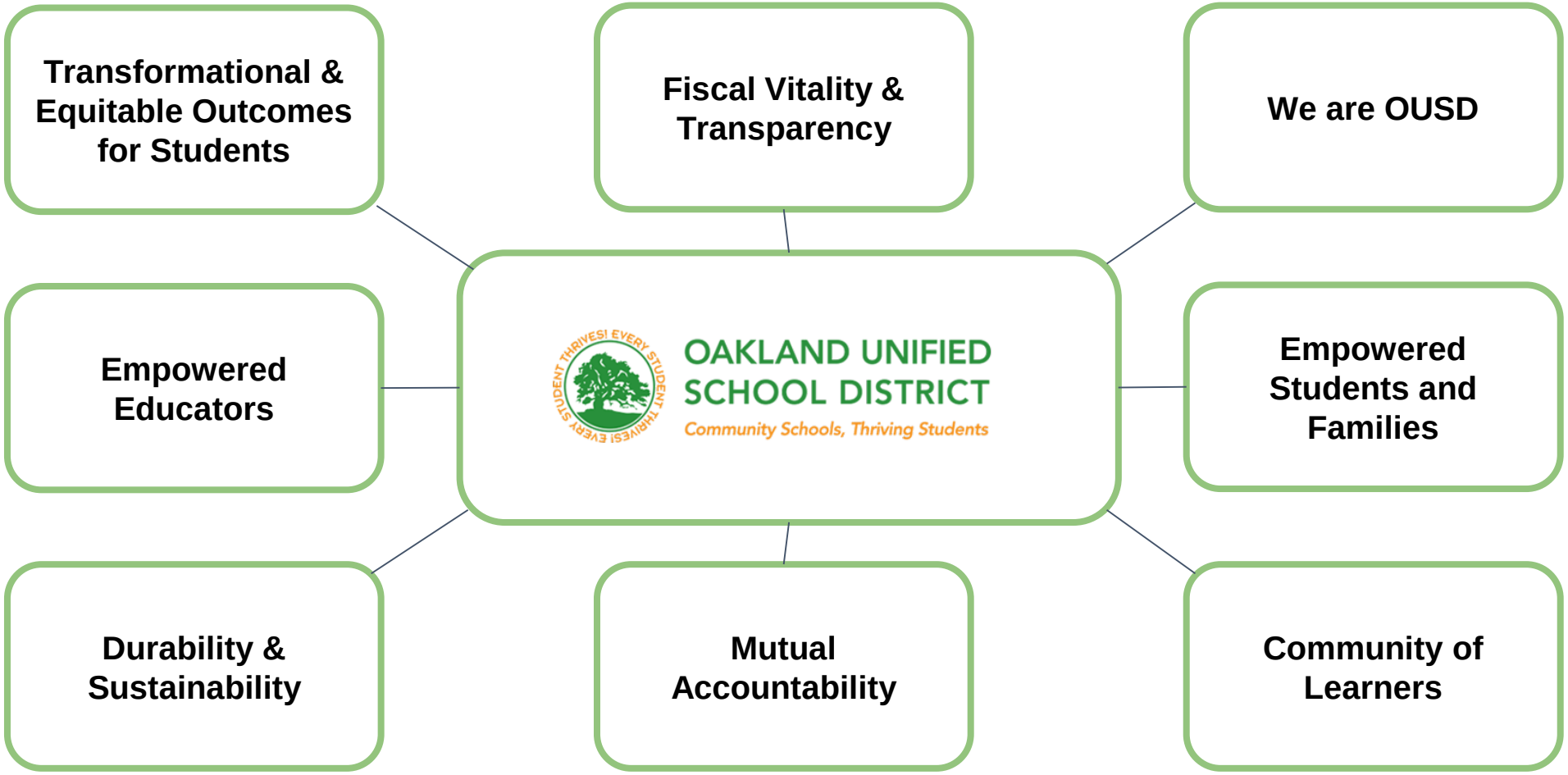
Autonomy & Accountability District Model Comparison

Autonomies for **some** schools, determined by central	Autonomies for **some** schools, opt in or by zone design	Autonomies for **all** schools
More variability in autonomies; may be less robust and/or durable		Less variability in autonomies; more robust and/or durable
Some Site-Based Accountability	Greater Site-Based Accountability	Highest Site-Based Accountability
Some Centralized Control & Inputs; Less Focus on Outputs	Less Centralized Control & Inputs; More Focus on Outputs	Least Centralized Control & Inputs; Most Focus on Outputs
Larger, more complex central office and departments		Smaller, more nimble central office and departments

Learning Journey Lesson #5: Autonomy & accountability models may hold promising solutions for Oakland's current pain points

Student Outcomes & School Quality	Schools & teachers can more nimbly respond to student need - leading to better outcomes and higher quality schools
Human Capital & Talent	School systems that empower educators attract more high-quality talent and better retain high-performing educators
Labor Collaboration	Structures elevate teacher voice and create a formal role for teacher-led decision-making; Teachers get to set school-level working conditions
Fiscal Vitality	Pushing more money to school-sites allows for more efficient and impact-oriented use of resources
Need for Central Office Redesign & Organizational Resilience	Central office shifts to be more customer service oriented and market driven - this becomes a more student-centered way to right-size central office
Empowering Educators and Families	Families & Educators have more formal role in decision-making and their satisfaction is part of accountability system
Right-Sizing & Designing our Community of Schools	*School sites will need significant autonomy to successfully re-envision and consolidate*

Learning Journey Lesson #6: We can use lessons learned to inform our design principles moving forward in order to support the critical redesign of the district...



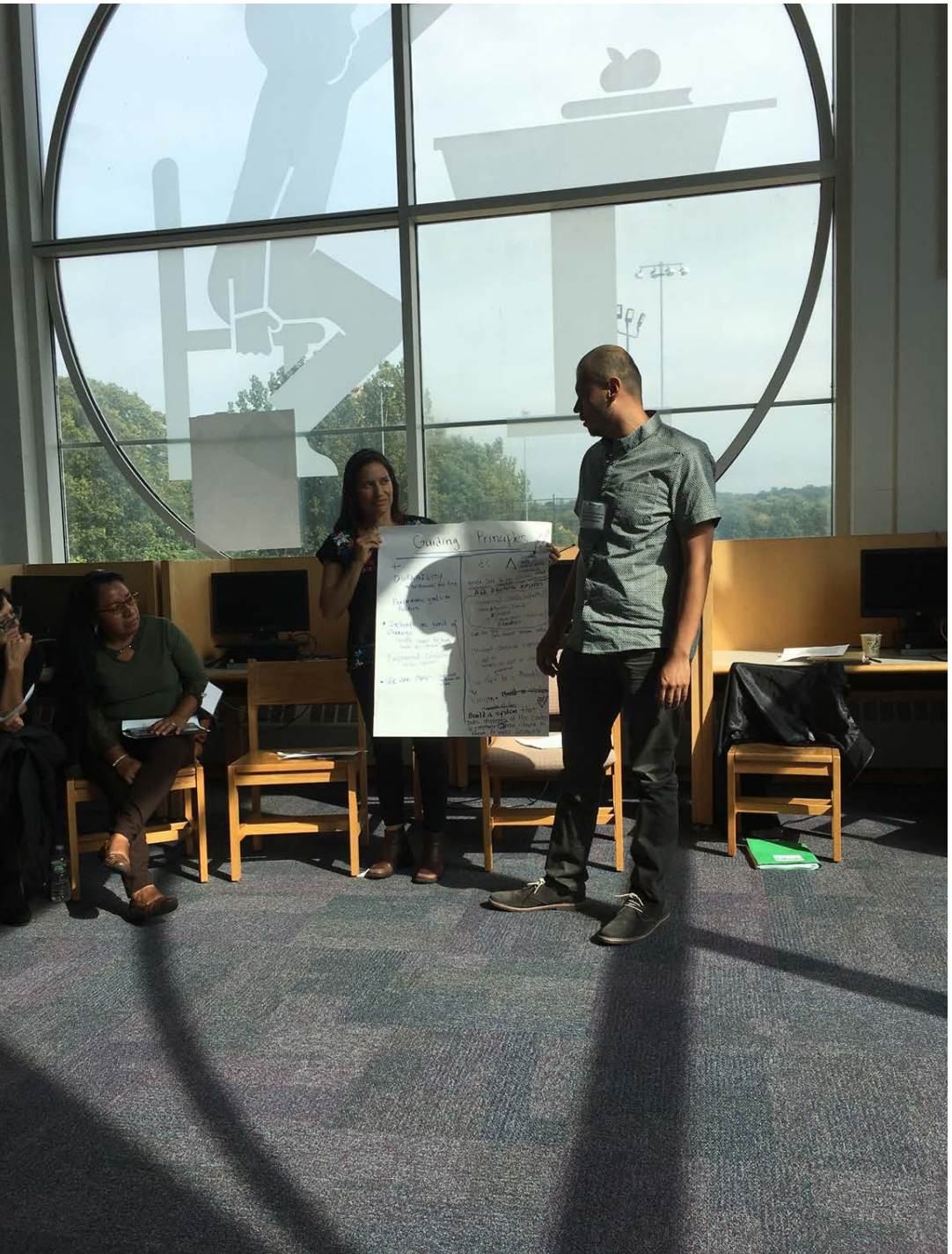
...we believe this work can result in <u>both</u> fiscal vitality and improved student outcomes!

Design Team Next Steps

- Engage community around district models we shared with you tonight & what makes the most sense for Oakland
- Understand the change management processes necessary to reach any one of these as an end-game
- More deeply understand the fiscal impact of each of these models
- Gain consensus around the design team's recommendations to the board and superintendent
- Codify our learnings, findings, and recommendations and share with the board and superintendent for consideration within the BP 6006 city-wide plan (or other work & priorities of the district)

We Need Your Feedback to Strengthen and Inform Our Work!

Questions	Suggestions
Warm Feedback	Cool Feedback



Thank you!