Personalized Learning in Oakland

January 31, 2014

Kyla Johnson-Trammell, Associate Superintendent of Leadership, Curriculum & Instruction, OUSD
Hae-Sin Thomas, CEO, Education for Change
David Montes de Oca, Associate Superintendent of Quality, Accountability & Analytics, OUSD
John Krull, Information Officer, Technology Services, OUSD
Greg Klein, Director of Blended Learning, Rogers Family Foundation
Oakland’s Proposal for Personalized Learning

Current State  Our Vision for PL  Our Proposal
Our organizations bring complimentary strengths

Dramatically Personalize Learning for all Oakland Students
## Who we are: Past to Present

### Kids need to be known

#### Oakland Public Schools

<table>
<thead>
<tr>
<th>OUSD</th>
<th>Oakland Charters</th>
<th>Community Partners</th>
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| **Small Schools Movement**  
created safer learning environments  
(2000-2007) | **From zero to 32 district authorized charter schools** | **• OTX West**  
**• Oakland Schools Foundation**  
**• Rogers Family Foundation** |
| **In-House Innovations**  
School Quality Review, Community Schools  
Strategic Site Plans | **Multiple National Blended Leaders** | |
| **Social Emotional Learning & Full-Service Community School District**  
(2011-present) | | |
| **Blended Learning**  
Rogers Family Foundation Pilot Schools  
District-level ELA adaptive software purchases | | |

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This slide outlines the history and initiatives of Oakland Public Schools. It highlights the Small Schools Movement, which created safer learning environments from 2000 to 2007. The chart also notes OUSD's in-house innovations, including school quality review, community schools, and strategic site plans. The chart details the Social Emotional Learning and Full-Service Community School District established in 2011. Blended learning is also covered, with a focus on Rogers Family Foundation pilot schools and district-level ELA adaptive software purchases. The Oakland Charters section mentions the growth from zero to 32 district authorized charter schools. Community partners include OTX West, Oakland Schools Foundation, and Rogers Family Foundation.
Oakland 1999: Saturated with low performing schools
Oakland 2012: 7 years of “Most Improved”

Oakland Schools: 2012 API

www.goleadershipcenter.org
Yet, Oakland students continue to face significant challenges

<table>
<thead>
<tr>
<th>Truancy</th>
<th>Disproportionality</th>
<th>HS Graduation</th>
<th>College Readiness</th>
<th>College Completion</th>
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<td>42% of Oakland students were Truant during the 2011-12 school year</td>
<td>Only 32% of African-American and 28% of Hispanic students in OUSD scored proficient or higher on third grade ELA</td>
<td>61% of Oakland students who entered 9th grade in 2008 graduated in 2012</td>
<td>52% of Oakland grads in 2011-2012 met A-G Requirements</td>
<td>Only 33% of students completing HS in ‘05-’06, also completed at least three consecutive terms at a post-secondary school</td>
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Our district, charter partners, and community are not satisfied. **We have a moral imperative to give our students the power to disrupt the cycle of inequity.**

Source: California Department of Education; Oakland Achieves, A Public Education Progress Report, Spring 2013
Oakland’s Proposal for Personalized Learning

Current State  Our Vision for PL  Our Proposal
PL Vision ignited by Blended Pilots

“The blended learning pilots were an ‘ahah!’ moment. They germinated ideas.”  
– Mark Triplett, Director of Middle Schools
Our stakeholders cite three opportunities for Personalized Learning in Oakland

**What are the biggest and most relevant opportunities that you see for Oakland in Personalized Learning?**

- **“The range we address here in Oakland is enormous. I see PL not just helping students who are behind, but improving quality for all by differentiating to the fullest.”**—Assoc. Supt. of Leadership, Curriculum and Instruction

- **“What we’ve seen is two things - technology speeds up the process of getting data. And if we can use it to address basic skills, it frees up the teacher to plan for richer experiences.”**—Principal, Elementary School

- **“College requires you to manage your own learning, but our schools have not taught kids these habits of mind. If you build this explicitly into PL, you will help students grow their agency”**—CEO, EFC

Source: Stakeholder Interviews
Putting it all together

Oakland is Dreaming Bigger, Better & Smarter

- From BL to PL
- Model district-charter collaboration
- Personalize adult learning to excite teachers about their own growth
Our vision of Personalized Learning

Students college, career, and community ready

<table>
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<tr>
<th>Social Emotional Learning</th>
<th>Learner Profiles</th>
<th>Competency-Based Progression</th>
<th>Personalized Learning Paths</th>
<th>Flexible Learning Environment</th>
<th>Contextualized Learning</th>
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<td>Explicit building of strong relationships with teachers and peers in a supportive school climate</td>
<td>Use of “learner profiles” that are informed by and accessible to students, teachers, parents and district-wide stakeholders</td>
<td>Differentiated instruction that grounds progression in competency rather than in only time, and meets each student in his/her ZPD</td>
<td>Personalized learning paths informed by students and teachers that enable student agency and ownership of their learning</td>
<td>A flexible learning environment that offers multiple learning modalities, and extends learning beyond schools</td>
<td>Learning that helps students connect academic knowledge with real-world applications, building collaboration, communication, critical thinking and creativity</td>
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Empowering students to own their learning.
The work we seek to do centers around true college readiness, as measured by students’ performance on the EAP, A-G completion, PSATs and SATs

Oakland Unified Graduate Profile

Our graduates are college, career, and community ready!

Oakland Unified’s College Readiness Metrics

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Source: Oakland Unified School District
Our proposed metrics for Phase III / school implementation include learning growth, college-readiness and student agency metrics that exemplify personalization.

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Oakland’s Proposal for Personalized Learning

Current State | Our Vision for PL | Our Proposal
A rigorous development & selection process to create quality schools

- **Jan 2014**
- **Mar-Apr 2014**
- **May 2014**
- **May 2014-Mar 2015**
- **Apr-Aug 2015**

**Inform** > **Discover** > **Apply** > **Design** > **Launch**

| Est. Number of Schools | ~130 schools (70% district, 30% charters) | ~50 schools | ~20 schools | ~6-8 schools | ~3-5 schools |
Importance of the “Discover” Phase: Why, What & How

WHY: Only 12 Oakland Schools applied to Cohort II of the BLP

WHAT: BL, PL, & Grant Process logistics, including Selection Criteria

HOW: In-person seminars and self-study curriculum

Selection Criteria for the Design Cohort:
- Pedagogical interest in PL’s potential to improve learning for students
- Capacity & commitment of staff and time for design process
- Principal must have 2+ years experience and commit to staying at site for next 3 years
- School must have >40% FRL population to be eligible for Gates Foundation funds
Our Design Year will help schools dream bigger

**Supports for School Design Teams**

1. **Planning Grant** - Up to $25K to support school site’s process
2. “Personalized Learning 101”
3. School Visits
4. Design Thinking
5. Practitioner-to-Practitioner Collaboration

| Charter-district grouping & consultancy protocols | Collaboration time between schools and district personnel | Flexible agenda of topics driven by exit tickets |

6. **Gates School Design Institute (Content**
7. **National Practitioners**

**Expectations for Teams**

- A budget proposal
- Small pilots of PL strategies (with and without technology)
- Quarterly stakeholder input gathering sessions
- Attend the gatherings outlined to the left (minimum 25 hr/yr)
- Deliverables according to selection criteria for Phase III
### Designing with clear school autonomies

#### Budget
- Through Results-Based Budgeting, schools already have full autonomy over financial resources (outside of teacher salary levels in the OEA contract)

#### Curriculum
- District moving out of scripted curriculum toward more “loose” around content and “tight” around curricular practices (e.g., planning habits)
- Schools may replace district-adopted curriculum with those that they choose. Must stay compliant to Williams by having adopted texts on hand

#### Assessment
- Schools may choose their own assessments as long as they continue to administer state tests, and three tests important to the district's public accountability (SRI, SBAC aligned benchmarks, and math and writing performance tasks)

#### PD
- Schools have autonomy to use their contract PD and planning days, and their contract weekly PD times, as needed to support their instructional model

#### Schedule
- Schools may modify their schedule as needed to support the instructional model, including changes to the in-day and schoolyear schedule, within the bounds of relevant contract provisions*

#### Data Infrastructure
- Schools may supplement OUSD-supported data software (AERIES and EduSoft)

#### Staffing
- For specific staffing changes that are critical to their plans (e.g. use students as interns, create technology-focused Instructional Assistant positions), schools may obtain waivers from the OEA contract through a 2/3 vote of their teachers and approval by the OEA Board

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**We are committed to helping selected schools navigate the autonomies they need in order to dramatically improve**

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Note: The OEA Contract stipulates minimum annual instructional minutes, a workyear of 180 instructional days, and workdays of continuous blocks of 6.75-7 hours, starting not before 8am and concluding not later than 3:45pm (OEA Contract, Article 10 – Hours of Work)
Support driven by site design and needs


How will Instructional and Assessment practices evolve?

- Diagnose and provide differentiated paths for teachers
- “Inquiry Cohort” structure, including monthly cohort meetings and coach visits to sites
- Instructional Rounds
- On site, cohort, and cross-system teacher collaboration

How will the school model continue to iterate and improve?

- Leverage Community Schools site plan (C3SP) & Charter Authorization
- Use the Charter Renewal, SQR and Balanced Scorecard to diagnose issues to inform Personalized Learning plans
- Cohort Interim Reporting and Stakeholder Surveys
**Site Implementations require Systems-Level change**

### Program Governance

**Steering Committee**

- **Kyla Johnson-Trammell**
  Assoc. Supt. of Leadership, Curriculum & Instruction (10%)
- **David Montes de Oca**
  Assoc. Supt. of Quality, Accountability & Analytics (5%)
- **Hae-Sin Thomas**
  CEO, Education for Change (10%)
- **Rhonnel Sotelo**
  Chief Strategy Officer, Rogers Family Foundation (10%)

### Schools

- School 1
- School 2
- School 3
- School 4
- School 5
- School 6
- School 7
- School 8
- School 9
- School 10

**Program Coordinators** (Phase II)

- **OUSD ~1.0 FTE**
  - IT Manager, 33%
  - LCI Specialist, 33%
  - QAA Specialist, 33%
- **CMOs ~0.4 FTE**
  - 2 CMO Directors of PL (from EFC + other CMOs in design process), at 20% each
- **RFF 0.75 FTE**
  - **Greg Klein**, Blended Learning Director, Rogers Family Foundation (75%)

- **Grant funded**

  - Provides blocking and tackling support at higher levels when needed
  - Holds the Program Coordinators accountable
  - Own and drive the work of Phase II and III in Oakland, from initial launch of program to continuous improvement of program
  - Provides direct supports to schools and connects schools with other internal and external parties when appropriate

*Note: The program coordinator supports outlined here are for Phase II only. In Phase III when schools have been selected for implementation, the involvement of OUSD managers as well as CMO Directors would scale down as there would be fewer schools. OUSD coordinators will scale down to two individuals at 0.2 FTE each, and CMO directors will scale down to approximately 0.15 FTE for each school selected for implementation.*
For the 95% of Oakland principals and teachers not in the selected schools

Cultivate Oakland Principals

- ‘Discover’ process (twice annually), guided by OUSD & Charter Leadership
- Standing agenda item at Principal PD with RExOs / Charter Leaders (monthly)
- All-Admin Retreat (2-3 days at start of year)

Cultivate Oakland Teachers

- Do / “Muck About”
  - Transform
  - Aware

- Personalized Learning Schools Expo (annual)
- OUSD-organized Ed-Tech meet-up (every 6 weeks for all teachers)
- Oakland Teacher Conference (every spring)

Coordination with outside organizations to create accessible no-risk opportunities to design innovation and to learn from the ideas germinating throughout Oakland.
Budgets and Resource Allocation: Phase II

The total cost for Phase II will be $510K, with approximately $116K supported by the Rogers Family Foundation and $394K from Gates.
Why support Oakland to continue the PL work?

Oakland is Dreaming Bigger, Better & Smarter

The right team

The right PL philosophy and experience

The right time
Questions

Dramatically Personalize Learning for all Oakland Students
BACK-UP
The Oakland SDT interviewed and surveyed many stakeholders in order to develop this plan.

**Primary Team:**
- Tracey Logan, Project Manager – Technology Services
- Leah Jensen, Instructional Technology
- Lars Jorgensen, Assessment Tools Manager
- John Krull, Information and Technology Officer
- Gary Yee, Superintendent
- Maria Santos, Deputy Superintendent of Instruction and Equity in Action
- Vernon Hal, Deputy Superintendent of Business and Operations
- David Montes, Associate Superintendent of Quality, Analytics and Accountability
- Silke Bradford, Director of Quality Diverse Providers
- Curtiss Sarikey, Associate Superintendent of Family, School and Community Partnerships
- Kyla Johnson-Trammel, Associate Superintendent of Leadership Curriculum and Instruction

**Additional Interviews:**
- Sara Stone, Principal, Redwood Heights Elementary
- Helene Moore, Digital Media Teacher, Joaquin Miller Elementary
- Avi Zellman, Math Teacher, Madison Middle
- Moyra Contreras, Principal, Melrose Leadership Academy (x2)
- Young Whan Choi, LCI
- Mark Triplett, Director of Middle School (x4)
- Juan Du, QAA

**Teacher & Site Leader Survey**
- Teachers (n=64) & Site Leaders (n=19)

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**Primary Team:**
- Greg Klein, Director of Blended Learning
- Rhonnel Sotelo, Chief Strategy Officer

**Primary Team:**
- Sundar Chari, Director of Technology and Innovation
- Hae-Sin Thomas, Chief Executive Officer

**Additional Interviews:**
- Michael Hatcher, Future Principal, EPIC
- Leo Fuchs, Principal, Learning without Limits
- Larissa Adams, Principal, Ascend Elementary

**Teacher & Site Leader Survey**
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**Community Partners**

**Additional Interviews**
- Bruce Buckelew, OTX West
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Oakland Unified Graduate Profile

Our graduates are college, career, and community ready!

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Oakland Unified has made significant strides in innovative practices

- Community Partners, OUSD and Charters have joined to support a second set of Blended Learning Pilot schools
- OUSD has committed to purchasing 7,000 Chromebooks for SBAC testing and for teaching and learning
- Learning from charters and other districts, OUSD has built five high-quality processes to elevate its schools in continuous improvement through community engagement, measurement, transparency and action

**Tools to help schools plan, monitor and iterate**

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<td>From a compliance process to a an inspirational visioning document</td>
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<td>School Quality Review (“SQR”) &amp; Balanced Scorecard</td>
<td>Learning the best from the charter authorization process and applying it in a district-wide non-punitive process that is in service of schools’ plans</td>
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<td>School Quality Improvement System (CORE-Waiver)</td>
<td>From an accountability system with harsh fiscal penalties to one that rewards improving academic and social-emotional supports</td>
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**Processes to help schools improve instruction**

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<td>From rote professional development to contextualized adult learning that leverages collaboration</td>
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<td>Inquiry Cohorts</td>
<td>From scripted instruction to a district-wide effort to strengthen teachers’ content knowledge in order to improve instruction</td>
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We are committed to evolving each process according to new learnings from our schools and community partners
## Personalized Learning Vision

Articulating what Personalized Learning *is* and *is not* in Oakland illustrates our vision more crisply

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<th>What Personalized Learning is NOT . . .</th>
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<td>• Opening up opportunities for collaborative learning and social emotional growth</td>
<td>• Solo learning in front of a computer</td>
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<td>• Amplifying and enabling best practices that teachers already know work</td>
<td>• Technology replacing teachers (it cannot!)</td>
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<td>• Remediating <em>and</em> accelerating the strengths and gaps that every student brings</td>
<td>• Only a remediation tool</td>
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<td>• Multiple paths for learning a skill, with multiple opportunities to demonstrate mastery</td>
<td>• “Drill and kill” instruction that remediates by accelerating the same learning path</td>
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<td>• Contextualized learning with real world problems worth solving</td>
<td>• Learning solely through abstract academic settings</td>
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<tr>
<td>• A modern experience that builds critical thinking, communications, collaboration, and creativity</td>
<td>• Only “working on devices”</td>
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• **Getting out ahead**

• **A cautionary tale**
School Selection Process
Guiding principles for Oakland school selection process

• **The process will be competitive** - Schools will need to demonstrate bold, innovative school plans in order to be selected

• **We will invite a diverse set of schools that mirror Oakland’s overall mix** – We will open the process to all OUSD schools and charter schools in Oakland, and aim to select a portfolio that would be representative of the Oakland mix

• **“Hunger for change” is as important as previous capacity for change** – Rather than set many top-down filters on “readiness” that would close the process to some schools, we will transparently announce the demands of the work upfront so that schools can gauge their own readiness

• **District-level change begins now** – The process will stimulate change among all OUSD district departments serving schools, building capacity and alignment to accelerate school transformations going forward
School Selection Process

The Design Year will leverage lessons learned from the Blended Learning Pilots

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<th>What We Learned</th>
<th>How We’ll Adjust</th>
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<td>• <strong>Design Thinking</strong> - “The Design Thinking piece was powerful but quick. It was just a few hours. The whole process of empathizing was us sitting in the room imagining what our kids would experience.”</td>
<td>• More time and coaching around Design Thinking</td>
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<td>• <strong>Touchpoints &amp; Structure</strong> - “We need more touchpoints that are not measured or evaluated, like consultancies. Also, you should require school visits rather than leaving it up to teams”</td>
<td>• More touchpoints and common activities</td>
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<tr>
<td>• <strong>Practitioner to Practitioner Collaboration</strong> - “Even though it’s competitive, have schools share and collaborate. Have more opportunities for interaction among teams, but facilitate it so it feels productive.”</td>
<td>• A structure and incentives for schools to collaborate</td>
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<td>• <strong>Integrate with District Environment</strong> - “I wish we spent more time thinking about what blended model would be best for our instructional practice and what the district is doing. For example, how does STMath fit with math instruction going to problem-based?”</td>
<td>• Bring in district managers regularly to interface with schools and collaboratively problem-solve</td>
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<td>• <strong>Deep Knowledge of Curriculum</strong> – “We had a session to explore online learning software, but there were too many providers to really sit and think. That also led us to choose too many providers. The key is not breadth but depth.”</td>
<td>• More time to get to know and select curriculum</td>
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The selection criteria will be provided upfront so that all schools understand expectations

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<tr>
<th>Selection Criteria</th>
<th>School Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Pedagogical interest in PL's potential to improve learning for students</td>
<td></td>
</tr>
<tr>
<td>• Capacity &amp; commitment of staff and time for design process</td>
<td></td>
</tr>
<tr>
<td>• Principal must have 2+ years experience and commit to staying at site for next 3 years</td>
<td></td>
</tr>
<tr>
<td>• School must have &gt;40% FRL population to be eligible for Gates Foundation funds</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Method to Assess the Criteria</th>
<th>School Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Application for Design</td>
<td></td>
</tr>
<tr>
<td>• RxO/ExO or CMO recommendation</td>
<td></td>
</tr>
<tr>
<td>• Connects rationale for implementing PL to school’s mission, goals and student achievement outcomes</td>
<td></td>
</tr>
<tr>
<td>• Has a bold model of learning that embodies design principles and can achieve 1.5 years annual learning growth</td>
<td></td>
</tr>
<tr>
<td>• Demonstrates broad buy-in from faculty and parents</td>
<td></td>
</tr>
<tr>
<td>• Outlines financially sustainable model on the public dollar within 4 years</td>
<td></td>
</tr>
<tr>
<td>• Describes rigorous process to select instructional content</td>
<td></td>
</tr>
<tr>
<td>• Comprehensive PD plan for teachers and teacher leaders, mapped to school calendar, and touches on the following areas:</td>
<td></td>
</tr>
<tr>
<td>• Data analysis &amp; differentiated instruction, Classroom management, Content, Facility with online instructional tools (as appropriate)</td>
<td></td>
</tr>
<tr>
<td>• Identifies all “steps to launch” and maintenance needs including personnel responsible and deadlines</td>
<td></td>
</tr>
<tr>
<td>• Has clear plan to grow the PL implementation in years 2-4</td>
<td></td>
</tr>
<tr>
<td>• Final presentation to Oakland Selection Committee, including:</td>
<td></td>
</tr>
<tr>
<td>• OUSD senior representatives from LCI and QAA departments</td>
<td></td>
</tr>
<tr>
<td>• OUSD RxOs and ExO</td>
<td></td>
</tr>
<tr>
<td>• CMO leaders</td>
<td></td>
</tr>
<tr>
<td>• Rogers Family Foundation</td>
<td></td>
</tr>
<tr>
<td>• National experts in Personalized Learning</td>
<td></td>
</tr>
</tbody>
</table>

Source: Rogers-OUUSD Blended Learning Pilots, Stakeholder Interviews
### Budgets and Resource Allocation: Phase II

#### “Phase II” Resource allocation assumptions

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>School “Discover” Activities</strong></td>
<td>Information Sessions</td>
<td>• 2 in person seminars, $500 ancillary costs (snacks, printing) each, $500 stipend per school in attendance (~50 schools) funded by Rogers Family Foundation</td>
</tr>
<tr>
<td></td>
<td>Self-Study Program</td>
<td>• 5 hour self-study program undertaken by sites, free content, $500 stipend per school, (~30 schools) funded by Rogers Family Foundation</td>
</tr>
<tr>
<td><strong>School Design Activities</strong></td>
<td>Local School Visits</td>
<td>• 3 school visits, $350 ancillary costs (meals, materials) each Per school: $50 for travel per visit</td>
</tr>
<tr>
<td></td>
<td>Monthly Cohort-Wide Gatherings</td>
<td>• 12 half-day working sessions, $350 ancillary costs (food, printing) each Per school: $30 for travel per gathering</td>
</tr>
<tr>
<td></td>
<td>School Planning Grants</td>
<td>• Up to $25,000 based on school-proposed budgets to support substantial time of planning team, purchases of materials for pilots, stakeholder engagement efforts, etc.</td>
</tr>
<tr>
<td><strong>TA Providers</strong></td>
<td>Design Thinking Consultants (e.g., Stanford d School, IDEO, etc.)</td>
<td>• ~$60,000 cost for TA provider to work with all participating schools at ~$10,000 per school</td>
</tr>
<tr>
<td><strong>System-Level Supports</strong></td>
<td>Personnel Time – IT Manager, OUSD</td>
<td>• 33% Allocation, at $34,650 (salary and benefits) to work 50% with schools and 50% to build system capacity</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – LCI Specialist, OUSD</td>
<td>• 33% Allocation, at $34,650 (salary and benefits) to work 50% with schools and 50% to build system capacity</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – QAA Specialist, OUSD</td>
<td>• 33% Allocation, at $34,650 (salary and benefits) to work 50% with schools and 50% to build system capacity</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – Director of Personalized Learning, CMOs</td>
<td>• 2 CMOs represented at 20% Allocation each, at $25,000 (salary and benefits) each</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – Director of Blended Learning, RFF &amp; Support</td>
<td>• 75% Allocation of Director &amp; Support, at $115K (salary and benefits) funded by Rogers Family Foundation</td>
</tr>
<tr>
<td><strong>Additional Ancillary costs</strong></td>
<td></td>
<td>• $5000 for miscellaneous expenses (lunches, travel for interviews, etc.)</td>
</tr>
<tr>
<td><strong>Oakland Schools Foundation Indirect Costs</strong></td>
<td></td>
<td>• 5.0% of total BMGF-Funded supports</td>
</tr>
</tbody>
</table>
Altogether, Phase II is expected to cost $396K, which falls within the Phase II grant guidance of $100K for each of 6 schools ($600K total)

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Phase II Estimated Costs</th>
<th>City/ System</th>
<th>Funding Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>School “Discover” Activities</td>
<td>Information Sessions</td>
<td>$26,000</td>
<td>School</td>
<td>RFF</td>
</tr>
<tr>
<td></td>
<td>Self-Study Program</td>
<td>$15,000</td>
<td>School</td>
<td>RFF</td>
</tr>
<tr>
<td>School Design Activities</td>
<td>Local School Visits</td>
<td>$1,950</td>
<td>School</td>
<td>To be Raised</td>
</tr>
<tr>
<td></td>
<td>Monthly Cohort-Wide Gatherings</td>
<td>$6,360</td>
<td>School</td>
<td>To be Raised</td>
</tr>
<tr>
<td></td>
<td>School Planning Grants</td>
<td>$150,000</td>
<td>School</td>
<td>To be Raised</td>
</tr>
<tr>
<td>TA Providers</td>
<td>Design Thinking Consultants (e.g., Stanford d School, IDEO, etc.)</td>
<td>$60,000</td>
<td>School</td>
<td>To be Raised</td>
</tr>
<tr>
<td>System-Level Supports</td>
<td>Personnel Time – IT Manager, OUSD</td>
<td>$34,000</td>
<td>50% System 50% School</td>
<td>To be Raised</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – LCI Specialist, OUSD</td>
<td>$34,000</td>
<td>50% System 50% School</td>
<td>To be Raised</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – QAA Specialist, OUSD</td>
<td>$34,000</td>
<td>50% System 50% School</td>
<td>To be Raised</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – Director of Personalized Learning, CMOs</td>
<td>$50,000</td>
<td>50% System 50% School</td>
<td>To be Raised</td>
</tr>
<tr>
<td></td>
<td>Personnel Time – Director of Blended Learning, RFF</td>
<td>$115,000</td>
<td>School</td>
<td>RFF</td>
</tr>
<tr>
<td></td>
<td>Additional Ancillary costs</td>
<td>$5,000</td>
<td>System</td>
<td>To be Raised</td>
</tr>
<tr>
<td></td>
<td>Oakland Schools Foundation Indirect Costs</td>
<td>$18,863</td>
<td>System</td>
<td>To be Raised</td>
</tr>
</tbody>
</table>

**Final budget to be approved by Oakland SDT leadership before submitting to Gates**
### Budgets and Resource Allocation: Phase III

Phase III “Launch and Implementation” costs for one school

#### Model Assumptions

<table>
<thead>
<tr>
<th>Cost</th>
<th>Year Cost Incurred</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Limit</td>
<td>Upper Limit</td>
<td>Year 1</td>
</tr>
</tbody>
</table>

#### HARDWARE

**Infrastructure Upgrades**
- **Bandwidth Upgrade (line in + main router/switch)**: $7,000 - $9,000 per School
- **Wireless Upgrade**: $500 - $600 per Classroom
- **Classroom Furniture**: $521 - $620 per Classroom
- **Laptop Carts**: $42 - $58 per Laptop

**Devices**
- **Student Computers purchase**: $300 - $400 per Laptop
- **Teacher Computers purchase**: $825 - $1,100 per Teacher
- **Student Computer replacement due to theft**: $15 - $20 per Laptop
- **Teacher Computer replacement due to theft**: $41 - $55 per Teacher

**Other Hardware**
- **Accessories (e.g. headphones)**: $8 - $15 per Laptop
- **Accessories replacement due to theft**: $0.4 - $0.8 per Laptop

#### SOFTWARE

**Digital Learning Content**
- **Software License**: $90 - $160 per Student

**LMS / Learner Profile Software**
- **Integration & Professional Development**: $2,000 - $2,800 Per School
- **Annual License**: $20 - $40 Per Student

#### PROFESSIONAL DEVELOPMENT

**Summer Training/PD for onboarding school**
- $300 - $300 per Teacher

**Summer Training/PD for onboarding teachers**
- $300 - $300 per Teacher

**School Year Training/PD**
- $206 - $206 per Teacher

**Coach - Stub Year**
- $137 - $137 per Teacher

**Coaching**
- $1,643 - $1,643 per Teacher

#### OTHER SUPPORT

- **Design Consultation fees**: $0 - $75 per Student

---

**Notes**

- “Infrastructure” includes wireless network upgrades, power and wiring upgrades, laptop carts, and furniture. “Devices” includes student and teacher computer purchases, data usage, and repair/replacement cost for accessories and furniture.
- Source: Oakland USD Blended Pilots; Project RED; Dell Case Study: KIPP Empower; Dell Case Study: Alliance BLAST School; Interviews; Parthenon Analysis
- **Model Assumptions**
  - Assume $300 of labor per classroom + ~200-$300 per equipment
  - Assumes 6 year lifecycle for furniture
  - Assumes a 4 year lifecycle
  - Assumes 2 year lifecycle
  - Assumes 5% stolen annually
  - To cover all subjects; Includes ~$15 to configure accounts & Cost of PD
  - Based on cost of Illuminate at a pilot school
  - Based on 2x the cost of Illuminate at a pilot school
  - One day of PD before initial roll out with all teachers
  - One day of PD for teachers the summer before they are slated to rollout personalized learning in classroom.
  - Additional 1 hour a month for planning/collaboration on top of existing contract and department meeting time
  - 1/12 of a year of a coach to lead training during summer
  - 1 Coach for 3 Schools; Assuming on average 14 teachers per school & $69K Salary
Budgets and Resource Allocation: Phase III
For a 420 student school with a phased rollout, there is a total of ~$470K of upfront and phase-in costs, and ~$112K annually once at scale

School Assumptions:
- 420 students
- 30 students/classroom
- 1 teacher/classroom
- 3:1 student: laptop ratio
  - Plus two extra laptops per classroom
- Assume school purchases new laptops
- Assume that ~47% of laptops, accessories & wireless will be supported by existing district funds (calculated from SBAC technology plans)
- Assume that 30% of necessary broadband upgrade costs will be covered by district or existing funds

Annual Cost of Personalized Learning for a Phased Implementation,
Total School Cost Estimates
Excluding Costs Covered by District Chromebook Rollout

Note: “Infrastructure” includes wireless network upgrades, power and wiring upgrades, laptop carts, and furniture. “Devices” includes student and teacher computer purchases, data usage, and repair/replacement cost for accessories; Other Support includes MAP Assessments, Aide Support; Design Consultation

<table>
<thead>
<tr>
<th>Range of Annual Cost per School</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>$31K</td>
<td>$94K</td>
<td>$111K</td>
</tr>
<tr>
<td>High</td>
<td>$70K</td>
<td>$122K</td>
<td>$149K</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$107K</td>
<td>$150K</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$88K</td>
<td>$128K</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$87K</td>
<td>$129K</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$91K</td>
<td>$133K</td>
</tr>
</tbody>
</table>

- **Low**
  - Year 1: ~$50K
  - Year 2: ~$108K
  - Year 3: ~$130K
  - Year 4: ~$108K
  - Year 5: ~$112K
  - Long Term Steady State: ~$112K

- **Medium**
  - Year 1: ~$108K
  - Year 2: ~$130K
  - Year 3: ~$128K
  - Year 4: ~$108K
  - Year 5: ~$112K
  - Long Term Steady State: ~$112K

- **High**
  - Year 1: ~$150K
  - Year 2: ~$150K
  - Year 3: ~$149K
  - Year 4: ~$150K
  - Year 5: ~$149K
  - Long Term Steady State: ~$149K

Note: "Infrastructure" includes wireless network upgrades, power and wiring upgrades, laptop carts, and furniture. “Devices” includes student and teacher computer purchases, data usage, and repair/replacement cost for accessories; Other Support includes MAP Assessments, Aide Support; Design Consultation.
# Budgets and Resource Allocation: Phase III

## Phase III “Launch and Implementation” Programmatic Supports

### Model Assumptions

<table>
<thead>
<tr>
<th>Overall Cost</th>
<th>Cost Per School</th>
<th>Year Cost Incurred</th>
<th>Long Term Steady</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Programmatic Supports</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>OUSD</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel Time – IT Manager, OUSD</td>
<td>$21,600</td>
<td>$7,200</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Personnel Time – QAA Specialist, OUSD</td>
<td>$21,600</td>
<td>$7,200</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>CMOs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel Time – Director of Personalized Learning, CMO</td>
<td>$18,750</td>
<td>$6,250</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>RFF</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel Time – Director of Blended Learning, RFF</td>
<td>Covered by RFF</td>
<td>Covered by RFF</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>Programmatic Supports</strong></td>
<td>$61,950</td>
<td>$20,650</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: Oakland USD Blended Pilots; Project RED; Dell Case Study: KIPP Empower; Dell Case Study: Alliance BLAST School; Interviews; Parthenon Analysis
Financial sustainability for schools will be made possible through significant one-time funds and an increase in school funding and flexibility

**Short Term:** OUSD has earmarked $22M of one-time funds to support important infrastructural needs

- Over the next few years, OUSD is investing **$10M of Measure J** and **$12M of e-rate funds** to upgrade district and school-level technology infrastructure
- With “big ticket” infrastructure items covered, future PL costs will be predominantly school and classroom design, professional development, curriculum and materials, which are scalable and will integrate well with current costs

**Medium Term:** California’s new Local Control Funding Formula (“LCFF”) will increase funding to Oakland schools

- Ramping up with full implementation in Fall 2015, LCFF will provide Oakland **an additional $163M per year** which can be spent according to local needs
- Schools should have more in their budgets to cover other significant ongoing costs such as devices

**Long Term:** Oakland will leverage and improve school autonomies to improve financial sustainability

- Recognizing that staffing autonomies may be important for financial sustainability in the long run, we have begun to engage with the OEA about the personalized learning work to collaborate and build support for the work.

Note: Calculation of LCFF changes excludes funding for 100 Black Men of the Bay Area Community, ASCEND, Aspire Golden State College Preparatory Academy, Lazear Charter Academy, Learning Without Limits, & Urban Montessori Charter because data unavailable
Source: California Department of Finance
Critical Barriers

In the current state assessment, three areas emerged as critical barriers that Oakland plans to address now.

Critical Barriers – Current Readiness and Ease of Modification

A detailed assessment of each barrier is presented on the following slides.

Source: Parthenon Interviews
## Critical Barriers: Mitigation Strategy

### Critical Barrier #1 – Infrastructure

<table>
<thead>
<tr>
<th>Infrastructure Barrier</th>
<th>Plan to Address</th>
<th>By When?</th>
<th>Owner</th>
</tr>
</thead>
</table>
| **Issue #1 - Internet Access:** | • **Bandwidth:** OUSD is in process of upgrading bandwidth for elementary schools to at least 100Mbps, middle schools and small high schools to at least 250Mbps and large high schools to at least 500Mbps  
  • **Wireless Internet:** Using $12M of e-rate funds and $10M of Measure J funds, OUSD will upgrade wireless capabilities for over 50% of schools  
  • **Bandwidth:** OUSD Technology Plan 2014-18 commits to upgrading all schools the bandwidth needed for personalized learning according to SETDA recommendations | Jan. ’14  
May ’15  
May ’15 | OUSD Information Technology Officer (ITO) |
| **Issue #2 - Devices** | • **Devices & Wireless:** OUSD has already committed to purchase ~8,000 Chromebooks for schools, which will also have mobile access points  
  • Additionally, 3 high schools are getting donated netbooks at a 1 to 1 student-to-computer ratio | Mar. ’14  
Dec ‘13 | OUSD ITO |
| **Issue #3 – Tech Support** | • **Instructional vision for IT:** New IT leadership has increased department's focus on supporting instructional tech rather than only business operations. IT leadership committed significant resources and time to create personalized learning strategic plan.  
  • **Supporting tech-rich learning environments:** IT is two years into collaborating with RFF Blended Pilots, which has led to institutional knowledge around how to support schools with tech-rich environments. For example, district will purchase 10% extra Chromebooks so that broken ones can be quickly switched out, to not disrupt classroom  
  • **Modernizing hardware:** District hardware purchases transitioning to those that can be controlled and supported remotely to reduce the need for site-based IT support  
  • **Improving Site-Based IT Support:** OUSD will improve PD around technology to teachers; Another initiative is to provide older students opportunity to act as assistants for tier 1 needs in classes with younger students | Spring ‘14 | OUSD ITO |
| **Issue #4 – Data Accessibility** | • **Data Warehouse:** OUSD will develop a data warehouse that integrates all the districts’ data sources; this will ensure that major data pieces are collected and that they can be integrated into a single cohesive profile that can travel with the student between schools and classes | Spring ‘14 | OUSD ITO |
## Critical Barriers: Mitigation Strategy

### Critical Barrier #2 – Personnel Policy

<table>
<thead>
<tr>
<th>Personnel Policy Barrier</th>
<th>Plan to Address</th>
<th>By When?</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Issue #1 - The OEA is a strong union with considerable political influence locally. The OEA contract restricts class size. Teachers are assigned to schools based on seniority</strong></td>
<td>• <strong>Site Waiver</strong>: Per OEA/OUSD contract a site may request a waiver regarding any part of the contract, and it can be approved, as long as both parties agree to the waiver language. As needed, site design teams will be briefed on contract waiver language and process, to maximize potential flexibilities. Waiver requests must include:</td>
<td>On going</td>
<td>Assoc Supt of Instruction (LCI)</td>
</tr>
<tr>
<td></td>
<td>• The specific language sought to be waived</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The degree to which staff were involved in the development of the proposal</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Explanation for how the interests which are met by the contract provision proposed waiver, will otherwise be met absent that specific contract language.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Issue #2 - The Blended Learning pilots have not formally engaged OEA and OEA's position is unknown</strong></td>
<td>• <strong>21st Century Advisory Committee</strong>: Starting in January 2014 OUSD will convene a bi-monthly meeting of diverse stakeholders to continue to build a shared understanding of OUSD’s vision for Personalized Learning. Stakeholders include: OEA leadership and membership, Principals, LCI (Instruction &amp; Curriculum dept) leadership, QAA (Data dept leadership, and IT dept leadership. Together this team will make sure that messaging is aligned and clear.</td>
<td>Jan 2014</td>
<td>Assoc Supt of Instruction (LCI)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Monthly Ed Tech meetings</strong>: This grassroots group of early adopter teachers from across many OUSD schools, including teachers from the Blended Learning pilot, meet monthly to get updates from district leadership, vet and provide feedback on upcoming ideas, and share best practices as a learning community. All of these teachers are OEA members and many are leaders.</td>
<td>In process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Annual Teacher Conference</strong>: The teacher conference is for teachers, by teachers. This year the focus for the teacher conference is “Personalized Learning through Technology”. OEA will be the keynote. Many Blended Learning and other early adopter teachers will be presenters for workshops that they developed themselves.</td>
<td>April 2014</td>
<td></td>
</tr>
</tbody>
</table>
## Critical Barriers: Mitigation Strategy
### Critical Barrier #3 – Capability

<table>
<thead>
<tr>
<th>Personnel Policy Barrier</th>
<th>Plan to Address</th>
<th>By When?</th>
<th>Owner</th>
</tr>
</thead>
</table>
| **Issue #1 – Currently low collaboration time available for PL at sites**                | • *Wed PL:* Every Wednesday afternoon is for teacher professional learning. Once per month the designated Teacher Leaders engage in LCI-led professional learning via an inquiry cohort. All of the other Wednesdays are for site-based, site-led professional learning. Once selected, PL schools will be part of a PL inquiry cohort. Additionally, schools will be expected and protected to focus their site-based Wed professional learning on PL.  
• *Stipends:* Sites will be encouraged to allocate their grant $ for teacher stipends for collaboration time, both with one another and amongst teachers across the city. | 2014-15   | Assoc Supt of Instruction (LCI)      |
| **Issue #2 - Low capacity from OUSD’s LCI department to provide PD around Personalized and competency-based learning and assessments** | • *Learning from our neighbors:* Steering Committee and Coordinating team members will spend a good portion of their time learning, so that they can share the learning across the system. They will learn from OUSD schools, Rogers, EFC and other charter partners.  
• *Learning from the experts, alongside our schools:* LCI and QAA members will participate in the Discovery phase of the Gates application process. This includes webinars, readings, and school visits. | Spring 2014 | Assoc Supt of Instruction (LCI)      |
| **Issue #3 - Low capacity from OUSD’s LCI department to provide instructional technology support** | • *LCI model is changing:* The structure of LCI is changing such that all instructional coaches in a content area are expected to learn the basics of Personalized Learning and gateway practices for using technology to personalize instruction. The idea is to build instructional tech capacity in LCI and QAA staff in order to have a greater reach across the system.  
• Partnering with QAA and IT OUSD will maximize the talents of existing human resources in IT and QAA to be instructional technology supports to schools. | Fall 2014  | Assoc Supt of Instruction (LCI)      |
# Critical Barriers: Mitigation Strategy

To build long-term capability, every relevant department in OUSD will begin to change into one that enables personalized learning at school sites.

<table>
<thead>
<tr>
<th>Department</th>
<th>3-5 Years</th>
<th>3-5 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leadership, Curriculum and Instruction (&quot;LCI&quot;)</strong></td>
<td>Instructional Technology</td>
<td>Personalized Teacher Development&lt;br&gt;Following the personalization movement with students, teachers will receive development in a more personalized manner, which will increase professional excitement and retention in the district</td>
</tr>
<tr>
<td><strong>Quality, Accountability and Assessment (&quot;QAA&quot;)</strong></td>
<td>School Quality Review</td>
<td>School Innovation&lt;br&gt;The “PL design process” will be internally replicated such that schools will have a common method to periodically re-imagine and transform their model, given changing needs and technology</td>
</tr>
<tr>
<td><strong>Information Technology Services</strong></td>
<td>Network Services</td>
<td>Helpdesk and Hardware &amp; Software Support&lt;br&gt;There is a process to impart skills to site-based users, and users can troubleshoot their own devices at Tier 1</td>
</tr>
<tr>
<td>OUSD Department Managers Supporting Cohort 1</td>
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</tbody>
</table>

- **Instructional Technology**<br>Every content-area specialist coach in LCI will become also an instructional technologist in their content area.
- **Personalized Teacher Development**
- **School Quality Review**<br>“Personalization” will be an essential element that review teams look for when examining a school’s quality, setting a baseline that schools can strive to improve upon after the review.
- **School Innovation**
- **Network Services**<br>All schools have high-bandwidth learning environments with optimized uptime and security; infrastructure is “no longer a question”.
- **Helpdesk and Hardware & Software Support**
- **OUSD Department Managers Supporting Cohort 1**
Stakeholder Engagement
The plan requires broad and deep community engagement to have longevity and real success

“In a way, we don’t know what it will take to sustain this work yet because we don’t know what it takes to accomplish it. But we **know what we need to know about sustaining an effort here in Oakland** – we need to articulate an engagement and communications plan that is very authentic, that is deep and wide throughout the process, around tending to the bargaining units, the School Board, and other stakeholders. **So that when the individuals who started this are gone, the program can still continue.** We don’t know what it takes to accomplish this work yet, but if we build authentic relationship between organizations and between departments, then we **set the conditions to come up with the answer.**”—Associate Superintendent of Quality, Accountability and Analytics, OUSD
Stakeholder Engagement

Oakland’s stakeholder engagement plan emphasizes broad and deep stakeholder engagement through a diverse set of channels and methods.

### Stakeholder Engagement Matrix

<table>
<thead>
<tr>
<th>Impact on Stakeholder’s Daily Operations</th>
<th>Influence on Program Decision-Making</th>
<th>Stakeholder Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Low</td>
<td>State Leadership (Governor, Lt Governor)</td>
</tr>
<tr>
<td>Low</td>
<td>Low</td>
<td>Oakland Leadership (Mayor)</td>
</tr>
<tr>
<td>Low</td>
<td>Low</td>
<td>General population of Teachers (Over time to be moved into Involve &amp; Inform)</td>
</tr>
<tr>
<td>Low</td>
<td>Low</td>
<td>General population of Parents &amp; Students (Over time to be moved into Involve &amp; Inform)</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>Regional and Executive Officers, OUSD</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>Area Superintendents, CMOs</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>Oakland Educators Association Executive Board</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>Oakland Education Reform Community (G.O. Public Schools, S.D. Bechtel, Jr. Foundation, etc.)</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>Directors/Managers of Highly Impacted Departments (QAA, LCI, IT, &amp; CMO Equivalents)</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>School Leaders (Early Adopters)</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>Teacher Leaders (Early Adopters)</td>
</tr>
</tbody>
</table>

#### Stakeholder Engagement

**Consult & Collaborate**

*Should be consulted for their subject matter expertise & influence within the district*

- School Board, OUSD
- Superintendent & Cabinet, OUSD
- Executive Leaders, CMOs
- State Leadership (California Department of Education)
- Directors/Managers of Medium Impacted Departments (HR, Finance, & CMO Equivalents)
- General population of School Leaders (Over time to be moved into Enlist & Engage)
- General population of Teacher Leaders (Over time to be moved into Enlist & Engage)

**Enlist & Engage**

*Lead program execution; need opportunities to build commitment & ownership*

- Regional and Executive Officers, OUSD
- Area Superintendents, CMOs
- Oakland Educators Association Executive Board
- Oakland Education Reform Community (G.O. Public Schools, S.D. Bechtel, Jr. Foundation, etc.)
- Directors/Managers of Highly Impacted Departments (QAA, LCI, IT, & CMO Equivalents)
- School Leaders (Early Adopters)
- Teacher Leaders (Early Adopters)

**Keep Informed**

*Need to be kept aware of general project information but will generally not require significant involvement*

- State Leadership (Governor, Lt Governor)
- Oakland Leadership (Mayor)
- General population of Teachers (Over time to be moved into Involve & Inform)
- General population of Parents & Students (Over time to be moved into Involve & Inform)

**Involve & Inform**

*Must understand how their jobs are affected and what skills they will need to make the transition*

- Teachers (Early Adopters)
- Parents & Students (Early Adopters)
- Community Partners (OTX West, Oakland Schools Foundation)

Source: Mastery Design Collaborative
Not only do we want to immediately personalize learning at ~3-5 schools, but we want to make Personalized Learning a part of our DNA

- Short-Term Goal:
  - ~3-5 Next Gen Schools in Oakland

- System Tenets:
  - This is not about one school, but about deeply embedding continuous innovation
  - Cross-entity collaboration is crucial for long term system-wide change
  - Personalization can be achieved with and without technology

- Long-Term Change:
  - A city working together to ensure that all students are college, career and community ready