

**Alameda County Office of Education / Oakland Unified School District Trustee**

**Combined Listening Meeting Notes – June 2021**

On June 1-3, 2021, FCMAT representatives held a series of virtual listening meetings with stakeholders of the Oakland Unified School District (OUSD / district). Representing FCMAT were Michelle Giacomini, Deputy Executive Officer, and Michael Fine, Chief Executive Officer. The purpose of these meetings was to solicit public input on the qualities the stakeholders desired in the next county trustee to be assigned to OUSD. Those qualities have been documented on the following pages and were used 1) to inform questions and topics that FCMAT asked applicants to respond to in their required letter of interest to FCMAT to serve in the county trustee role (see below), and 2) to help develop the evaluation rubric used by FCMAT to vet the applicants. It is hoped that this input will also be used by the Alameda County Office of Education (ACOE) to inform interview questions and the final selection decision.

Approximately 20 stakeholders participated in a series of one-on-one and small group conversations. These stakeholders included board members (6 of 7 participated), teacher association leaders, parents, principals, extended cabinet members, and community members. The classified employee association and most middle management and school site leaders declined to participate.

Five themes emerged from the listening meetings. Those themes are listed below, and the meeting notes on the following pages are generally organized around themes. The questions applicants were asked to address in their letters of interest as part of the application process are also noted below under the corresponding theme. A sixth, miscellaneous, category was created to capture all other input. The items in the miscellaneous category are important to review and consider; they were simply brought up with less frequency than other input that influenced the five themes.

1. The role of the trustee is defined in Education Code and is generally viewed as a facilitator to local governance and long-term stability. It is different than a county superintendent's normal oversight role under Assembly Bill 1200, et seq.

What does an effective and healthy relationship between the board, district superintendent / staff, county superintendent and county trustee look like?

2. Good communication and listening skills that engender strong professional relationships and accessibility are crucial to facilitate difficult choices and decisions.

As trustee you may be required to intervene with the district’s leadership and board on an item they are planning to act on. How will you approach communicating your concern about the direction the district is contemplating?

3. Strong experience in school business, school facilities and labor negotiations is essential.

Describe your experience in school business, school facilities and labor negotiations as it relates to serving as a county trustee for OUSD. Additionally, describe your specific view of the trustee’s role in budget development and monitoring as it relates to long-term fiscal stability and equitable allocation of resources.

4. Transparency and trustworthiness are critical attributes for decision-makers.

Describe how you will build trust between yourself, district board and staff, and community stakeholders, and instill transparent approaches to decision making.

5. Good governance is key to well operated school districts.

Describe how you will help the board make sound decisions that promote improved outcomes for all students, enhance an equity mindset, and ensure accountability.

In presenting the notes from the meetings on the following pages, most duplicate comments were not removed. These notes are a compilation from two sources; they have not been edited. The notes under each section are listed in alphabetical order.

<b><u>Communications</u></b>
Be prepared to be beat up, but say what needs to be said
Candid with feedback
Clarity of communication – “What is the issue?”
Communicate “hard to hear” info respectfully
Communicate with labor partners, especially in light of one-time money
Communication
Communication from / with trustee
Communication skills
Communicative with board
Dynamic messenger
Effective communicator

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FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

Engaging
Fortitude to say what needs to be said even if going to get beat up – not being dismissive or arrogant, yet clear
Good communication skills
Good listener
Good listener
Have a backbone
Help others understand
Need good communicator to many parties and does it well
Needs to be able to tell superintendent and board hard realities
Openness is more important than being from community
Responsive and open; candid; realistic
Sounding board; answers questions
Strong communicator
Strong communicator of trustee's perspective
Willing to share alternative ideas
Willing to speak about the hard realities
Willing to speak up
Willing to speak up to district and board
<b>Equity</b>
Advocates for needs of students
Cultural competency
Culturally competent
Culturally competent
Experience with students of color
Focus on diversity
Focused on outcomes for kids
Must be willing to look at racial impact of citywide plan blueprint
Not just a face / token but holds values around equity and racial justice
Person who reflects student population – if not person of color – not just a token – someone who believes in racial justice
Reflective of student population
Spending a lot of dollars to keep sites open for too few kids – but need those dollars to serve more students
Values diversity
<b>Governance</b>
Adherence to prior fiscal policy
Appeal to interest of board and others but balance with quality education for students
Balance / counter irrational exuberance (one-time funding)
Balance “we can have it all” with “we can't have it all” perspectives
Balance short term vs. long term
Be firm re right sizing facilities to enrollment and needs
Blueprint coming up – needs to be firm to hold to it

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ASSISTANCE TEAM

Break down the seven independent kingdoms of the board – big cultural change
Budget / fiscal responsibilities is #1
Clarity on budget decisions, what resources are actually available
Connect budget to student outcomes
Connect instruction to the budget
Ensure budget speaks to needs of children
Experience with governance
Fiscal responsibility
Fiscally responsible is most important
Focus on multiyear financial projections and structural fiscal issues
Hold district accountable
Knows about governance
Most important consideration is understanding board dynamics
Narrow and focus to achieve goals
Policy 3150
Policy 3150
Political savvy
Puts good of the district ahead of good of individual trustee areas or of influential stakeholders
Strength in governance
Strive for consistency in policy direction
Strong governance skills
Sustainability
Teach board how to govern
The board needs to stop governing by resolution
Understand that numbers have people and impacts behind them
Understanding board dynamics
Vigilant when needs to be (i.e., structural deficit)
<b>Miscellaneous</b>
Another Chris
Approach to role – intensive, priorities, alignment with COE oversight message, supportive, attitude, accountability, and urgency
Be local to be engaged
Believes in democratic process of local control
Biggest OUSD issue is small schools and small classes leading to overstaffing and higher costs
Bring stability during leadership change
Can be an outsider to OUSD
Chris has been good trustee – model after him
Chris is a good example of who the next trustee should be
Clarity on who is/are decision maker(s) in OUSD
COE needs to learn how to support district
Commitment through end of loan period
Consistency
Consistency is critical, especially given turnover in district

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Do right by the kids
Doesn't believe the district needs a trustee
Doesn't have to be a community member
Doesn't have to be from Oakland, but great if it could happen
Engaged until very end
Facilities not at top
Faith in superintendent
Get Oakland perspective – know how to obtain
Help to instill need for succession planning
Helpful to be an outsider and bring outside perspective
Honest
How does trustee show parents and stakeholders dignity
Improve how the trustee exercises authority – can't feel like an attack on the board or staff; recent recipe was disastrous and created distrust; missteps were fueled by COE not the trustee, COE doesn't understand their role
Incredible superintendent
Irrational exuberance
Keep momentum going
Knows district
Last trustee to help cross the finish line
Local
Local perspective, but downfall if it is an Oakland-specific person
More important than being from community is being willing to understand and listen so can move the district forward
Must have knowledge of district
Need sense of urgency
Needs to be firm
Needs to understand history of OUSD and have a local perspective
Not necessarily from Oakland
Person of color
Person of color preferred, but not required
Person of color preferred, but not required
Re finances – value added to have a non-OUSD experience to provide alternatives to the OUSD way
Realistic, flexible
Should be local—greater bay area – could be downfall if actually from Oakland
Should be the last trustee
Stable
Targeted accountability
Thick skinned, challenging place
Thick skinned; can't buckle under politics
Tough conversations harder because it's not just small schools but also small classes
Trust superintendent
Understand Oakland, local community context

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Understand the challenge of outsiders influencing OUSD
Understanding labor or at least know who to reach out to
Understanding OUSD's uniqueness and challenges
Wants to pay off the loan with AB 1840 funds and one-time funds
Would be nice if the person was from Oakland
<b>Relationships</b>
Ability to build relationships with board members
Accessible to community members
Available for calls / consultation by board members
Available to all stakeholders
Build and maintain delicate balance in relationship with county, board, district staff
Build capacity with board and staff
Build relationship with board
Build relationships
Build relationships
Collaborate with superintendent – brainstorm approaches
Develop relationship with board
Diplomacy
Engage tough conversations between county office and district to ensure cuts are made
Existing relationships in Alameda, Oakland helpful
Good listener
Help bring folks together
Interpersonal skill (Chris as example)
Interpersonal skills
Interpersonal skills – able to take “attacks”
Is objective and diplomatic (important for backbone)
Open to parents, students, and community
Partner, asset (Chris is a great example)
Positive history with labor relations
Problem solver
Relationship in Alameda County and / or Oakland
Relationships are critical – it's a tough balancing act between county, FCMAT and district
Strong interpersonal skills
Strong relationship with board – avoid the whiplash the board creates, pet projects
Strong relationship with superintendent and chief business official
Strong with board relationships and management
Supportive relationship with board
Trusting, build a trusting relationship with board
Work in concert with ACOE, OUSD, FCMAT, state agencies
<b>Role of Trustee</b>
“Be the adult in the room.”
Accountable to community
Adherence to prior resolutions or new direction

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ASSISTANCE TEAM

Adherence to prior resolutions so that they are implemented, and fiscal stability is maintained
Aligned with values of superintendent regarding fiscal stability and equity focus
Alignment with board
Alignment with county partner
Assist leadership when asked
Available to all stakeholders to answer questions
Balance practical realities and outcomes with ideological positions, i.e., aligned with long-term sustainability, equity and outcomes for students
Be strategic and help superintendent and board be strategic
Believes in democratic process
Can provide cover to board
Cares about mission with students and student outcomes
Clarity around roles – AB 1200 oversight vs trustee-supportive role, avoid mixed messages
Clarity on who the trustee supports – OUSD school board (not the COE intensive support effort, which supports OUSD staff)
Collaborate
Collaborate with ACOE, district, community to move district forward
Committed through finish line
Communicator of concerns, perspectives
Courageous leader
Cut through noise – “this is the direction you should take to help students”
Cut through the noise
Dichotomy of thoughts from COE needs to be resolved
Distinguish AB 1840 trustee role from ACOE AB 1200 oversight role
District doesn’t know the “how,” and often the “why” gets lost – trustee needs to clarify
District needs targeted accountability – trustee needs to know what to focus on and help district with it
Engaged with community
Facilitate crossing the finish line
Finds ways to help district be solvent without having to close schools
First introduction to community should not be a stay or rescind action
Fiscal perspective necessary
Focused on getting district to the finish line
Has to be the adult in the room
Have an objective fiscal perspective
Help cut through the noise
Help cut through the stakeholder interaction
Help frame conversations
Help interpret information
Help move district forward
Help uplift community
Helpful for trustee to provide cover to superintendent and board to do the right thing around long-term sustainability and tough decisions
Helps build internal capacity

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ASSISTANCE TEAM

Holds community meetings
How does trustee approach multiple issues facing district, especially school closures
Inform community of trustee role
Insist on transparency for relevant content
Keep board's eyes focused on long-term sustainability
Knowledgeable about healthy fiscal conditions and how to achieve
Long-term sustainability over short-term goals
Look for alternatives to closing schools and deep budget cuts
Look for stabilization alternatives
Move the ball to finish line
Must be present; attend budget community meetings
Must be reserved but speak up if necessary
Must develop a strategy to move the district across the finish line
Navigate through and guide the board
Need a thought partner for strategic plan
Needs to be committed until loans are paid off; longevity will be important
Needs to be courageous (despite lack of support by COE)
Needs to make sure they fact-check
New person needs to be open and supportive
Not get caught up in the drama
Not overbearing
Nuts and bolts role
Reality checker
Recognizes good governance, help board be good / successful board members and governance team (a step missed during recovery and dealt with since)
Resolve / change the confusion between roles re COE chief business official and trustee – needs clarification
Responsive to board and staff
Strengthen fiscal operations staff and capacity re detail budgets and programs (LCAP, programs, one-time \$)
Strong attention to better use of district facilities
Strong communicator of what district needs and how to address needs
Successful with budgeting, especially with budget cuts. Knows how to present and how to make the decisions / cuts.
Successful with budgeting, making hard choices
Support superintendent and her vision and key factors for long-term decision making
Supporting superintendent's team to make hard decisions
Supportive
Teach new board
Thought partner with superintendent and board 1) strategic plan and other, 2) decision making around strategic plan, 3) focus, avoid rabbit holes, keep board focused on policy and implementation, 4) discipline around board meetings would be helpful
Tough decisions are ahead. Will need to be ready.
Train the board on fiscal, governance, facilities, etc.



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Training board members
Trustee needs to convey message from COE oversight and help board understand message, urgency, importance, and help interpret
Trustee serves in stopgap role
Trustee should lead, coach, guide vs provide oversight; identify an alternative way for trustee to operate
Trustee that will facilitate full local control and moving the district across the finish line
Understands budgets and how to dive into district-specific budget information
Uplift involved community members
Vigilant on structural budget issues
Visible to community, board, and staff
Will answer all questions
Willing to engage in tough conversations with board, COE staff
Willing to guide through hard decisions
Willing to have a sobering conversation re approach to governance
Willing to speak up – could decrease audit findings
Willing to voice opinion, speak up
Willingness to play the role
<b>Transparency</b>
Clarity of financial condition and financial risks
Community involvement and engagement is lacking
Factual
Insists on / promotes transparency re fiscal matters and context
Need clarity in role
Open / transparent in their dealings with board, community, staff
Transparency
Transparent
Transparent to community, parents, and labor
Truth teller
Truth teller
<b>Experience</b>
“Have you considered this...?”
“Prevent others from tying the district’s hands”
Appreciate and lean on good staff leaders at all levels
Assertive
Assist in building internal capacity at OUSD
Aware of district – current status and where the district needs to go
Background in strong school leadership
Balance pleasing everyone – demonstrate fiscal stewardship
Broad knowledge of what it takes to run district
Build capacity
Coach board
Continue to build internal business operations capacity

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County leadership experience
Creditability – knows their subject
Demonstrated skill - strong school business background
Detail orientated
District leadership experience
Ensure all have equal airtime
Experience in governance
Experience in governance, superintendent, school business
Experience in public education, not just finance
Experience with bond programs and bond oversight – stick and land a decision re facilities
Experience with diverse populations, urban settings
Experience with labor partners
Experience with labor partners and collective bargaining – need strong fiscal team to support collective bargaining, need guidance to avoid collective bargaining encroaching on programs
Experience with public education, not just finance
Experienced
Experienced with labor and negotiations
Experienced with politics (understanding that politics are nasty)
Financial expertise
Financial expertise
Financial intelligence
Gives of time
Hands-on
Hands-on with staff
Has school administration experience at high level
Hold instruction accountable
Intensive work
Know how to deal with personal attacks
Know how to fulfill your role in public vs. in private
Must be experienced as business office is being rebuilt and chief business official is new
Objective
Objective person
Positive history with labor relations
Provide advice
Reserved in exercising authority but not afraid to exercise it
Roll up sleeves and get to know district
School experience at a high level
Skilled
Skills and action focus
Someone that can coach / teach a new board – work with them
Someone with bond oversight experience
Strong background in all aspects of school business
Strong background in practical leadership – school, district, county

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Strong experience / touch points in schools
Strong fiscal background
Subject matter expert
Trust in those staff that are high quality at senior management, middle management, principals, teachers
Understand community interests around school stability
Understand need for collaboration
Understand need for flexibility
Understand OUSD as a big district, urban, size, community, diversity
Understands big district stuff
Understands competing pressures
Urban context
Urban district context
Well-seasoned in fiscal management
Will have to educate board
Willing to lean in