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The Oakland Public Education Fund (Ed Fund) leads the development and investment of community resources in all Oakland public schools so that all students can learn, grow, and thrive. Through its fiscally sponsored projects, Oakland School Volunteers program, A to Z fund, and other community-focused partnerships, the Ed Fund aims to give Oakland kids the tools they need to succeed.

In November 2018, the Oakland Public Education Fund (Ed Fund) engaged Learning for Action (LFA) to support a strategic planning process that will enable it to make key decisions about how to best serve public schools in the Oakland Unified School District (OUSD). The Ed Fund has expanded both its programming and fiscal sponsorship significantly in the past several years and understood the benefit of an evaluation of the impact and effectiveness of its expanded role as well as strategic thinking about how to evolve its programs and fiscal sponsorship services for sustainability and continued impact.

This strategic plan is the result of that assessment. It clarifies the mission, vision and values of the organization, identifies strategies that will strengthen its fiscal sponsorship and other programming, and lays out a set of initiatives that the organization will implement over the coming 3-5 years to improve its performance and increase its impact.
The navigation of the planning process was led by a Strategic Planning Committee, comprised of Ed Fund staff, board members, and an OUSD representative:

- Joel Mackey, Executive Director
- Bob Spencer, Board President
- Helen Bulwik, Board Member / Development Chair
- Marjorie Goux, Board Member
- Betsy Merzenich, Board Member
- David Korsak, Chief Finance Officer (previous)
- Jennifer Quinn, Chief Financial Officer (current)
- Jonathan Osler, Development Director
- Ali Medina, Director of Programs
- Lilly Smith, Program Manager, Oakland School Volunteers
- Curtiss Sarikey, Chief of Staff, Oakland Unified School District
The organizational assessment drew from three main sources:

- **Interviews with external stakeholders.** LFA conducted interviews with 12 external stakeholders – including funders, fiscally sponsored projects, peer organizations, principals, and an OUSD representative – and two focus groups with staff to solicit feedback about the organization’s overall functioning, the impact and value of different programs, and the external environment.

- **Funding model analysis.** With the assistance of finance staff and an invaluable volunteer, LFA reviewed the Ed Fund’s funding model and guided the development of financial analysis and cost modeling to gain insights about the full financial cost of fiscal sponsorship and about the strengths and vulnerabilities of the model.

- **Board and staff input.** In addition to four Strategic Planning Committee meetings, LFA facilitated two staff and board sessions. The first session focused on articulating the key components of the Ed Fund’s Theory of Change. The second session invited staff and board to identify organizational and programmatic priorities based on findings from interviews and the funding model analysis.
WHAT WE DISCOVERED

The stakeholder interviews drew out valuable perspectives about the Ed Fund’s programming, operations, and priorities for strategic direction. Four key findings are summarized at a high-level below, and explored in greater detail in a memo. These perspectives informed the development of the Theory of Change and the set of strategies that guide the Ed Fund’s work for the next 3-5 years.

- The Ed Fund has grown significantly in the past several years and is at a natural place for revisiting the directions it has grown in as well as the extent to which it has the organizational capacities in place to sustain the growth within the Oakland educational environment.

- The Ed Fund is seen as a trusted intermediary to marshal financial and human resources in service of Oakland student success. It has a reputation as a neutral and accountable enabling mechanism for funds and resources to be quickly and flexibly distributed to Oakland public schools with the greatest need, to meet their unique needs.

- A critical need for the Ed Fund is to tighten up fiscal sponsorship operations, which represent the greatest proportion of the organization’s resources and energy as well as of the organization’s risk profile. Stakeholders sense that staff and infrastructure have not caught up with program growth, resulting in some miscommunication and efficiency concerns.

- It is important for the Ed Fund and OUSD to continue and strengthen their ongoing partnership in service of Oakland public school students. Strong coordination between the two parties will help leverage more resources into Oakland schools.
WHAT WE DISCOVERED: FUNDING MODEL

Overall, the Ed Fund has a relatively healthy balance of funding sources, dominated by fiscal sponsorship revenues. Individual donations – which are typically unrestricted – along with corporate giving are revenue sources with potential to increase.
WHAT WE DISCOVERED: FISCAL SPONSORSHIP

The fiscal sponsorship program has grown significantly over the past three years, as evidenced by the bar graph below depicting total fiscally sponsored project fee revenue for FY18.

However, there are several attributes of the Ed Fund’s fiscal sponsorship program model that are challenging. First, due to a history of fee-setting that has been based on negotiation and other circumstantial factors, fees vary widely, ranging from near 0% to 16%. Second, a significant number of projects that have low fee rates take a substantial amount of time to serve, meaning that the Ed Fund loses potentially large sums of money on these projects, challenging the viability of the overall program.
A Theory of Change identifies the outcomes that an organization expects to see in its focal population(s) and describes how specific program components are formulated and interact to produce those outcomes.

The Ed Fund board and staff came together in May 2019 to articulate the set of assumptions, strategies, and components that guide its work – the pieces of a Theory of Change. Staff and board broke into small groups to discuss. These rich conversations were used to craft a working draft of a Theory of Change, which was reviewed and iterated several times by the Strategic Planning Committee, staff, and board.

The high-level Theory of Change can be found on the following page. The full Theory of Change describes the program components and how they’re delivered.
Oakland Public Education Fund: **Theory of Change**

**EQUITY • DATA-DRIVEN • IMPACT-DRIVEN • CHANGE-MAKING • STABLE & SUSTAINABLE**

**Volunteers**
Provide in-school support to classroom teachers and students

**Funders**
- FOUNDATIONS
- INDIVIDUALS
- CORPORATE

Invest substantially in ways and places that meet the greatest need

**Fiscally Sponsored Projects**

Attract, manage, and deploy funds with maximum efficiency

**Ensure that...**

Public schools in Oakland have an ample, reliable supply of well-managed financial and human resources to meet their students’ learning and life needs

**OUR COMMITMENT**

EVERY student in Oakland graduates college, career, and community ready

**Supporting Activities**
- Convene
- Promote
- Advocate
- Celebrate
Data collected through stakeholder feedback, and arrayed in the context of the Ed Fund’s new Theory of Change, provide a clear set of priorities for the organization to address in the coming 3 years.

It is clear that strengthening the Ed Fund’s largest service area - fiscal sponsorship – is critical to both achieving impact for the communities served by the projects and ensuring the sustainability of the Ed Fund so that it can continue to support Oakland schools and students in the many ways that it does. It is also important for the Ed Fund to build on the success it has achieved in institutionalizing the Oakland School Volunteers program and bring even more volunteer support to schools and students in Oakland. Lastly, increasing clarity around the design and objectives of other mechanisms employed by the Ed Fund to support teachers, schools, and students – including continuing to rally the support and investment of the Oakland community – is critical to ensuring the continuation and maximization of resources the Ed Fund is able to secure.

To support these programmatic objectives and ensure the ongoing performance of the Ed Fund as an organization, it is also critical to strengthen the funding model and its organizational capacities to execute on it. Also, it will be necessary to take the Ed Fund’s technology infrastructure and know-how to a new level, and more fully develop the organization’s capacity to collect and learn from data on its intended impact.

To illuminate the way forward, the Ed Fund has identified 3 program strategies (how it will evolve and improve its program model for maximum mission impact) and 3 organizational strategies (how it will strengthen its organization to deliver on the program model), which are presented on the following pages with:

- A narrative description of why the strategy was selected;
- A goal statement describing what the Ed Fund would like to see in 3 years as a result of the strategy; and
- High-level descriptions of the tactics that will need to be carried out in each of the 3 years to execute on the strategy.
Why this strategy?

The Ed Fund’s fiscal sponsorship program has grown significantly over the last three years. Two large fiscally sponsored projects sponsored by Intel and Salesforce taken on in 2016 gave the Ed Fund an opportunity to learn how to manage projects with a large volume of financial transactions and human resource requirements. With these recent advancements in mind, the Ed Fund will further strengthen its fiscal sponsorship program by developing a business model for it that will ensure that it generates adequate resources to provide - and effectively manage - a more robust and user-friendly set of supports and services for its fiscally sponsored projects.

2022 GOAL: Improved customer satisfaction (90% of clients rate services as “very good” or “excellent”) and fiscal sponsor project growth (FSP gross receipts increase by 20%)

Tactics:

2020

- Design business model, including new cost structure, menu of services, portfolio, and staffing model
- Design and conduct communications (including new annual survey) with FSPs
- Execute new FSP agreements with existing model A and C FSPs
- Research and create new model agreement for OUSD schools that enables staffing to be done by the Ed Fund
- Market new FSP program

2021

- Evaluate cost structure and menu of services and redesign as needed
- Conduct feasibility study for contracted back office services
- Evaluate exit processes and redesign as needed
- Conduct additional market research and share learnings

2022

- Design and build out a series of workshops and other capacity building supports for fiscally sponsored projects
- Conduct feasibility study for cohort-based evaluation building program
Why this strategy?

In its third year since inheriting it from OUSD, the Oakland School Volunteers (OSV) program continues to reliably recruit, manage, support, and deploy a wide range of community volunteers to Oakland schools that need the help. OSV also continues to develop new and creative ways to match interested parties with opportunities to benefit and support Oakland students. From this place of stability, OSV wishes to grow both the supply of and demand for volunteers in ways that can deepen the impact of the OSV program on Oakland schools and students, particularly those that have the greatest barriers to achieving success.

**2022 GOAL:** 25% increase in volunteers

**Tactics:**

- **2020**
  - Launch redesign of corporate volunteer program; market to recruit more business participants
  - Launch mentorship element (Career Coaches) of community volunteer program; market program and recruit new volunteers
  - Explore developing a rubric to support the Ed Fund to prioritize schools and students with the greatest needs

- **2021**
  - Update and conduct evaluation of corporate volunteer program and use output to inform additional program redesign and communications
  - Evaluate Career Coach program and use output to inform additional program redesign and communications
  - Build out and launch system for tracking volunteer time

- **2022**
  - Conduct communications campaign about OSV and student and school success and impact stories to garner more support
INCREASE FOCUS AND CLARITY OF PROGRAM MODEL

Why this strategy?

The Ed Fund’s responsiveness as a community organization can get it into trouble when it takes on things just because a school or community wants them to happen -- and the Ed Fund has the resources and operational capabilities to make it happen. Moving forward, the Ed Fund wishes to be more planful and intentional about the activities it undertakes and ensure that they are of high value, contributing concretely to outcomes on its Theory of Change, and receive leadership and support from a dedicated Ed Fund staff person. The two immediate areas of work in need of a more planful approach are a) the Ed Fund’s role carrying out the “Supporting Activities” listed on the Theory of Change and b) the TechLink project which is being converted from an FSP (with Intel as a sponsor) to a program of the Ed Fund that needs its own business plan and dedicated staffing support. Furthermore, there is an imperative to evaluate the design and impact of its supporting activities through an equity lens to ensure the most vulnerable students and communities are receiving the support they need.

2022 GOAL: The Ed Fund’s program model is well-resourced, effectively managed, and advances equity for Oakland students, and all program components have metrics of success identified.

Tactics:

- Develop messaging and execute a citywide publicity campaign
- Develop business plan for Supporting Activities that focuses activities and maps activities to outcomes from TOC
- Develop business plan for TechLink; launch marketing and fundraising activities (including securing a long-term investment from Intel)

2021:

- Explore more formal role for the Ed Fund in advancing systemic improvements for Oakland public education
- Design and implement staffing to execute Supporting Activities
- Design and implement staffing to execute TechLink; cultivate community partnerships

2022:

- Evaluate Supporting Activities programming and redesign as needed
- Evaluate TechLink and redesign as needed
INCREASE LEVEL AND DIVERSITY OF FUNDING

Why this strategy?

The Ed Fund has grown in recent years, securing an increased level of resources for a variety of activities. An analysis of the Ed Fund’s fiscal sponsorship funding model shows that a) fiscal sponsorship services generate over half of the organization’s revenues, and b) there are inconsistencies with how the fiscal sponsorship business model has been executed. To strengthen the organization-wide funding model in a way that will promote greater sustainability, the Ed Fund knows that it must simultaneously expand its fiscal sponsorship services and significantly increase two important sources of revenue: individual donors and corporate giving/sponsorship.

2022 GOALS:

- Increase individual giving by $150K
- Increase foundation giving by $100K
- Increase corporate giving by $350K
- Increase Fiscal Sponsorship fee revenue by $400K

Tactics:

2020
- Develop and implement an approach to market FSP
- Conduct research on and outreach to 10+ corporate giving programs
- Develop and implement individual donor cultivation plan with board
- Identify 5+ new foundation relationships to cultivate on behalf of Ed Fund or FSPs

2021
- Formalize partnerships with 5+ new corporate giving programs
- Continue individual donor cultivation and asks
- Conduct feasibility study for securing state and federal funding in partnership with OUSD

2022
- Explore feasibility of FSP capacity building initiative and pitch to funders
- Analyze individual donor progress and make adjustments to approach
- Analyze FSP revenue and make adjustments to funding model
ORGANIZATIONAL STRATEGIES

5

LEVERAGE TECHNOLOGY TO INCREASE EFFICIENCY

Why this strategy?

The Ed Fund has made significant strides in recent years in enhancing both IT infrastructure and staffing. However, potential still remains to improve technology in ways that can support efficiency across the organization, but especially in managing fiscally sponsored projects, given the number of staff that are involved in those relationships and transactions. Specifically, there are opportunities to increase automation in transactions and information dissemination within the fiscal sponsorship program, to increase the interoperability of data systems involved in the fiscal sponsorship program, and to enhance the capacity of the Ed Fund’s IT systems to support improved knowledge management across all programs.

2022 GOAL: Ed Fund staff report decreased time spent providing and accessing information, and increased ability to access the information they need to carry out their responsibilities.

Tactics:

2020

• Determine whether to hire IT consultant or manage initiative in-house
• Develop work plan for IT enhancements
• Develop metrics of success for IT system improvements

2021

• Design and implement improved knowledge management system
• Raise additional funds for IT enhancements as needed

2022

• Review work plan progress and make adjustments as needed
**ORGANIZATIONAL STRATEGIES**

**6 INCREASE EVALUATION AND LEARNING CAPACITY**

**Why this strategy?**

As evidenced by its new Theory of Change, the Ed Fund is taking on an increasingly sophisticated and multifaceted role in supporting Oakland students, and the schools they attend, to thrive. To support its ability to be successful in this role, and building on the Theory of Change that was produced as a part of this strategic planning process, the Ed Fund will embark on an initiative to collect data on the outcomes identified in the Theory of Change and develop the systems and practices to use that data for learning and improvement – as well as to share with other community partners information about what works to support the success of students in Oakland public schools.

**2022 GOAL:** Staff and board have meaningful data about program impact and use it to demonstrate impact, improve program design and implementation, and share with other stakeholders insights about what works to support Oakland student success.

**Tactics:**

**2020**

- Develop metrics of success for each program, including for FSPs by type
- Establish composition and charge of Evaluation and Learning Task Force

**2021**

- Create new data collection instruments and practices as needed
- Ensure data systems can store and report on success metrics

**2022**

- Build data collection, analysis, reporting, and learning roles into job descriptions as needed
- Train staff and board in evaluation and learning systems, practices, and culture
This plan lays out a roadmap for the Ed Fund to advance six strategies that it believes it must execute in service of achieving its ultimate impact: that every student in Oakland graduates college, career, and community ready.

To ensure the executability of these strategies, teams will be formed to create implementation plans for each strategy that map out the action steps associated with each tactic along with details about the timeline, responsible parties, and resources required to carry it out.

Also, because the environment around the Ed Fund is so dynamic, it is necessary to create and maintain a set of benchmarks and corresponding measurement tools that provide up-to-date information on things that can affect our progress. To this end, the Ed Fund will convene a hybrid board/staff working group that will convene once per year to collect and review data about progress towards each of the goals contained in this document and ensure that adjustments are made to keep the plan on track.
APPENDIX: THEORY OF CHANGE DETAIL
Oakland Public Education Fund: **Theory of Change**

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Supporting Activities
- Convene
- Promote
- Advocate
- Celebrate
The Ed Fund partners with the Oakland Unified School District to advance a shared vision in which schools have the resources they need to ensure that all students can thrive. The Ed Fund serves as the philanthropic arm for the District, helping it to mobilize resources by providing an efficient, dedicated repository and distribution mechanism for charitable contributions directed towards a variety of channels and purposes. To enable this functionality, the District and the Ed Fund also collaborate in a range of supporting activities to create the enabling conditions for effective investment in the success of all Oakland students:

- Cultivate and nurture relationships with a wide range of philanthropic institutions and individuals to inspire and enable their giving
- Demonstrate and communicate the impact of investing in Oakland public schools and their students to help motivate and focus investment
- Identify and communicate the most high priority needs for Oakland schools and students and help stakeholders learn about effective investments and approaches
- Celebrate and promote public schools and their teachers that are enabling the success of Oakland students

The Oakland Public Education Fund supports Oakland public schools by mobilizing resources from and through three distinct stakeholder groups.

**Volunteers**

The Oakland Public Education Fund runs the Oakland School Volunteers program for every Oakland public school. The program supports and recruits parents, community members, community groups, and corporate partners to provide ongoing and one-time support to schools.

The Oakland School Volunteers program:
- Recruits, screens, trains, and matches volunteers with opportunities to support students based on educators’ requests for volunteer support.
- Hosts city-wide volunteer events to positively impact school culture and student success
- Invites local businesses to Adopt an Oakland School

**Funders**

The Ed Fund is the only organization dedicated to raising resources for all Oakland public schools. In partnership with OUSD, the Fund leads the cultivation, development and investment of philanthropic resources, including financial, human, and in-kind.

We build relationships with different individuals and entities that want to support Oakland public schools, listen to their ideas about what impact they want to have, and use our deep expertise in the field and knowledge about needs to build and support partnerships that result in increased resources for school communities.

**Fiscally Sponsored Projects**

The Ed Fund is the 501(c)(3) fiscal sponsor for a range of Oakland public schools, OUSD departments, as well as other projects that serve Oakland students, their families, and the broader community.

As a fiscal sponsor, the Ed Fund provides financial and human resources capacity to sponsors, serving as their employer of record and partnering with them to responsibly manage their funds. This way the sponsors can spend their valuable time and energy focusing on helping Oakland students succeed.
**DESired Outcomes for Stakeholder Groups**

As a result of its efforts to attract, manage, and distribute human and financial resources to the areas of greatest need, the Ed Fund expects the stakeholder groups that are sources (volunteers and funders) and distributors (Fiscally Sponsored Projects) of resources to do more of what they do, and do it better. If the Ed Fund is an effective mobilizer of these resources, it expects to see the following outcomes for each of its stakeholder groups:

**Volunteers**

- Provide in-school support to classroom teachers and students
- Increase their own level of time investment and recruit their friends and family (even those that do not have kids) to volunteer
- Become increasingly skilled at working with students
- Develop a deeper understanding of challenges facing students and schools in Oakland

**Funders**

(Foundations, Individuals, & Corporate)

- Invest substantially in ways and places that meet the greatest need
- Increase their own investments (including making more multi-year investments)
- Recruit their peers to support Oakland students
- Invest their resources in ways that are more responsive to student and school needs
- Become better networked with both peers and other players in the public education space in Oakland

**Fiscally Sponsored Projects**

- Attract, manage, and deploy funds with maximum efficiency
- FSPs are more solvent and sustainable
- FSPs have increased capacity to measure and learn from their impact
- FSPs have a broad network of support for getting their work done (both in the community and within their organizations)
If Oakland students are to succeed, the public schools they learn in – both traditional and charter – must be healthy environments that promote positive physical, emotional, and cognitive development. For this to be true, school facilities must be healthy and in good repair; teachers must deliver high quality curriculum in inclusive environments, and administrators must be constantly striving to ensure all students’ needs are met. In partnership with OUSD, the Ed Fund mobilizes resources with the goal of ensuring that every Oakland school—especially those serving under-resourced communities—develops positive learning environments. We will know we are being successful in strengthening schools if:

- **Schools have adequate, reliable resources that fill gaps in, and enhance, learning experiences and environments:** Core to promoting student success is ensuring that schools have the resources they need to provide robust learning experiences for students. This includes schools having access to a skilled workforce and community volunteers that contribute to fulfilling their mission. Because schools in Oakland are historically under-resourced, part of the Ed Fund’s work is to build the capacity of schools to attract and manage new resources.

- **Schools take ownership over their own performance and quality:** As partners to schools in improving outcomes for students, the Ed Fund supports schools in their journey to continuous improvement. This requires both listening to schools and their communities about what their needs are and offering guidance around how to best meet those needs.

- **Teachers feel supported and stay in the school district:** Teachers are schools’ most important resource, and as such are a focal point of any effort to strengthen schools and improving learning environments. Large class sizes and full schedules create significant emotional strain for teachers and contribute to high rates of turnover, which is disruptive to students’ learning. The Ed Fund cares that teachers receive the compensation and professional development they need to excel at and continue in their critical role educating our students.

- **Post-High School Plan in Hand:** Students graduate from high school motivated, focused, and resourceful in pursuing their post-high school plans.

- **Academically Proficient:** Through the course of their educational experience, students become proficient in the content, skills, and habits needed to achieve academic success.

- **Civically Engaged:** Through real life experiences of connection with civic institutions, students become capable, committed, and compassionate participants in their communities.

- **Essential Communicators:** Students gain confidence and capability in communicating with a wide variety of people, and in a wide range of situations.

- **Socially, Emotionally, and Physically Thriving:** Students are resilient, proactive, and empowered to thrive because they have developed both self-confidence and empathy.

- **Culturally Disciplined:** Students have self-awareness of their own cultural context and build and maintain cross-cultural alliances.

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Public schools in Oakland have an ample, reliable supply of well-managed financial and human resources to meet their students' learning and life needs.

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Education represents one of the most critical variables in a child’s ability to be successful in life. Everything we do is in service of creating quality educational experiences for our students so they have all the resources they need to learn, grow, and thrive. Because great inequities exist in both life circumstance and educational outcomes for historically under-resourced students, we focus on supporting these students. Some of the things we will monitor to know if we are making progress, which are shared by OUSD as a part of their “Graduate Profile,” are:

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**Every student in Oakland graduates college, career, and community ready**

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The Oakland Public Education Fund centers its work around five core values.

<table>
<thead>
<tr>
<th>OUR VALUES</th>
<th>EQUITY</th>
<th>DATA-DRIVEN</th>
<th>IMPACT-DRIVEN</th>
<th>CHANGE-MAKING</th>
<th>STABLE &amp; SUSTAINABLE</th>
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<tbody>
<tr>
<td></td>
<td>We believe kids who come to school with less need more.</td>
<td>We use data and metrics to inform our work.</td>
<td>Our relationship with OUSD and all Oakland schools helps us focus on where we can have the greatest impact.</td>
<td>The Ed Fund strives to use its resources, knowledge, and networks to be a change-maker for students in Oakland.</td>
<td>A clear strategic vision guided by the Ed Fund’s mission and values supports organizational sustainability.</td>
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