BACKGROUND

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
- Robert 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

The Ed Fund has benefited from a significant fee-for-service revenue stream (fiscal sponsorships) in an under-served and growing market (charitable support for Oakland K-12 education). A more sustainable funding model would have a greater diversity of unrestricted revenue sources from individual donations and corporate giving.

Oakland Public Education Fund: Revenue by Source FY18

- Grants: $439,364
- Individual and Corporate Donations: $274,507
- Program Revenue (for A to Z Fund): $63,229
- Fiscal Sponsorship Fees: $63,229
- Revenue: Other (includes interest income and special events revenue): $348,520

Total Revenue: $1,635,027
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 FY16 to 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. Further analysis is needed to determine the net revenue contribution of the program to the overall organization.
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 2018 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.
THEORY OF CHANGE

We mobilize...

Volunteers

To enable them to...

Provide in-school support to classroom teachers and students

Invest substantially in ways and places that meet the greatest need

Attract, manage, and deploy funds with maximum efficiency

So 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

Because we are committed to ensuring that...

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

Supporting Activities

Developing relationships and making connections

Making the case for investing in Oakland students

Building consensus about needs and what works

Celebrating & promoting public schools and their teachers

Our Values

Equity

Data-Driven

Impact-Driven

Change-Making

Stable & Sustainable
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, and corporate sponsorship, to schools and students in Oakland. Lastly, increasing clarity around the design, objectives, and management of the “Supporting Activities” from the Ed Fund’s Theory of Change is critical to ensuring both mission impact and continued resource generation.

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**
- Complete the build out of the 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
AMPLIFY OAKLAND SCHOOL VOLUNTEERS

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
PROGRAM STRATEGIES

3 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: Supporting Activities programming and TechLink are well-resourced, effectively managed, and advance equity for Oakland students.

Tactics:

2020
- 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
## ORGANIZATIONAL STRATEGIES

### 4 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 75%
- Increase foundation giving by 20%
- Increase corporate giving by 100%
- Increase Fiscal Sponsorship fee revenue by 20%

**Tactics:**

<table>
<thead>
<tr>
<th>2020</th>
<th>2021</th>
<th>2022</th>
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<tbody>
<tr>
<td>Develop and implement an approach to market FSP</td>
<td>Formalize partnerships with 2-4 new corporate giving programs</td>
<td>Explore feasibility of FSP capacity building initiative and pitch to funders</td>
</tr>
<tr>
<td>Conduct research about, and outreach to, corporate giving programs</td>
<td>Conduct individual donor cultivation and asks</td>
<td>Analyze individual donor progress and make adjustments to approach</td>
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<tr>
<td>Develop individual donor cultivation plan with board</td>
<td>Conduct feasibility study for securing federal funding in partnership with OUSD</td>
<td>Analyze FSP revenue and make adjustments to funding model</td>
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<td>Identify 2-4 new foundation relationships to cultivate</td>
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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

- **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

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 and improve program design and implementation

Tactics:

- 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
NEXT STEPS: IMPLEMENTATION

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 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.