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<IMPORTANT Fiscal Vitality> New Intensive Assistance and Support Initiative with ACOE and Central Office Staffing Changes

1 message

Superintendent OUSD <superintendent@ousd.org>

Fri, Mar 22, 2019 at 5:24 PM

To: OUSD-Advisory <OUSD-Advisory-group@ousd.org>, OUSD-PRINCIPALS@ousd.org

Cc: OUSD-BOE@ousd.org

Dear Leaders,

As a part of the [Fiscal Vitality Plan](#) and ongoing work to address financial issues, OUSD is continuing to make necessary and strategic decisions around our fiscal health and sustainability. Namely, we are deepening our relationship with Alameda County Office of Education (ACOE) to begin an Intensive Assistance and Support Initiative. This collaboration will result in three significant and immediate changes:

- ACOE will work with the OUSD fiscal team to provide training and technical assistance.
- ACOE will increase support to our Chief Financial Officer who will help roll out the initiative.
- The reorganization of the OUSD Business Operations Team leadership structure including elimination of the Chief Business Officer role.

Today, ACOE Superintendent Karen Monroe joined me to introduce the Intensive Assistance and Support Initiative to the fiscal staff. The initiative involves ACOE deploying a team of experienced school fiscal professionals to collaborate directly with OUSD staff, to provide training, monitoring, and implementation of processes & protocols in the following areas of OUSD fiscal operations: budget, accounts payable, payroll and purchasing. The County team will engage in training and technical assistance with OUSD fiscal staff, as well as professional development in multiple areas through the end of the fiscal year (June 30, 2019). At that time, we will assess progress and determine ongoing collaboration. The initiative is set to begin immediately.

There are two immediate staffing transitions that are part of the initiative that I want to bring to your attention.

The first staffing transition is eliminating the Chief Business Officer position which is currently held by Marcus Battle. This decision is part of our central office redesign and enabled by the structure of the Intensive Support and Assistance Initiative. It is not related to any disagreement, performance or any matter relating to our accounting, strategy, management, operations, policies, regulatory matters, or practices (financial or otherwise). Marcus has had a tremendously positive impact on our fiscal and operations teams. We are deeply grateful for all of his hard work. His leadership has resulted in a more transparent and fiscally solvent District.

Some of his notable accomplishments are:

- Led successful transition to our new financial management system, Escape.
- Served as essential member of the OUSD bargaining team that led to the tentative agreement with Oakland Education Association.
- Initiated revenue generation ideas including recapturing attendance through Saturday School.
- Helped transform enrollment and budget processes allowing us to continuously improve our multi-year projections.

Please join me in wishing Marcus all the best in his future endeavors. Marcus' last day with OUSD will be April 5, 2019.

The second staffing transition is shifting some aspects of the role of the OUSD Chief Financial Officer, held by Ofelia Roxas, to include working closely with the County at their office and serving as a liaison with OUSD to ensure accurate and timely financial reporting. Through the end of the fiscal year, Ofelia will work with the intervention team to focus on the initial roll out of the Intensive Assistance and Support Initiative. All day to day management of the OUSD fiscal team will be held by the Senior Executive Director, Budget, Gina Murphy-Garrett.

ACOE and OUSD fiscal teams will be working closely together to implement this initiative and regular updates will be provided to staff and stakeholders. We are eager to roll it out and believe the initiative will bolster our efforts to strengthen OUSD's fiscal health and stability. Please share this information with your teams.

Respectfully,

Dr. Kyla Johnson-Trammell
Superintendent



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