



GLOBAL FAMILY ELEMENTARY SCHOOL SUSTAINABILITY PLAN

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Overview of Global Family Elementary School

Global Family Elementary School is a new small school in its first year of operation. The school shares space on the old Jefferson Elementary Campus in Fruitvale. Jefferson Elementary was split into two smaller schools last year, one of which is Global Family. Global Family currently operates kindergarten through third grade, while Jefferson still maintains the fourth and fifth grade classes. As each Jefferson class matriculates, Global Family takes on a new grade level of students. This year, Global Family has enrollment around 275 students, with a 15-teacher staff.

Global Family has launched a dual-immersion Spanish and English language program. The ideal model for dual-immersion instruction requires a student population made of 50% students that speak English as a first language and 50% that speak Spanish as a first language. A secondary dual-immersion model requires one third of the students speak Spanish, one-third speak English, and one-third are bilingual. Currently, about 95% of Global Family's students are Spanish speakers, while only 5% are English speakers. All members of the teaching staff speak both languages.

Strengths:

- Dual immersion program is a unique differentiator
- Science taught three times per week
- Experienced, high-quality teachers and principal
- High teacher-student ratio, emphasis on community
- Well funded arts programs
- Principal with decades of experience
- Bilingual teaching staff

Weaknesses:

- Lack of clarity in vision and the absence of prioritized goals
- No measurement of outcomes or metrics in use
- Lack of shared documentation and systems, no succession plan
- Little outreach to the community

Opportunities:

- Fresh start – no past history of school performance
- Dual immersion program, if successful, can be a valuable marketing and fund-raising tool
- Possibility of sharing resources with other dual-immersion schools in the area

Upcoming Challenges:

- Implementation of the student mix required for a successful dual-immersion language program is a challenge given the current student population and surrounding community population
- Developing comprehensive, targeted fundraising programs
- Risk of outgrowing facilities

Highest Priority Goals for Global Family School

The leadership team has three major aspirations for the school. Their objectives are to run a successful dual-language immersion program, for Global Family students to become global citizens with the cultural and technical knowledge to excel as 21st century citizens, and to promote a strong arts component within all of their teaching programs.

The three highest priority goals for the school's leadership to focus on over the next year are:

1. Establish a successful dual-immersion language program, from which graduating fifth-grade students emerge fluent in both English and Spanish, written and spoken.
2. Achieve API and AYP targets mandated by state and district, as well as achieving performance targets in assessments selected to measure dual-immersion effectiveness.
3. Create an environment where students and families are engaged and excited to learn about their multi-cultural, global community, as demonstrated by attendance rates, student and parent evaluations, and parent involvement in the school.

The biggest challenge in executing a successful dual-immersion program at Global Family School will be achieving the balance in Spanish speaking, English speaking, and bilingual students that such a program requires. The school cannot accurately brand itself as a true dual-immersion without the appropriate student blend. Current enrollment is heavily Spanish-speaking students. Recruiting English-speaking and bilingual students poses several problems.

The first issue is where Global Family can find an English-speaking student population to recruit into the school. The surrounding neighborhoods have a very small English-speaking population. Though Global Family can market itself as the only dual-immersion school in the area, which may give it an edge with some families, English-speaking students attending schools with successful track records and higher state assessment scores are unlikely to relocate to an unproven school. Global Family may find some success recruiting English-speaking students from struggling schools in West Oakland. To compete with the West Oakland and other East Oakland schools serving this student population, the school must achieve the highest performance scores it can in the coming years. If this recruiting strategy does succeed, Global Family will have to provide transportation for students from other neighborhoods and manage a busing system.

Additionally, if Global Family is successful in its recruiting efforts and can add English speakers to its student roster, it must consider the local student population that will be displaced. Incoming English speakers will be taking seats from the younger children that Global Family, and Jefferson Elementary, may have served in previous years. This unintentional effect of the dual-immersion program should be considered in the evaluation of the school's service to its larger community.

In order to continue the dual-immersion effort in good faith, Global Family's Leadership Team must see significant movement towards its enrollment goals and positive measures of the impact of the dual-immersion program in the next two to three years. Marketing the school as a dual-immersion past this point would be misleading. Two to three years is also the window of time Global Family has to experiment with a program that may or may not get results before it risks its reputation as a school that adequately serves its students.

Principal Sarah and her Leadership Team must select metrics that best measure the results of the dual-immersion before beginning Global Family's second year of operation. A successful dual-immersion program may provide many benefits to students and families, and differentiate the school from other schools in the area. However, a handful of other local schools have opened with a dual-immersion goal and failed, then closing or moving onto a new model. Successful, true dual-immersions are extremely difficult to find. The dedication of the staff may

produce better results for Global Family, but it is important that the Leadership Team has enough perspective to be able to recognize whether the program is serving students, and when it should be scrapped. The program should be evaluated regularly, and not continued if not meeting expectations past the 2010-11 academic year.

RESOURCES DEVELOPMENT

Fundraising

Global Family is currently pursuing very little in the way of systematic fundraising. Principal Sarah has applied for some grants on an ad-hoc basis, with the help of outside consultants or volunteers. OSSF is on retainer to prospect, research, and write grants and provides leadership in this area. Grants have been obtained for some specific school programs, like art lessons.

At this point, there is almost no fundraising effort targeted at corporate or individual donors, largely because the school has not yet been able to invest the time needed to reach out to the wider community or create the tools needed to target donors. There have been no fundraising events, or mailings requesting donations.

If successful, Global Family's distinct program (dual-immersion instruction with a focus on 21st century skills) can be marketed as a significant differentiator that can be leveraged in a fundraising program. This is one of the areas where OSSF's knowledge of fundraising strategy and grant writing can make a big difference for Global Family. OSSF can also assist with grant applications and the construction of tools like a school website.

Next Steps:

1. With the help of OSSF, a sub-committee of the Leadership Team can flesh out marketing plan that presents Global Family as a school ideally suited for developing 21st century skills in children (see Marketing portion of sustainability plan). The plan should emphasize the dual-immersion program, the performing arts programs, and the science curriculum.
2. Once the marketing plan is in place, work with OSSF to develop fundraising materials, including a website and a mailing on the school targeted at donors.
3. Develop a mailing list, starting with contacts of Principal Sarah and the contacts of the Leadership Team. The mailing list should include contact information for hard-copy mailings and electronic mailings to drive traffic to the Global Family website.

Next Year and Beyond:

Global Family should launch a giving campaign by Fall 2008 with the help of OSSF. The Leadership Team and OSSF will partner to develop a comprehensive fundraising plan. The plan should include potential grants, individual giving through mailings and events, and other fundraising efforts like T-shirt and coupon book sales. An essential part of the plan is specific fundraising targets for programs projected for the next two to three years.

The Leadership Team can create sub committee of leadership team to focus on organizing fundraising events (the events should be coordinated to simultaneously build awareness of Global Family in the outside community). Recurring annual themed events can build brand recognition for the school and simplify planning for coordinators who are able to fine tune the arrangements for the event with each passing year.

Staff Resources

Global Family boasts a staff of experienced, high quality teachers, including two credentialed floating teachers to assist with arts programs. Principal Sarah has invested heavily in this area. The current teaching staff is motivated to build a strong school and there is broad agreement that developing Global Family into a successful dual immersion program is a high-priority goal. While

Global Family has retained a part-time dual-immersion/bilingual teaching consultant, there is not a full-time staff member who is responsible for managing the dual-immersion curriculum and providing consistent support in this area.

Since the school is in its first year, Principal Sarah has not yet been required to replace teachers or hire new teachers due to turnover. As the school adds the fourth and fifth grade, new teachers will be needed. There is not a specific recruiting plan in place to fill open teaching positions, nor have recruiting materials been designed to attract teacher candidates.

The teachers at Global Family have regular preparation time each week. Teachers at each grade level meet for planning time together, but coordination and collaboration between teachers across the grade levels should be strengthened. Global Family's leadership team, which includes top teachers from all grade levels, is now starting to meet regularly.

Principal Sarah observes teaching in all classrooms frequently, on a regular basis. She leaves the teachers written feedback after each classroom visit, but data-driven evaluation tools are not currently used with the teachers.

Teachers are encouraged to attend conferences and trainings, and Global Family has been able to fund participation in some of these programs. Additionally, the formation of the Leadership Team has recently presented new opportunities for teachers to take on some management responsibilities.

Next Steps:

1. The Leadership Team should form sub-committees, specifically groups are needed to assist with student recruiting, new teacher recruiting, fundraising, and community outreach. Principal Sarah should also delegate some budgeting responsibilities to interested members of the Leadership Team. This could help make the parts of Global Family's management that are currently impacted by Principal Sarah's heavy workload more efficient, and will provide opportunities for high achieving teachers to acquire new skills.
2. Require teachers to begin meeting across grade levels in order to facilitate the coordination of complimentary expectations for student performance at each grade level.
3. Develop a brochure for new teacher recruitment, and a corresponding section of the Global Family website. Begin posting opportunities with organizations like Teach For America and Resources for Indispensable Schools and Educators, and on sites like Edjoin.org.

Next Year and Beyond:

Since the success of the dual-immersion program is top priority, Global Family should work to create a full-time role that would enable an assistant principal or staff member to manage the dual-immersion curriculum. This person could assist with teacher development while also tackling student performance problems and troubleshooting for problem areas like new students coming in at higher grade levels who lack the language skills needed for the dual-immersion curriculum.

In the next few years, Principal Sarah should also develop one or two members of the Leadership team as potential successors. This is critical because the school's operations are currently heavily dependent on her and would be severely impacted if she were to leave. There is currently no succession plan in place for turnover in the school's leadership.

Family Resources

Many of the parents of students attending Global Family are recent immigrants from Central and Latin America. Few of the Global Family parents speak fluent English. The school does not have

a systematic plan for harnessing the support of its parent community, but is working hard to build relationships with parents, make them feel comfortable at the school, and encourage their positive involvement in the school and their children's education. This effort includes raffles and games to promote parent involvement in school activities and onsite English classes for parents of Global Family students. In addition, a few of the teachers are adept at organizing and utilizing parent volunteers in their classrooms and have developed excellent relationships with parents.

Jefferson Elementary had a Family Resource Center in place, but Global Family has not been able to keep one operating for lack of space. The former Family Resource Center was converted into a classroom.

Next Steps:

1. Global Family must find space to restore the Family Resource Center.
2. Teachers can collaborate in a series of focused meetings to determine three to four best practices for parent involvement and volunteering at Global Family, with the goal of establishing consistent parent involvement across grades and classrooms.
3. An End of the Year report should be presented to parents and families at the close of the year, including updates on achievements and coming goals for the school.

Next Year and Beyond:

The best Family Resource Center for Global Family would include a full-time staff member who is bilingual, and computers available for parent use. Small improvements can be made each year in pursuit of this ideal.

A committee of teachers who excel at developing relationships with parents can work together with Principal Sarah to organize a formal Parent Leadership Team. If possible, highly involved and motivated parents can also assist with the work of this committee. Specific objectives for the committee include achieving 100% turn out for parent-teacher conferences.

Engagement of English-speaking parents has been particularly low, and the Leadership Team should discuss actions to target and engage this demographic. Anne Ginnold, the school's bilingual consultant, might be the ideal person to lead this effort.

Global Family's biggest goal in working with its parent community is to educate immigrant parents about the local school system and make them feel comfortable in the school. To this end, Global Family's leadership should speak Spanish in order to communicate with parents without the help of a translator. Bilingual leadership is also an important symbolic reflection of the school's values.

Community Partnerships

In its first year, Global Family has not focused many resources on community outreach and people in the neighborhood are not familiar with the school. There has been some success acquiring grants for arts programs with community artists. Relationships with outside organizations and businesses, will be essential to developing a solid fundraising platform and accomplishing the school's goals.

Next Steps:

1. The Leadership Team can brainstorm and list potential community partners that might be able to assist the school reaching its current objectives. For instance, a local hardware store might be willing to donate paint and supplies for an office renovation; OSSF can provide support in grant writing and fundraising; The Edible Schoolyard might assist with renovating the garden area of the playground; other Bay Area dual-immersion schools might share research and

best practices. Be sure to find and list contact information for each potential partner.

2. Mail Global Family marketing materials (a brochure and letter, including the URL for the school's website) to each potential partner on the list.
3. Split the potential partner list up among the members of the Leadership Team for follow-up by phone. In-person visits are ideal, but may not be possible due to teacher's schedules. Follow-ups can focus on simply making connections, or seeking areas for collaboration.

Next Year and Beyond:

As Global Family refines this strategic plan and its goals for the next three to five years, the Leadership Team should simultaneously develop partnerships that can enable the school to achieve each goal. Strategic partners can assist with both funding and know-how. As many staff members, parents, and school leaders should be involved in developing partnerships as is possible.

The school should aim for two to four mailings to potential strategic partners per year. Partnerships can take years to build. As more partners become involved in the school, they should be included in formal Global Family Community Meetings to give input on the strategic plan and direction of the school.

OPERATIONS

Financial Management

There are no concrete, specific projections for Global Family's budgetary needs. This is to be expected due to the lag time in budget updates from the school district. In addition, school is still in its infancy, gaining grade levels and students, and does not have the luxury of a track record to base its budgetary requirements on. Global Family is now working to define the different academic and extracurricular programs it will offer. Sensible estimates of budgetary requirements for coming years can only be made when these programs have been adequately defined.

Financial management and Results Based Budgeting at Global Family is primarily performed by Principal Sarah, with the help of a school district consultant. Over the past year, the consultant has started working with more schools and her time has been stretched thin.

Next Steps:

1. Principal Sarah sets specific fundraising goals based on projects to be completed at Global Family within the next two years. These goals will be used as objectives for fundraising events, mailings, and discussed with potential partners.
2. Principal Sarah should take steps to formalize her budgeting process with standardized internal planning activities and deadlines for each step.
3. Develop one or two interested members of the Leadership Team to share in the budgetary responsibilities along with Principal Sarah. Include them in meetings with the district budgeting consultant.

Next Year and Beyond:

Once fundraising targets are in place, the school can move to set up fundraising events to achieve those targets. Each event should also have a target, to allow organizers to measure their effectiveness. Several fundraisers per year is ideal and events like school performances can be re-worked to include a fundraising component.

The end goal of formalizing Principal Sarah's budgeting work is to achieve a process that can easily be taught and delegated to new staff members. This should be a high-priority objective in the next two to three years. Budgeting, including Results Based Budgeting and the management of funds raised from outside sources, will become an automated process that is accessible to all staff.

It is imperative that Global Family continue to set aside money each year for a district Operations Support Coach. In addition, budgets should be designed with 10% budget cuts in mind. This will allow the school some buffer to operate in the uncertain funding climate ahead.

Data Management

Global Family currently has no data management system in place, few records, and almost nothing recorded in an easily transferable and digestible manner. This presents difficulties specifically in the areas of budgeting, planning, and using appropriate metrics to evaluate student performance.

While data management will become increasingly important for marketing and community outreach purposes, this is a secondary priority for the school. This is an area to revisit and develop in the coming years.

Plan for benchmarks be ready to Assess scores, breaking them down, measure their standards against CST. Use Your Voice survey results reviewed as a team.

Infrastructure Development

Principal Sarah is heavily involved in day-to-day operations of Global Family School, but is beginning to delegate more and more management responsibilities to administrative staff, interested teachers, and outside consultants. The school has a Leadership Team in place, and the team is able to meet sporadically.

The school leadership and staff are united in their dedication to the success of the dual-immersion program at Global Family. However, the structures and culture of the school cannot be aligned with this vision until the appropriate student population ratios have been achieved (one-third Spanish speaking, one-third English speaking, and one-third bilingual). There are also some stakeholders who are not yet up to speed with the dual-immersion model—for example, school district officers in charge of student placement.

Global Family currently has about 275 students in grades K-3. In the next two years, the school will add the fourth and fifth grades and need to accommodate about 360 total students. This projection is based on current class sizes. As Jefferson students cycle out, Global Family will take over Jefferson classrooms on the existing campus. Portable units are also available. Current facilities are unlikely to be adequate for the projected number of students, and additional space is needed for a Family Resource Center.

Next Steps:

1. Review this sustainability plan at a Leadership Team meeting for feedback, improvements and approval.
2. The Leadership Team should discuss and come to an agreement about how to evaluate and manage Global Family's dual-immersion platform as it evolves over the coming years. Most importantly, the Leadership Team must agree on a strict timeline for achieving a successful dual-immersion program, and alternatives should the program fail.
3. The Leadership Team must meet on a regular basis, at least once per month, to assess the school's progress in working towards the goals outlined in the sustainability plan, and take corrective actions as needed. The Leadership Team should receive updates on achievements made in sub-committees (see Staff Resources Next Steps, above).

Next Year and Beyond:

In the next two to three years, the Leadership Team must be stringent in its evaluation of whether or not the dual-immersion program is succeeding. The Team should stick to

objective measures of performance that it's members can identify and agree to now. Student population targets are a critical goal, as the Global Family cannot be marketed as providing dual-immersion education if it does not meet this criteria. To ignore the discrepancy for more than three years would call into question the school's integrity and threaten the Global Family brand.

The Leadership Team can refine its subcommittees over the next few years to effectively develop systems and policies for the school, help in managing existing organizational relationships, and carry the brunt of responsibility for managing the budget. As the Leadership Team takes on the execution of the evolving strategic plan, the principal will be able to focus more time on leadership, fundraising, and new partner development, as well as succession planning to ensure continuity.

MARKETING

Marketing to Families

The school currently has no formal marketing plan focused on attracting and recruiting new students and families. The Leadership Team has identified this as a key area for development, specifically because of the enrollment demands of the dual-immersion program. Global Family now has a general informational pamphlet about the school, and a basic web page hosted by the OSSF website.

Global Family participates in the school district's Options Fair and has participated in some events targeting pre-school families to recruit incoming kindergarteners. While current Global Family parents are not heavily involved in recruiting, it may not make sense to focus energies on bringing them into the effort at this time. In order to make the dual-immersion program a success, Global Family must focus on recruiting students that speak English as a first language. Nearly all of Global Family's current parents are Spanish speakers.

The school's leadership must increase efforts to reach out to pre-schools and day-care providers to engage the parents of potential students. They may be able to attract English-speaking students from less successful schools in the area. It is highly unlikely that Global Family would be able to attract students from better performing schools without first establishing a track record of demonstrated success.

First impressions count. A critical, potentially overlooked, marketing tool for communicating the strength of the school to current and potential families is the appearance of the school's office and schoolyard. Global Family faces the risk of being perceived as a "second-hand" school because of its shared facilities handed down from Jefferson Elementary. The schoolyard is in need of new asphalt and landscaping, and the play structures are old, unappealing, and might appear unsafe to some parents.

Next Steps:

1. The existing marketing materials must be fine tuned and adapted into separate tools that specifically target families in the demographic Global Family wishes to bring into the school. Tools like a brochure, parent letter, and portion of the website for both current and potential parents should be designed. All materials must have Spanish and English versions. All materials must be ready before the next Options Fair.
2. Simple, superficial improvements to the office could be made during a community work day. Cleaning, new paint, inviting seating, and attractive displays of student artwork could increase the professional atmosphere of the office.
3. Improvements to the schoolyard, including repaving and new play structures, are currently slated for summer of 2009. Principal Sarah and the Leadership Team should seek opportunities and funding to advance this schedule as much as possible (some companies offer a range of play structures for lease, with no

need for a down-payment). Other small improvements, like gardening and painting the walls around the play yard, could result in quick results.

Next Year and Beyond:

The next few academic years will be a crunch time in terms of recruiting and getting the dual-immersion program off the ground. As Global Family makes progress in recruiting the appropriate student mix, they can develop a formalized recruiting plan and begin to involve current parents in recruiting efforts. Long term goals can include building online presence on third-party websites evaluating school quality, hosting open houses, and seeking out public relations opportunities.

In order to achieve all of its marketing and recruiting goals, Global Family must focus on attaining high performance above all. Families from diverse backgrounds must feel Global Family provides a quality education.

Marketing to the Funding Community

There is no marketing plan in place for the school. At this time Principal Sarah takes full responsibility for marketing efforts, primarily working through her personal network. As mentioned above, a general brochure and basic website exist, but these tools are not tailored for fundraising purposes. Global Family has not yet held or planned fundraising events for the school.

Next Steps:

1. The existing marketing materials must be fine tuned and adapted into separate tools that specifically target potential donors—both individual givers and corporations. A polished brochure, ask letter, and expanded website including pages promoting upcoming events, results, and reasons to donate to Global Family should be designed. All materials must have Spanish and English versions. OSSF can design and produce these materials.
2. Principal Sarah should lead conversations about funding needs and fundraising results at upcoming Leadership Team meetings. These conversations can begin as soon as Principal Sarah has some basic fundraising targets in place.
3. A sub-committee of the Leadership Team should start planning a fundraising event for the opening of the 2008-09 school year. Parents, prospective students and their families, partners, community members, and partners should be included in the event.

Next Year and Beyond:

The school should have a well defined marketing plan for reaching potential donors. A sub-committee of the Leadership Team should be involved in all marketing efforts. Efforts should include a regular newsletter and e-newsletter, and consistent, branded marketing materials (t-shirts, website, printed materials) that are updated annually.

Global Family will eventually need a website that includes information for different audiences. Appropriate URLs like www.globalfamilyschool.com and www.globalfamilyelementary.com are currently available, and should be reserved to feed into the school's site. OSSF can provide all the web resources that the school needs to build a more complete online community.

Global Family's long-term fundraising goal should include hosting several fundraising events per year. As the staff gains expertise at planning and executing these events, they should begin to incorporate a public relations element. Events will have multiple objectives—promoting the school to potential students, raising awareness for the work and achievements of the school in the outside community, and also raising funds.

Community Relations

In its first year, Global Family has focused on building essential systems and infrastructure and not yet had a chance to reach out to the community and engage partners in an organized fashion. Many residents and business owners in the surrounding Fruitvale area are not familiar with the school.

Next Steps:

1. Participate in Fruitvale's annual community fairs, including the Cinco de Mayo Parade and Dia De Los Muertos Festival, with a Global Family booth or other recognizable presence.
2. Improve the building's signage. Global Family School is difficult to find or recognize for those who have not previously visited. The campus still appears to outsiders as the old Jefferson School.
3. Teachers should coordinate classroom field trips to visit local businesses and organizations. Field trips are educational opportunities and also provide students a chance to interact and build relationships with community members.

Next Year and Beyond:

As the school becomes known in the community, Principal Sarah and the Leadership Team will also be working to build strategic partnerships that align with the school's goals. Partners, once invited into the school, can provide new perspectives, metrics, and data that will assist with the development of the school's strategic plan and assessment of whether Global Family is effective in achieving its goals.

Internal Marketing

Global Family's staff fully supports the dual-immersion strategy and is committed to making the program successful. The school is now developing concrete measures to evaluate the results of the dual-immersion instruction.

There is a high level of animosity felt by Global Family team toward the school district management and leadership. Bad feelings, while understandable due to historic struggles with changing district policies, are likely contributing to weak marketing to school district representatives about the school's unique culture, programs, and the strengths of the dual-immersion program. In particular, this poses a problem with the student assignment office. The office doesn't seem to have a clear understanding of the school's specialties and needs and continues to send students who are not a match for the dual-immersion curriculum.

Next Steps:

1. The Leadership Team must select and agree on assessments that align with the school's dual-immersion strategy as soon as possible. Anne Ginnold can provide a range of options for metrics, background information, and examples of the trials of other local dual-immersion elementary programs as a foundation for this conversation.
2. Principal Sarah should renew efforts to build the relationship with the student assignment office. The Leadership Team or individual teachers can follow up with the student assignment office by sending grade-level specific information and materials that illustrate the day-to-day execution of the dual-immersion strategy.

Next Year and Beyond:

Communication should target all office employees, rather than only the office leadership. The office should receive Global Family's marketing materials as soon as they are available. If the school is to achieve necessary student ratios, the student assignment

office must become a key supporter of the school and the dual-immersion program. The relationship must be maintained from year to year, regardless of staff turnover at Global Family or in the student assignment office. For this reason, many individuals from the Global Family staff should be included in the development of this relationship.