**Advancing and Sustaining the Oceanside Promise: A Collective Impact Initiative Anchored Within Oceanside Unified School District**

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Advancing and Sustaining the Oceanside Promise:
A Collective Impact Initiative Anchored within Oceanside Unified School District

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
Nicole Y. Magnuson

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership.

May 2017
DEDICATIONS

To the three precious men in my life: Jon, Keaton, and Kyler
Thank you for joining and supporting me on this journey. You made
me laugh when I was too serious, believed in me when I didn’t believe
in myself, and motivated me to give my best every step of the way.

To my female role models: Mom and Shel
Thank you for teaching me that hard work and persistence pays off and that even the
most ambitious dreams are within reach. You’ve always believed in me and supported
me as I followed my heart to Phoenix, San Diego, Boston, and back. I am blessed.

To my friends for life: Roxanne, Sherri, and Mary
I have been gifted with friends who have stood by me through thick and thin. Sherri Pleva,
not a day goes by that I don’t wish to see your face again, but have felt your peaceful
presence with me throughout my Harvard journey. Roxanne Garramone Ibrahim, we grew
up together and we will grow old together with grace and style. Mary Currigan, you inspire
me, challenge me, and make me better in life and this education work we both love.
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Paul Reville, the Harvard Graduate School of Education’s Francis Keppel Professor of Practice of Educational Policy and Administration, my academic advisor, and the chair of my capstone committee, for your wisdom and calming guidance throughout the program and in my residency, always reminding me to “focus on the work” and the capstone will come.

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**ABSTRACT**

In addition to preparing students academically, public schools are increasingly expected to address the complex social, emotional, and safety needs of students. Collective impact, first defined by Kania & Kramer (2011) as “a commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem” has emerged as a framework for bringing cross-sector partners together to share ownership of student success (p. 36). Its data-informed, continuous improvement orientation drives collective action to address root-cause issues and to achieve large-scale social impact.

This capstone documents the leadership and support I provided to Oceanside Unified School District (OUSD) and its community partners to advance and plan for the long-term sustainability of the Oceanside Promise (The Promise), a collective impact initiative anchored within OUSD. FSG’s Five Conditions of Collective Impact and StriveTogether’s Cradle to Career Theory of Action were used to assess the current state of the partnership, its backbone capacity, and the development of a multiyear strategic roadmap. My strategic project involved working with district leadership, the Oceanside Promise Foundation (The Foundation), and The Promise partners to clarify roles and direction, create coherence, and facilitate shared ownership of The Promise and its long-term sustainability. In addition to my professional and academic experience, literature regarding collective impact, critical leadership competencies, and organizational and community coherence informed the strategic project’s planning and execution.

This capstone also provides insight into the challenges and opportunities of a district-anchored collective impact initiative. Most notably, it explores how shared community ownership must be intentionally cultivated and how collective impact challenges the mindsets and competencies of educators and community members with a traditional
view of how school districts and community partner. Thus, the implications for site and sector sections elevate the conditions that would better support the success of innovative school districts assuming the role of backbone support in collective impact initiatives.
INTRODUCTION

The people who are crazy enough to think they can change the world are the ones who do.

~Steve Jobs, Apple

Early in my professional career, I discovered that hard work coupled with passion and persistence leads to challenging and rewarding career opportunities. I have been blessed to work with a variety of dynamic people in efforts to address critical social issues with respect to education, poverty, and equity. Many of my past and present colleagues believed the impossible was possible and were deeply motivated to attack the most wicked problems that affect the social, academic, and economic success of the most underserved communities (Camillus, 2008). It is this personal and professional grounding that guided me to Oceanside, California and the Oceanside Unified School District (OUSD), a school district led by a home-grown superintendent with a bold vision, a big heart, and the humility to know that what he hopes for Oceanside’s kids and families requires the coordination and support of an entire community.

My residency placement with OUSD was ideal as it allowed me to contribute my professional experience in strategic planning, social change, resource development, and communications within a public PreK-12 education system. By sharing the knowledge and expertise I cultivated working in nonprofits, philanthropy, and consulting related to P-20 education and health and human service issues, I also helped expand the knowledge and capacity of my district and community colleagues. Although my skills and experience often provided an alternate approach or perspective, the environment was welcoming and open to debate, discussion, and shared learning. Working within a school district also provided
valuable personal insight into the complexity of affecting change within a unified education system with nearly 18,500 racially and economically diverse students (OUSD, 2016a).

This capstone examines my leadership in Oceanside Unified School District’s efforts to inspire and unite the Oceanside community around a shared vision for ensuring the social, emotional, and academic success of every child from cradle to career. Under the leadership of Dr. Duane Coleman, OUSD’s superintendent, the Oceanside Promise (The Promise) was launched to galvanize internal and external stakeholders to improve educational outcomes and to address the more complex social conditions affecting the social and emotional well-being and safety of Oceanside’s children, youth, and families. The Promise is a community-wide partnership including education, business, government, faith-based, and nonprofit individuals and organizations. Launched as a collective impact initiative, The Promise seeks to use the discipline of data-informed continuous improvement practices to better align community resources and to achieve long-term cradle to career social impact. Collective impact, as defined by Kania & Kramer (2011), is “the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem” (p. 36).

With Dr. Coleman as the spark behind The Promise, OUSD has assumed an unusual role by providing the backbone support to the collective impact partnership. Backbone support, one of the “Five Conditions of a Collective Impact” (Table 1), is generally provided by an organization external to the school district such as a United Way, a foundation, or other institution that is perceived to be “neutral” and having the ability to facilitate without dictating a specific direction (Hanleybrown, Kania, & Kramer, 2012; StriveTogether, 2011). A school district-anchored backbone is not prevalent in descriptions of backbone types in most collective impact literature. Leaders of FSG and StriveTogether, two of the leading
consultancies and practitioners of collective impact, could not readily identify another community within their networks where the backbone was anchored by a public education system and elevated concerns about the ability of a school district to take on such a role with the required neutrality, especially long term (J. Edmondson, personal communication, August 3, 2016; F. Hanleybrown, personal communication, October, 20, 2016).

Table 1: FSG’s Five conditions of Collective Impact

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<tr>
<td><strong>Common Agenda</strong></td>
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<td>All participants have a common agenda for change including a shared understanding of the problem and a joint approach to solving it through agreed upon actions.</td>
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<tr>
<td><strong>Shared Measurement</strong></td>
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<td>Collecting data and measuring results consistently across all the participants ensures shared measurement for alignment and accountability.</td>
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<td><strong>Mutually Reinforcing Activities</strong></td>
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<td>A plan of action outlines and coordinates mutually reinforcing activities for each participant.</td>
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<td><strong>Continuous Communication</strong></td>
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<tr>
<td>Open and continuous communication is needed across the many players to build trust, assure mutual objectives, and create common motivation.</td>
</tr>
<tr>
<td><strong>Backbone Support</strong></td>
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<td>A backbone organization(s) with staff and specific set of skills serves the entire initiative and coordinates participating organizations and agencies.</td>
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Source: Hanleybrown, Kania, & Kramer, 2012

Although there are many variations in the formation of collective impact backbones, because they emerge based on the availability of resources, the needs of each community, and the trust of the convening partners, there is commonality in function. In fact, the knowledge, skills, and competencies of a backbone leader and the support structure are defined and substantiated by decades of research involving coalitions and collective impact initiatives in the education and health and human service sectors. Assuming the backbone support remains within the school district for an extended timespan, those capacities and
competencies, along with intentional collaborative structures, need to be cultivated within the district-anchored backbone staff and The Promise partners. The rare placement of the backbone within the district and the resulting capacity-building will assuredly place pressure on the internal education system to align and improve in ways that may not have been previously achieved—or achieved only after years of cross-sector collaboration—in other communities engaged in cradle to career collective impact initiatives.

**OUSD and Oceanside, California: A School District and Coastal Community with Heart and Grit**

Oceanside Unified School District (OUSD) is located 45 minutes north of San Diego in Oceanside, California. Established in 1888, Oceanside is one of fourteen cities that make up North County San Diego. The coastal community has nearly 176,000 residents, of which more than 42,000 are children under the age of 18 (U.S. Census, 2016). Census data shows that Oceanside has fewer adults (ages 25 and older) with bachelor’s degrees, a higher percentage of households living in poverty, and more residences with a language other than English spoken in the home than the county overall. The school district serves nearly 18,500 students across its 23 elementary, middle, and high school campuses. Students of color are the majority (76%), with Latino students representing the largest racial/ethnic group (58%). Seven out of ten OUSD students are economically disadvantaged (OUSD, 2016b). Compared to its closest North County unified school district neighbors—Carlsbad, San Marcos, and Vista—OUSD has the highest percentage of economically disadvantaged students (CDE, 2016).

Although the district has made gains over the last academic year, its students’ academic performance is far below standard in English Language Arts (ELA) and mathematics. Per the California Department of Education (CDE), 32% of OUSD’s third
grade students were proficient in English Language Arts on the state’s academic assessment in 2015/2016, compared to 43% in the state and 51% in the county. The disparities widen across lines of race and class as Latino and Black students lag behind their white counterparts by up to 24% and economically disadvantaged students trail the overall OUSD student population by nearly 10%. With respect to eighth grade mathematics, 37% of OUSD students were proficient, compared to 36% in the state and 40% in the county.

Camp Pendleton, one of the largest Marine bases in the United States with more than 42,000 active duty personnel (U.S. Marine Corps, 2017), is within OUSD’s boundaries. The district has three K-8 sites on the base, serving a highly mobile military-connected student population with unique social, emotional, and academic challenges due to parental deployments, frequent moves, and constant transition between education systems (Ruff & Keim, 2014). The military presence initially contributed to the gritty image that Oceanside’s community leaders and residents continue to battle as it fostered the development of bars, liquor stores, and other night life—something that is still present, but less of a negative factor with a more fully developed base, increased family living, and ongoing restaurant, retail, and hospitality development.

Oceanside resembles other American communities with its pockets of racial and economic segregation. Rothstein (2014), author of The Making of Ferguson, argues that, “although policies to impose segregation are no longer in place, and seemingly have been reformed, their effect endures and cast a long shadow” (p. 6). Consequently, communities like Oceanside have multicultural and multilingual richness, but end up with neighborhoods of similar people living together and sending their children to schools that lack significant diversity. “The result is people of color and whites living in communities with their own racial groups, both culturally and economically segregated” (Tatum, 1997, p. 13).
In addition, a history and reputation of gang presence and violence continues to plague the Oceanside community. The Oceanside Police Department (OPD) has documented 14 gangs within the city’s boundaries. In 2016, there were 19 gang-motivated crimes, a 37% decrease from the previous year. During the first six months of my residency, there was a gang-related death involving a 15-year old girl, which was followed by several gang-involved shootings. Widespread fear in the rival gang neighborhoods resulted in cancelled after-school programming, enforced curfews, and increased police patrol. The children and families in these same neighborhoods are up to seven times more likely to be exposed to violent crime than their peers in the more affluent or less gang-involved areas of Oceanside (OPD, 2017). The schools in these stressed neighborhoods have the highest poverty rates and lowest third-grade literacy rates within the district (U.S. Census, 2016; OUSD, 2016b). These safety and academic struggles have contributed to OUSD’s declining enrollment of nearly 1,400 students over the last five years and a loss of $14 million in its average daily attendance allowance. The district lost 500 students leading into the 2016/2017 academic year, contributing to a projected deficit of more than $17 million over the next three years (OUSD, 2016c).

Consequently, community organizing groups such as Save Our Streets and city programs at community resource centers fight to keep Oceanside’s kids safe and out of trouble. At the same time, economic development and gentrification is also taking place with new hotels, micro-breweries, and upscale housing cropping up along the coastline. Although this economic transformation is positive, it brings mostly low-wage, low-skill jobs to the city and raises rental and housing costs, perpetuating poverty and driving families into shared housing or out of the community. Despite these difficulties facing the community, Dr. Coleman told me early on, “Once you know Oceanside—the good and the bad—you can’t
help but love Oceanside and its students.” It’s this complexity of heart and grit that led to the Oceanside Promise.

**A Bold Vision for Oceanside’s Children, Youth, and Families**

The idea of the Oceanside Promise was launched in mid-2014 as Dr. Coleman took the helm of OUSD. As a product of OUSD’s education system and its former associate superintendent of education, Dr. Coleman had a unique perspective on the district and the community. He grew up in one of Oceanside’s toughest neighborhoods that was known for poverty and gangs. Thus, the aspiration of The Promise meeting the social, emotional, and academic needs of every Oceanside student was both personal and urgent for him, especially as it related to the community’s most at-risk children and families. With the success of The Promise, he envisioned community leaders and organizations working together to ensure a stronger system of wraparound services to support the safety, health, and overall well-being of all students and families, a quality education system that prepared every student for success in college and career, and an economically thriving community with a multitude of job opportunities that afforded its residents a high quality of life. Ultimately, The Promise would contribute to the social and economic vitality of Oceanside.

Consequently, Dr. Coleman spent his first year as superintendent communicating his bold vision to ensure every student graduated from OUSD’s high schools ready to succeed in college, career, and life. It was during that time that he was introduced to the collective impact framework and began laying the foundation for The Promise by identifying district resources to start the process. He solicited and secured board support to hire a consultant with experience in collective impact in City Heights, an impoverished neighborhood in San Diego. He also re-assigned three staff to work on The Promise part-time, and thus, initiated some backbone capacity to bring people together around his vision and the creation of a
common agenda for school-system and community change. He simultaneously initiated the creation of the Oceanside Promise Foundation (The Foundation), a nonprofit organization, with the purpose of raising resources for the backbone capacity of The Promise and scholarships for OUSD’s most under-resourced students.

Throughout 2014/2015, The Promise team and Dr. Coleman met with community leaders and partners to communicate their vision for Oceanside’s students, explain the collective impact approach, and solicit personal and organizational involvement. The Leadership Table, a mix of cross-sector leaders, was recruited, a common agenda established (Exhibit 1), and three Collaborative Action Networks (CANS) were launched to initiate collaboration in kindergarten readiness, college and career readiness, and the use of data to inform priorities and decision making. The partners, the agenda, and collaborative work was emerging by mid-2015, in line with the adopted StriveTogether collective impact framework, which was being used by more than 60 partnerships across 32 states (StriveTogether, 2017).

*From Supporting to Co-Leading in Collective Impact*

Significant changes started to occur within the first two weeks of my residency. The retained consultant, the only person with practical collective impact experience, took on a limited and rapidly decreasing advisory role. There was turnover of key staff and new leadership was put in place. Dr. Coleman identified Vicki Gravlin, one of OUSD’s most innovative principals and a seasoned educator, to work with me to move The Promise forward. Her newly created position, director of community engagement and innovation, was to support The Promise while advancing innovation within OUSD. Although a proven
educational leader, Vicki admittedly had no experience in collective impact or community-based collaboration, and acknowledged the steep learning curve ahead for her and the remaining Promise team. We both recognized that we brought unique and complementary skills and expertise to The Promise. At that moment, my role as resident went from supporting the advancement of the Oceanside Promise to leading and co-leading its continued development and planning for its sustainability. With The Promise’s backbone support anchored in the school district and its long-term sustainability dependent upon The Foundation, I led strategy work across all three entities (i.e., OUSD, The Foundation, and The Promise). Our goal was to bring clarity in purpose and direction to each, greater coherence to their collective work, and set the stage for shared ownership and accountability to achieving their collective vision of graduates ready for college, career, and life.
The long history of efforts to improve student academic achievement and to eliminate persistent achievement gaps spans centuries for the former and decades for the latter (Graham, 2005). The diversity of factors ranging from hunger to homelessness and domestic violence to mental illness—which impact the social, emotional, and academic success of our nation’s most at-risk children, youth, and families—have made it clear that schools cannot tackle such complex issues alone. Cross-sector community collaboration in support of students and families has been a positive result of unrealistic expectations that our schools meet the physical, mental, social, emotional, and academic needs of all students.

According to Nowell and Foster-Fishman (2011), despite the emergence of such community collaboration involving schools, health and human service providers, government agencies, and other sectors of support, community or population-level impact has been mixed. Some researchers argue, however, that community collaborations have broader benefits. For example, they often build the capacity of the organizations involved in the collaboration as well as their collective capacity to achieve their goals as participants in the larger system overall (Nowell & Foster-Fishman, 2011). Coalitions also enable organizations to work together on an issue, sharing knowledge, ideas, and strategies, without having to take sole responsibility for its resolution (Butterfoss, Goodman, & Wandersman, 1993). Collective impact is a more recent framework to emerge within community collaboration-building. As previously defined, collective impact brings diverse partners together to address intractable community issues. It is considered a more focused and
disciplined approach due to its orientation toward continuous improvement and the intentional use of data and evidence to inform decision-making and to drive collective action (Edmondson & Hecht, 2014).

Oceanside Unified School District has a history of partnering with local service providers to ensure students have the social, emotional, and academic support they need while attending its elementary, middle, and high school campuses. The adoption of the Common Core State Standards and ongoing professional development have helped to raise the academic bar for all students. Yet, only 34% of the district’s students graduate from high school prepared to succeed in college and career (OUSD, 2016a). Those working within OUSD see firsthand how complex issues such as gang involvement, poverty, homelessness, depression, and substance abuse impact the success of OUSD’s students and their families. Thus, rallying the community to better support the needs of Oceanside’s most at-risk students was a logical role for the school district. By making a nontraditional choice to become the backbone, however, OUSD’s staff would be challenged to build its capacity and competency to move the community-wide, collective impact collaboration forward as well as the people, policies, and practices within its internal system around shared goals and metrics.

In addition to my professional and academic experience, I reviewed the following literature for this Review of Knowledge for Action to inform my thinking and approach to the strategic project. The literature is organized into three categories:

1) The Framework: Collective Impact – The field is rich with articles, research, case studies, and resources to support the launch and development of a collective impact initiative as it moves through the exploring, emerging, and sustaining stages leading to systems-level change (Edmondson & Hecht, 2014). The capacity and competencies of the backbone support are defined and adaptable for a variety of
community-dependent contexts, serving as a guide to OUSD and its community partners.

2) **The Competencies: Adaptive Leadership, Learning to Improve, and Data Excellence** – Facilitating successful community collaborations requires a unique level of leadership and the ability to recognize and lead both technical and adaptive change. Collective impact leadership calls upon the diverse group of partners to develop their individual and collective abilities to see the system and their contribution to its current results, to embrace a commitment to continuously improve, and to prioritize the use of data to inform decision-making and shifts in practice (Heifetz, Linsky & Grashow, 2009; Kania & Kramer, 2015; Senge, Hamilton & Kania, 2015). Most importantly, as the backbone support, The Promise team’s role is to guide the work in a way that “builds coalition leadership as opposed to being the coalition leadership” (Wolff, 2016).

3) **The Clarity: Organizational and Community Coherence** – According to Childress, Elmore, Grossman, and King (2011), coherence occurs when culture, structures and systems, resources and stakeholders are all aligned. Progressive educational systems have learned to bridge instead of buffer themselves to external resources and partnerships to achieve ambitious and complex internal student achievement and system goals (Honig & Hatch, 2004). The Oceanside Promise presents an opportunity for OUSD, The Promise partners, and the Foundation to create coherence and shared accountability across several sectors and many organizations in the collective interest of better prepared graduates and a more prosperous community.
The Framework: Collective Impact

Collective impact is a marathon not a sprint. There is no shortcut to the long-term process of social change.

~Hanleybrown, Kania, & Kramer, 2012

Consultants and researchers Kania and Kramer observed a different approach to collaboration taking place in communities which focused participants on a common issue and emphasized the use of data and metrics to guide their collective work. They coined the term “collective impact” in a 2011 *Stanford Social Innovation Review* article. Collective impact is best suited for complex social issues, such as education reform, that are more often adaptive than technical in nature (Heifetz, Kania, & Kramer, 2004). Unlike technical challenges, adaptive problems are not solvable by one individual or organization or current know-how. Instead, they require changes in the priorities, habits, beliefs and loyalties of individuals (Heifetz & Linsky, 2009). The intentional use of data and evidence is one way that collective impact unearths the complex, adaptive nature of the required change, but also drives collective action toward multifaceted, coordinated solutions.

A transformative approach to community collaboration, collective impact initiatives are identifiable by five distinct conditions (Table 1) including a common agenda, shared measurement, mutually reinforcing activities, continuous communication, and backbone support (Kania, Hanleybrown, & Juster, 2014). Although the framework is adaptable to local needs and environments, each condition is a critical component of how the highly structured, cross-sector coalition is organized. The conditions also serve as a guide for how the partners will interact around their collective work, sorting through what is the work of individual organizations and what will arise as the priorities for coordinated effort (Kania & Kramer, 2013).
The early steps taken to embark on a collective impact initiative are fundamental in setting a solid foundation for short-term success and long-term sustainability. In fact, Hanleybrown, Kania & Kramer (2012) identified that an influential champion, adequate financial resources, and a sense of urgency for change are imperative preconditions to launching a collective impact initiative. Although an initiative can be started with the passion and enthusiasm of one individual or organization, successful change occurs when the initiative becomes a widely-held aspiration that is highly motivating for all parties around the table (Kotter, 2007; Stroh, 2015). Equally important, Hanleybrown et al. (2012) elevate the need for adequate financial resources to build the capacity required to effectively support and mobilize the partners coming together to engage in collective impact work. The authors equate adequacy to two-to-three years of funding for the backbone function within an established anchor organization.

The formalized structure of collective impact initiatives facilitates cross-sector partners to come together to set the common agenda, establish shared measurements, and align mutually reinforcing activities. The first step is to establish an oversight board or Leadership Table and then Collaborative Action Networks (CANS), which are essentially working groups, once priorities have been defined (StriveTogether, 2017). The Leadership Table, most often grasstops or executive-level leaders representing the education, government, nonprofit, business, and faith-based sectors, makes key decisions such as defining the boundaries of the work including issue area and geography (StriveTogether, 2014). It is at the Leadership Table that participants first develop their shared vision for change based on a common understanding of the problem they wish to address and how they will work together to solve it through agreed-upon actions (Kania & Kramer, 2011).
In the spirit of continuous improvement and responsiveness to evolving contexts, the field of collective impact is ever changing. The lessons learned from initiatives across the nation and around the world have elevated the importance of placing equity at the center of collective impact collaborations, integrating social and emotional well-being into the common agenda and metrics, and engaging the communities most affected as equal partners at the decision-making table (Cabaj & Weaver, 2016; Henig, Riehl, Houston, Rebell, & Wolff, 2016; Kania & Kramer, 2015). Furthermore, grassroots organizing and community capacity-building are not consistently embedded in the collective impact framework, thus, they must be pursued with intention as part of the priority setting and strategy development processes. Efforts infused with such strategies are more likely to result in sustained change as it becomes change with a community, not change imposed on a community. Some communities are also emphasizing social movement building as partners bump up against a need for greater awareness, better understanding, and urgency in action around many of their priorities and the systemic barriers that require public and political will to change (Cabaj & Weaver, 2016).

Staying true to collective impact’s roots in data and evidence, there is an evolutionary focus on measuring the impact and effectiveness of collaborations beyond the traditional academic baseline report metrics. In reviewing 182 education-related collective impact initiatives, Henig et al. (2016) found that only 5% had social and emotional development indicators, “an indicator that has been recognized as crucial for 21st century learning and attainment” (p. 30). Thus, some expanded common agendas now include safety, health, and social-emotional outcomes and indicators. Other researchers have identified the need and opportunity to evaluate the collaborative itself. Broader outcomes suggested include assessing the collective learning of the partners, their practice of democratic values (i.e.,
transparency, equity, inclusion, accountability) as well as the legitimacy and sustainability of the collaborative (Henig, Riehl, Rebell, & Wolff, 2015).

Butterfoss and Kegler (2002) determined in the early nineties that coalitions such as the Oceanside Promise evolve in defined stages. These nonlinear stages are cyclical, flexing and adapting as new partners come to the table. The StriveTogether’s Cradle to Career Theory of Action identifies the stages as “gateways” moving from building to achieving impact (Exhibit 2). Early on, the partnership is considered “exploring” because cross-sector individuals and organizations are evaluating the possibility of such partnership in mitigating critical community issues such as increasing access to quality early childhood education or improving postsecondary certificate and degree completion. With a shared vision and commitment to collaborate, they move from “emerging” to “sustaining,” with the ultimate goal of improving systems and achieving large-scale social impact (StriveTogether, 2017).

Exhibit 2: StriveTogether Cradle to Career Theory of Action

![StriveTogether Cradle to Career Theory of Action Diagram](image-url)

The Competencies: Adaptive Leadership, Learning to Improve, and Data Excellence

*Change, by definition, requires creating a new system,*

*which in turn always demands leadership.*

~Kotter, 2007

Transforming a school system, much less a community, is a herculean endeavor. Yet, those involved in education-focused collective impact initiatives seek to accomplish both. Beyond the evidence-based, data-informed approach taken by such collaborations, the ability to lead within complex and ever-changing environments is a critical competency of backbone leaders and staff. For leaders in collective impact, this requires the rare skill to move between sectors, building bridges, trust, and ownership along the way.

Although no single partner holds all the power and authority, backbone support is vital to the development and sustainability of a collective impact initiative (Giloth, Hayes, & Libby, 2014). The varied roles of the backbone function include staffing, convening, communicating, fundraising, data support, partner and community engagement, advocating, and advancing policy change (StriveTogether, 2014). These roles, as defined by the Collective Impact Forum in its *Collective Impact Principles of Practice*, are carried out by dedicated staff which most often includes an executive director, coordinator/facilitator, and data analyst. These positions may be housed in one entity or across multiple partners depending upon the time, money, and talent available to the collaboration.

Ultimately, being the backbone requires a dedicated set of skills and leadership expertise that may exist within one or across many organizations (Giloth et al., 2014; Hanleybrown et al., 2012; StriveTogether, 2014). For example, data collection and analysis is a core skillset for developing indicators, making sense of multiple sources of data, tracking progress, and reporting results. It requires skills in gathering data from multiple sources,
making sense of it, and using it to ignite and guide collective action (Cabaj, 2014). Metaphorically, the data keeps the heart of the collaboration beating. The communications function keeps people informed and engaged, while the ability to fundraise provides stability and sustainability. Furthermore, due to its ability to challenge long-standing systems and structures, collective impact calls for core competencies in adaptive leadership, continuous improvement, and evidence-based decision-making to be embedded in the backbone support and threaded throughout the collaborative partners (Hanleybrown et al., 2012; StriveTogether, 2014).

Adaptive Leadership

Change or transformation in organizations and communities is a process that takes time and sustained, deliberate effort (Kotter, 2007). Collective impact seeks to move a community through change, addressing root-cause issues, and leading to long-term systems-level transformation. According to Heifetz and Linsky (2002), change challenges people’s beliefs, behaviors, and habits, requiring adaptive leaders who can ask difficult questions, allow people to grapple with the solutions, and push them forward at a pace they can handle. Summarily, adaptive leadership is about seeing the larger system, being open to the changes taking place in the world around us, making effective decisions in harmony with those changes, galvanizing those around you to embrace the change, and implementing strategy and decisions appropriately based on culture and context (Glover, Rainwater, Jones, & Friedman, 2002a). Thus, collective impact leaders—as adaptive, systems-level leaders—must be able to see both the system and the people within the system because it is the people and their behaviors that will enable or block change (Senge, 2006). Additionally, a truly adaptive leader will not allow their past experiences or personal limitations to cloud their perceptions
of new and evolving contexts (Glover et al., 2002b). They see culture, context, and people, with all their differences, as assets and vital to the success of the collaboration (Butterfoss et al., 1993; Glover et al., 2002b).

Backbone leadership also requires a uniquely skilled individual who is comfortable with ambiguity and sees his or her role as building the capacity of the staff and partners to navigate complexity and adapt accordingly (Kania & Kramer, 2011). Building trust and respectful relationships is a cornerstone of coalition leadership (Glover et al., 2002a). Such leaders require a keen sense of understanding when they are encountering a technical change, which can be solved with existing resources and expertise, and when the deeper, more human side of adaptive change is at play, which evokes fear, feelings of loss, and resistance (Heifetz & Linsky, 2002). Adaptive change does not have a readily available solution and requires a variety of stakeholders, innovative thinking, and collaboration to solve (Kania & Kramer, 2011). Thus, collective impact initiatives, when they are high-functioning and focused coalitions, provide a venue for diverse groups to come together to solve issues that are too complex to solve alone (Butterfoss & Kegler, 2002).

In early research on effective coalitions, Butterfoss et al. (1993) found that more cohesive coalitions were led by individuals who listened to members’ concerns, negotiated competently, acquired new and leveraged existing resources, solved problems and resolved conflict. The need for the latter of these skills—solving problems and resolving conflict—emerges as groups tackle more complex social issues. As successful backbone leaders recognize the difference between technical and adaptive change, they mobilize resources while engaging in collective learning, reconciling division and motivating people to act (Heifetz, Grashow, & Linsky, 2009; Giloth et al., 2014). They use both formal and informal authority to engage, support, and motivate all partners at the table by navigating and building
bridges across sectors. They also recognize that ambivalence and resistance are evoked by change and that moving people is not about whether they believe they need change as much as whether they want to change (Evans, 2010). Stroh (2015) goes as far as to advocate that leaders who seek to achieve systems-level change must stir “confrontation founded on compassion,” thus, increasing people’s awareness of their actions and how they are contributing to the current conditions that they seek to change (p. 132).

Successful change leaders are adept at helping others find both their purpose and a place at times of uncertainty and change (Ganz, 2009). All the while, they are building the capacity of others and empowering those around them to achieve more than they thought possible themselves (Fullan & Quinn, 2016). They do so because in addition to seeing the larger system, they foster reflective and generative conversations by which they learn about and appreciate others’ perceptions of the world, shifting groups from reactive problem-solving to co-creating a more desirable, inspired future (Senge, Hamilton, & Kania, 2015).

Finally, backbone leadership and collective impact by its data-driven nature is not only designed to, but obligated to elevate issues of equity (Cabaj & Weaver, 2016; Kania & Kramer, 2015). Challenging the existence of institutional racism, systems of oppression, geographic segregation, and disparities in economic and educational opportunity goes to the core of adaptive change and naturally courts resistance and, in many cases, avoidance. By thwarting the status quo and creating disequilibrium in the environment (Heifetz et al., 2009), adaptive leaders must be persistent, yet vulnerable themselves. In short, the leader of the backbone and those within the collaborative are not immune to change themselves. According to Kegan and Lahey (2009), addressing adaptive problems requires the leader to understand how the challenge comes up against his/her own limits and accept that solutions will require him/her, as well as others, to change. As a result, the adaptive leader is called
upon “to rise above personal needs and predisposing biases and assimilate information from the environment so that the leader and the organization can adapt as required” (Glover et al., 2002b, p. 22). Most importantly, because change, especially related to equity, seeks to upend entrenched and often unrealized beliefs, values, and behaviors, backbone leaders and their partners must start where people are, remaining curious without judgment, even when they think they know best how to address the issue (Heifetz & Linsky, 2002).

**Learning to Improve**

In 2005, management guru Collins released *Good to Great for the Social Sectors* and argued that great social organizations, like businesses, are recognizable by their superior performance and distinctive impact over extended periods of time. OUSD and the Oceanside Promise partners have come together with the aspiration of achieving significant long-term change in the conditions of children, youth, and families in Oceanside. Both, as exemplified by the adoption of the collective impact framework within the community and the implementation of improvement science methodology within the district, have demonstrated an interest in continuous learning and improvement.

Beneficially, there is also commonality between the two approaches. Collective impact calls for developing a case for change with the use of data and asset mapping, creating a leadership and working group collaborative structure, and establishing a common agenda with agreed upon metrics (Hanleybrown et al., 2012; Kania & Kramer, 2011; Stroh, 2015). Improvement science starts with identifying the issue or area for improvement, understanding the components within the system, identifying what to measure, and establishing improvement networks (Bryk, Gomez, Grunow & LeMahieu, 2015). This synergy is opportune as learning to improve is a prerequisite to the long-term, systems-level...
change sought by collective impact initiatives and, although fairly new to education systems, a discipline that has the potential to significantly improve performance within the district, its schools, and classrooms.

Achieving the status of a learning organization requires discipline and ongoing capacity building. Preskill, Parkhurst & Juster (2014) explain that collective impact is not a solution but rather a continuous learning process by which those involved must stay attuned to changing contexts, new information, and better approaches so that strategies can be adapted or shifted quickly. In fact, there is continuous reflection on the impact of decisions made and strategies employed on the partners and the ecosystem as they strive to improve outcomes for children, youth, and families (Edmondson & Hecht, 2014). With respect to improvement science, Bryk et al. (2015) advise participants to constantly ask themselves the following guiding questions: 1) “What is the specific problem I am now trying to solve?” 2) “What change might I introduce and why?” and 3) “How will I know the change is actually an improvement?” (p. 9).

Concurrently, the backbone staff of The Promise are facilitating the collective impact process within the community and are active participants in the improvement science capacity building within the district. This allows the team to gain both knowledge and skill in using data and cultivating discipline in continuous learning. Wagner et al. (2006) caution, however, that a system of continuous learning and improvement requires much more than time, talent, and money. It can only be successful if there is psychological safety for participants in the form of trust, space to share their perspective, opportunities for active engagement, and a shared investment in the desired outcome (Edmonson, 2008; Wagner et al., 2006). Educators and community partners will engage in risk-taking and endure continuous evaluation of their contribution to the work if they feel it is fair and in the spirit
of learning (Wagner et al., 2006). It is through the intentional building of trusting relationships, cultivating safe spaces, and creating an improvement-orientation that the partnership will gain the necessary insight into “what works, for whom, and under what conditions?” (Bryk et al., 2015, p. 140), leading it closer to the large-scale impact it seeks to achieve.

Data Usage Excellence

According to the collective impact literature reviewed for this capstone, using data to inform decision-making and improvement is a core practice in collective impact initiatives. High-performing districts, schools, and classrooms consistently and routinely use data to improve teaching and learning as well. Yet, data can be intimidating, and its use as a “hammer instead of a flashlight” in education exacerbates that intimidation factor with educators (Edmondson & Hecht, 2014, p. 6). In collective impact initiatives, qualitative and quantitative data are gathered, directly and indirectly, to deepen understanding of complex social issues, student success, school well-being, and program performance. Across constituencies and environments, data are used to capture the hearts and minds of individuals, build urgency, and create and sustain momentum (Wagner et al., 2006). Most importantly, starting with data grounds conversations in evidence and focuses participants on what they see versus what they believe is possible or true for children, schools, and communities (Boudett, City, & Murnane, 2015)—something that is especially important in breaking through preconceived notions, implicit biases, and protective behaviors.

Evidence-based decision making is a key pillar in the collective impact theory of action, with partners agreeing to shared accountability and a commitment to improve community-level outcomes by tracking a core group of related indicators (Edmondson &
Hecht, 2014). The expectation is that this common agenda with agreed-upon metrics is communicated to the public and reported on regularly. According to Cabaj (2014), “accountability in adaptive contexts requires social innovators to be accountable to each other for achieving results over the long-term, a deep commitment to robust evaluation and learning processes, and the ability and courage to quickly change ideas, plans, and direction when the data tells them they are headed in the wrong direction or when the context they are operating in shifts so much that their approach is no longer relevant” (p. 111).

Thus, the collaborative partners hold each other collectively accountable to the prioritized student and community outcomes. Supporting the collective impact approach, Bryk et al. (2015) point out that “common data are key to sensing overall system performance, identifying sources of variation in outcomes, and continuing the processes of learning to improve” (p. 111). The agenda’s metrics undergo continuous review in order to monitor progress, inform strategy development and adjustment, and maintain engagement.

Districts that use data well use it foster greater understanding and to instill a sense of urgency around the need to improve teaching and learning (Wagner et al., 2006). In addition, they use it to provide focus and guidance for those within the system. This applies to community collaborations as well. Organizations interested in building an inquiry mindset and creating a culture of continuous improvement informed by data can begin small. Boudett et al. (2015) recommend starting by identifying what data are already available, recognizing that no single piece of data will provide the full picture of student, family, and community abilities, assets, or needs. Honoring the learning to improve sentiment of improvement science, creating a culture that values data as a tool for deeper understanding, learning, and growth is essential (Bryk et al., 2015). Highly effective education systems use population-level data, as well as diagnostic data four to six times per year, to monitor and
report progress (Wagner et al., 2006). Within collective impact, the common agenda, shared metrics, and disciplined use of data provide partners with a common language and a North Star for collaborative action (Giloth et al., 2014).

One common, but not insurmountable, barrier to achieving excellence in data usage within districts and amongst collaborative partners is the availability of a centralized and high-quality data system. Data used by districts is often housed in multiple systems (e.g., National Student Clearinghouse, state education departments, in-house databases, and site-level spreadsheets), which are incompatible and require significant effort by district- and school-level staff to create valuable dashboards to inform decision-making and to improve teaching and learning. Community collaborations are faced with even greater challenges as the development of data systems which pull together information from multiple partners and sources can be cost prohibitive. Many communities have pursued collective impact approaches and delayed the burden of cumbersome, high-cost systems by engaging in data-sharing agreements, focusing on a narrow set of indicators, or having partners analyze and share their own data (Cabaj, 2014). Thus, although the development of such data sharing systems is important, their absence in a community should not prevent partners from starting the process of sharing and analyzing data, and evaluating progress together.
The Clarity: Creating Organizational and Community Coherence

Coherence suggests that there is harmony, unity, and integrity between your vision and mission, your roles and goals, your priorities and plans, and your desires and discipline.

~ Covey, 1989

Organizations, districts, and communities are comprised of systems and structures designed to create efficiency, consistency, and in some cases, compliance. These systems and structures are created over time to support continuous reforms, but little effort is made to undo or evolve those systems and structures that no longer serve articulated goals (Childress et al., 2011). In the end, this layering contributes to the lack of coherence and exacerbates inefficiency and inaction. This same layering of systems and structures can be found in communities, impacting equitable access to housing, education, and economic opportunities.

Fullan and Quinn’s (2016) research with educators across the world revealed a consistent theme of confusion and overload with “initiative fatigue, ad hoc projects, arbitrary top-down policies, compliance oriented bureaucracy, silos and fiefdoms, distrust and demoralization” (p. 4). Research conducted by MJE Marketing within OUSD revealed a similar sentiment as well as confusion about vision, mission, and priorities. This perceived multitude of approaches, plans, and priorities has the potential to confuse and frustrate teachers, leaders, and staff within the district, and in the community. Thus, working toward coherence is critical in achieving the desired impact of preparing all students—regardless of race, class, or past academic performance—for college and career.

According to Childress et al. (2011), coherence means that all elements within the district are integrated and working together toward the advancement of a clearly articulated strategy or vision. The vision provides direction for those in the organization, and without a vision, “a transformation effort can easily dissolve into a list of confusing and incompatible
projects that can take an organization in the wrong direction or nowhere at all” (Kotter, 2007, p. 5). Focused and well-articulated strategies help leaders sift through which activities and programs are mission critical and which can be sidelined or stopped (Johnson, Marietta, Higgins, Mapp, & Grossman, 2015). The first three conditions of collective impact—a common agenda, shared measurement, and mutually reinforcing activities—provide such coherence within community coalitions. The coherence comes from the stakeholders agreeing on community-level outcomes and indicators, defining how success will be measured and reported, and clearly identifying the indicators that each partner can help move (Cabaj, 2014).

Creating coherence is easier said than done however. The Public Education Leadership Project at Harvard University identifies five organizational elements that influence coherence including: culture, structures and systems, resources, and stakeholders (Johnson et al., 2015). Each of the elements are complex in and of themselves and significantly impact the ability of an organization, such as a school district or coalition, to further prioritize strategies and to achieve ambitious goals. For example, the power of norms and behaviors that make up the culture of an organization or group cannot be underestimated. Culture can be detrimental to the success of any organized effort if the deeply held beliefs by participants, a characteristic of strong cultures, contradict the goals of those in leadership roles or responsible for guiding the strategic direction (Johnson et al., 2015). Challenging the way people do their work gets at the core of culture change and is achieved only when what you are trying to do becomes the accepted way of doing business (Kotter, 2007).

Creating coherence is about building the capacity of others—helping them develop the skills, competencies, and knowledge necessary for goal attainment (Fullan & Quinn,
Fullan and Quinn advocate that achieving coherence can only be accomplished through both action and interaction. Thus, people within the system are the crafters of coherence through ownership and their own sense-making (Honig & Hatch, 2004). By building shared ownership and responsibility for the system’s problems, the collective mindset shifts to a deeper level of engagement, bringing about a new sense of purpose, mission, and commitment to change (Wagner et al., 2006).

Theory of Action

Leveraging the unique placement of the backbone capacity of the Oceanside Promise collective impact initiative within OUSD, a public school district, the theory of action below guided my strategic project and the resulting capstone.

If We…

• Facilitate shared ownership within Oceanside Unified School District and amongst the community partners of the Oceanside Promise and its vision for every student to graduate college, career, and life ready;
• Build the capacity of OUSD and The Foundation to execute the backbone functions of a collective impact initiative; and
• Develop internal and external structures that facilitate deeper understanding, and ignite collaborative action around prioritized social, emotional, safety, and academic outcomes;

Then…

• The Oceanside Promise will have broad-based, cross-sector support of its vision and goals;
• The community partners and backbone team will develop and possess the necessary skills and competencies to collaborate effectively; and
• Structures inside the district and within The Promise partnership will be established, supported, and action oriented.
All of which will result in leveraging and aligning district and community supports, services, and financial resources to improve the social, emotional, and academic success and prosperity of Oceanside’s children, youth, and families. The Oceanside Promise will be supported and sustained by The Promise partners and the Oceanside community, which will benefit socially and economically from increased numbers of students graduating prepared for college, career, and life.
THE STRATEGIC PROJECT

My strategic project was to co-lead the advancement of the Oceanside Promise collective impact initiative by developing a multiyear roadmap for its short- and long-term sustainability. This required me to lead across three distinct, but critically connected entities: the Oceanside Unified School District, the Oceanside Promise Foundation and the Oceanside Promise (Exhibit 3). OUSD was the anchor organization for the backbone capacity and the seed funder of The Promise. Thus, the commitment of OUSD’s leadership and board to fulfill such a unique role for a public education system, despite financial and political pressures, would be imperative. Although Dr. Coleman envisioned a future where the backbone capacity would be anchored within the Oceanside Promise Foundation, the nascent nonprofit was not yet positioned to assume such a role. Thus, working with The Foundation’s volunteer board to create clarity in direction and build board capacity would be part of planning for The Promise’s long-term sustainability. Advancing The Promise’s collective impact work with FSG’s Five Conditions of Collective Impact (Table 1) and StriveTogether’s Cradle to Career Theory of Action (Exhibit 2) as my guides would be the heaviest lift of the strategic project as it involved guiding the Leadership Table and the three active CANS (e.g., Kindergarten Readiness, College and Career Readiness, and Data) toward greater ownership, shared measurement, and the alignment of mutually reinforcing activities.

Exhibit 3: Collaborative and Backbone Support
THE APPROACH

Big problems are rarely solved with commensurately big solutions. Instead, they are most often solved by a sequence of small solutions, sometimes over weeks, sometimes over decades.

~Heath & Heath, 2010

Advancing and sustaining the Oceanside Promise meant leading and supporting OUSD, The Foundation, and the cross-sector collaboration through multiple processes to bring clarity about purpose and direction, inspire shared ownership, build capacity, and create intentional structures for the district and the partners to collaborate and take collective action. The strategic project planning and implementation timeline (Appendix 1) extended beyond my residency, but provided an ongoing implementation guide. However, the main deliverable was a high-level, multiyear strategic roadmap for The Promise with OUSD as the anchor for the backbone and The Foundation as the fundraising support (Appendix 2). Although not isolated activities, I simplified the planning and implementation of my strategic project, for the purposes of this capstone, into the following four stages:

Stage 1: Understanding Context and Assessing Capacity
Meet with key stakeholders to better understand the community and organizational context in which the Oceanside Promise was operating. Assess the current state of The Promise using the Five Conditions of Collective Impact (Table 1) and the StriveTogether Theory of Action (Exhibit 2) as the guiding frameworks.

Stage 2: Creating Clarity, Coherence, and Direction
Lead strategic planning sessions and coordinate meetings to create clarity, coherence, and direction within and across OUSD, The Foundation, and The Promise partners.
**Stage 3: Facilitating Shared Ownership and Accountability**

Plan Foundation board and Leadership Table meetings and lead a full-day retreat to facilitate shared ownership amongst all partners and participants of The Promise’s cradle to career goals and sustainability. Set the stage for expanding the common agenda to include a safety, health, and well-being goal area and shared metrics.

**Stage 4: Establishing Structures for Collaboration, Accountability, and Improvement**

Create intentional structures within OUSD and The Promise to facilitate ongoing collaboration, increase district alignment, and secure partner commitments to shared social, emotional, and academic measures and continuous improvement.

Stages 1 and 2 were fully executed during the strategic project. Stage 3, facilitating shared ownership and accountability, is not something achieved in one meeting or set of activities. The foundation was laid through the activities I led, but additional work beyond my residency would be necessary for Dr. Coleman and the remaining backbone team. Most notably, achieving shared ownership and accountability requires the careful cultivation of relationships and trust amongst the partners over time. Elements of Stage 4 were started as well, but not fully executed due to the pace of work in the other stages, budget challenges and reorganization occurring in district, and the need for additional planning. This will be covered in greater detail in the Analysis of Execution section of this capstone.

**Stage 1: Understanding Context and Assessing Capacity**

From July through December 2016, I met with nearly 40 individuals from within the district and across the community. The diverse group included district administrators and school board members, current and former teachers, union representatives, community members, and partners involved in The Promise and The Foundation. In each discussion, I
sought to better understand people's hopes and concerns about Oceanside in addition to their aspirations for its students and families. Most importantly, I wanted to hear how each talked about the Oceanside Promise and its relevance to the district and the community. Although the conversations were fluid, I incorporated the following five simple questions into each discussion:

1. What makes Oceanside unique or special?
2. What are the greatest challenges facing Oceanside?
3. What do you think about Oceanside Unified School District?
4. What do you know about the Oceanside Promise?
5. What hopes/concerns do you have about the Oceanside Promise?

Those directly involved with The Promise or The Foundation were consistently asked: 1) Why are you involved in The Promise/The Foundation?; 2) How do you feel about the progress of The Promise/The Foundation?; and 3) What would you like to see happen in the future?

On a parallel track, I assessed The Promise’s progress with respect to the five conditions and the gateways identified in the StriveTogether Theory of Action. The process was more nuanced than simply checking a “complete or incomplete” box. Underlying factors such as access to adequate resources (i.e., time, money, and expertise), the relevancy and completeness of the common agenda, the degree of commitment and trust amongst partners, the availability of needed data, among other factors, needed to be understood and considered in planning next steps and the overall strategic direction. Taking the time to ensure all partners understood the collective impact framework, believed in the vision, and were committed and willing to be held accountable to student success would increase the likelihood of long-term success. Evaluating the backbone capacity of The Promise was also
an important part of the assessment, as collective impact literature identifies a well-
resourced, dedicated, and independent backbone as critical to collaborative effectiveness. In
addition, the core functions of the backbone—such as strategic guidance, facilitation, data
analysis, and fundraising—are encouraged by researchers and practitioners within one
anchor organization or across multiple organizations (Giloth et al., 2014). I anticipated the
placement of the backbone support within the school district would present unique
challenges and opportunities. Table 2 below captures my exploratory assessment of what
might emerge as the pros and cons of a district-anchored backbone.

Table 2: Pros and Cons of District-Anchored Backbone Support

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Respected superintendent who can bring people to the table</td>
<td>• Public/political opposition to use of district resources for the benefit of multiple partners</td>
</tr>
<tr>
<td>• Ability to accelerate in-district alignment to priorities and activities to common agenda goals and metrics</td>
<td>• Having to defer to partnership decisions about priorities and approaches related to education system and student success</td>
</tr>
<tr>
<td>• Building of data-informed, continuous improvement capacity of district resulting in more discipline and focus</td>
<td>• Need to acquire or cultivate in-district backbone leader and support skills/expertise</td>
</tr>
<tr>
<td>• Greater understanding of community resources and opportunities to maximize cross-sector partnership in the interest of students</td>
<td>• Perception of being the district’s initiative; risk of not being “owned” by the community</td>
</tr>
<tr>
<td>• Leveraging of public resources with private resources (i.e., time, money, and talent)</td>
<td>• Having to abide by or work within school system bureaucracy and policies</td>
</tr>
<tr>
<td>• Development of new skills within district staff including collaboration building, facilitation, resource development, and adaptive leadership</td>
<td>• Competition for resources (time, money, and talent) to adequately support the work (dedicated staff)</td>
</tr>
<tr>
<td>• Demonstrating to educators and community members how collaboration can better support students and facilitate improved learning</td>
<td>• Struggle to maintain neutrality and keep focus on schools plus community activities, not just the education system’s needs or activities</td>
</tr>
</tbody>
</table>
Stage 2: Creating Clarity, Coherence, and Direction

The need to create clarity, coherence, and direction within OUSD, The Foundation, and The Promise emerged early in my residency as I better understood how and when The Promise was seeded and launched. As Dr. Coleman assumed the superintendent role in July 2014, he spoke passionately about The Promise and framed it as work already taking place in the district. It was now everything that schools and classrooms were doing to support the success of students along with a new way of partnering with the community. The positioning was intended to alleviate concerns about The Promise being “one more thing” for teachers and administrators to manage, however, this positioning also contributed to internal confusion. Dr. Coleman also initiated the creation of The Foundation, but chose not to establish it as the district’s educational foundation. Its nonprofit status application positioned it as an organization that would provide educational services, programs, and scholarship support to Oceanside’s students and families. It failed to mention, however, its connection to the Oceanside Promise collective impact initiative and the initiative’s eventual dependence on The Foundation.

Researchers conducted by MJE Marketing, OUSD’s communications firm, during the second year of Dr. Coleman’s as superintendent, highlighted the need to clarify the strategic direction of each entity and to bring coherence to their individual and collective work. I planned the following activities as preliminary steps to eliminate the confusion about OUSD’s vision and strategic direction, frustration about resources being directed to The Promise, and waning interest within The Foundation’s board.

Clarity, Coherence, and Direction within OUSD

- Lead OUSD’s executive leadership team through the development and adoption of a new vision, mission, and values
• Support the planning of a district-wide rollout and the development of communications materials
• Present to key in-district stakeholders about the connectedness and coherence between OUSD and The Promise

*Clarity, Coherence and Direction within The Foundation*

• Interview board members about their involvement, needed improvements, and The Foundation’s direction
• Lead The Foundation’s executive committee and board through the development and adoption of a new mission and multiyear strategic plan
• Guide Foundation leadership through board reconstruction planning

*Stage 3: Facilitating Shared Ownership and Accountability*

I was most interested in advancing The Promise partners in their collective impact journey during my residency. The foundation had been set and components of the collaborative structures had been activated such as the Leadership Table and three Collaborative Action Networks (CANS) (i.e., Kindergarten Readiness, College and Career Readiness, and Data). Informed by the context, my stakeholder conversations, and the work underway, I had two primary ways for advancing The Promise during Stage 3 of my strategic project:

*Ownership and Accountability Moves within The Promise*

• Lead and co-lead meetings with the Leadership Table and three active CANS, bringing data into the discussion by reviewing existing data and exploring core and contributing indicators. Foster shared ownership and relationships through small acts of collaboration
• Plan and facilitate a full-day retreat with representatives from OUSD, The Foundation, The Promise, and the community to foster shared ownership, ignite urgency, and
seed the expansion of The Promise’s agenda to include safety, health, and well-being outcomes and indicators in order to align with the social, emotional, safety, and health needs of Oceanside’s students.

During the timeframe of this capstone (July 2016 – February 2017), there were more than twenty meetings between the Leadership Table and three active CANS, as well as the full-day retreat. In addition, Vicki and I had separate planning retreats to assess our progress and map out next steps along the way. The Promise and The Foundation strategic planning informed the development of a high-level strategic roadmap for the advancement of the collective impact initiative and its sustainability (Appendix 2).

Stage 4: Establish Structures for Collaboration, Accountability, and Improvement

The Five Conditions of Collective Impact are embedded within the StriveTogether Theory of Action. The Theory of Action is a flexible framework for moving communities from exploring the possibility of partnership to the formalizing structures for collaboration, shared accountability, and continuous learning and improvement. As previously stated, some of this work was already in place for The Promise, but there was also opportunity to improve upon the foundation that was laid in an effort to increase the likelihood of short- and long-term success. We planned to do this by introducing a co-chair leadership model within the Leadership Table and the CANS, finalizing the community-level outcomes and indicators with partner commitments clearly articulated, and setting the stage for continuous learning and improvement within OUSD and across the partners.

From the start, I believed the unique placement of the backbone support within OUSD also presented a significant opportunity to leverage collective impact’s data-informed, evidence-based, and continuous improvement orientation to align and improve the internal
system. The initial Oceanside Promise agenda was solely focused on academic indicators and improvement. The goals and indicators were also directly aligned with priorities identified in OUSD’s Local Control Action Plan, a state compliance document and roadmap for district improvement. Thus, my timeline included bringing district leadership together to discuss The Promise’s agenda, getting input into the outcomes and indicators being explored by the community partners, and fostering internal commitment to work inside and outside system to improve the prioritized metrics of student success.

Two other strategies included launching a Data Culture and Competence Team (DCCT) within OUSD and establishing regular meetings with all district staff involved in The Promise’s Leadership Table and CANS. My plan was to have the cross-functional DCCT define its desired data culture, assess current data use within the district, and then design processes, systems, and supports to better use data for decision-making and improvement at the district, site, and classroom levels. The regular scheduled meetings with Promise-involved staff would provide a more structured approach for sharing information, solving problems collaboratively, soliciting internal support, and ensuring the district was moving its commitments to the community and its partners forward. This emerged as a need because we discovered that OUSD’s staff involved in the CANS would attend meetings, but not bring the discussion or action items that emerged back to the district for implementation. For example, developing a dual enrollment program and exploring a kindergarten assessment were identified as priorities by The Promise partners in late 2015 and early 2016, respectively, but had stalled within OUSD and remained unresolved throughout my residency.
EVIDENCE OF PROGRESS

I made significant progress in advancing much of the work within OUSD, The Promise, and The Foundation during the eight months covered within this capstone. The time I dedicated to meet with key stakeholders early on and throughout the strategic project’s implementation informed priorities, the sequencing of activities, and critical strategy decisions. Forty interviews were scheduled and completed as part of my multi-month listening and learning tour. In each, I sought to understand the community, perceptions of OUSD, and the context for The Promise’s creation. I also wanted to gauge people’s understanding and commitment to The Promise. For simplicity, this section of the capstone is organized by entity (i.e., OUSD, The Foundation, and The Promise) with key evidence of progress presented for each. I led significant portions of the work outlined as well as co-led with Dr. Coleman, Vicki Gravlin (OUSD’s director of community engagement and innovation), Vu Nguyen (The Foundation’s board president), and other OUSD leaders and staff.

Progress within OUSD: Clarity and Coherence

As part of my residency, I met with Dr. Coleman weekly to learn about his approach to leadership, his vision for the district, and his hope for The Promise and its impact on students, families, and the Oceanside community. These conversations helped me understand how he saw the work of the district and The Promise as deeply intertwined. The surveys and focus groups conducted by OUSD’s communications firm during the 2015/2016 school year showed that OUSD’s staff, board, parents, and community wanted to understand the vision and direction of the district. My meetings with key stakeholders reinforced the need for such clarity as well. It would also help alleviate any confusion about
The Promise.

As a former strategic planning and communications consultant, I offered to lead OUSD’s executive cabinet through the development and rollout of its new vision, mission, and values. Between November 2016 and January 2017, I led two planning sessions and a full-day retreat with the leadership team including Dr. Coleman, the deputy superintendent, the associate superintendent of business services, and the associate superintendent of human resources.

The guiding principles development process was extremely efficient as my listening tour unearthed quality vision and mission-related work led by OUSD’s director of communications and K-12 mathematics coordinator during the 2014/2015 and 2015/2016 school years. Combined, the two processes gathered input from more than 2,000 stakeholders including district and site administrators, teachers, counselors, board members, and parents through workshops, retreats, focus groups, and surveys. The vision and mission were pulled directly from the previous work and only slightly modified. I drafted the values using content from the previous processes, my stakeholder meetings, and one of the strategy sessions that I facilitated with the executive leadership. The new guiding principles (Appendix 3) were deemed final by the executive cabinet in late January 2017 and presented as a final product to the school board, district directors, and site administrators in early February.

With the vision, mission, and values defined, I also developed a visual (Exhibit 4) as a tool for bringing clarity and coherence to OUSD’s partnership with The Promise. I used the sense-making tool in my planning sessions with the leadership team and included it in presentations to OUSD’s directors and principals to show how the district’s work was distinct, but aligned to The Promise. The vision statements of both efforts aspired for
OUSD’s students to graduate college and career ready. Although The Promise’s agenda, (embedded as arrows in the middle of the visual) extended beyond the K-12 system, its goals were common to those outlined in OUSD’s Local Control Action Plan (e.g., third-grade English Language proficiency, eighth-grade mathematics proficiency, A-G coursework completion – See Table 3). The objective was to show that The Promise would support the district’s student success priorities and it would inspire and facilitate shared community ownership in the social, emotional, and academic success of all students.

**Table 3: California’s A-G Coursework Requirements**

<table>
<thead>
<tr>
<th>Coursework</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>History/social science (“a”)</td>
<td>Two years</td>
</tr>
<tr>
<td>English (“b”)</td>
<td>Four years</td>
</tr>
<tr>
<td>Mathematics (“c”)</td>
<td>Three years</td>
</tr>
<tr>
<td>Laboratory science (“d”)</td>
<td>Two years</td>
</tr>
<tr>
<td>Language other than English (“e”)</td>
<td>Two years</td>
</tr>
<tr>
<td>Visual and performing arts (“f”)</td>
<td>One year</td>
</tr>
<tr>
<td>College-preparatory elective (“g”)</td>
<td>One year</td>
</tr>
</tbody>
</table>

Source: California Department of Education

**Exhibit 4: Visual to Explain Coherence Between OUSD and The Promise**
I also worked with the director of communications to develop a schedule for communicating the new direction throughout the district and developed the base presentation to be used. She then led the development of all the talking points and supporting materials for district leaders and school sites. The district-wide rollout was anticipated to be completed by May 2017.

**Progress of The Foundation: Clarity and Direction**

The strategic planning process for The Foundation extended from September 2016 to March 2017. Of the forty interviews that I conducted during my residency, twelve were foundation board members, several of whom were also members of The Promise’s Leadership Table. In addition, I facilitated planning sessions with the executive committee and presented the draft plan and high-level summary (Appendix 4) to the full board at the February 6, 2017 board meeting. Through the process, The Foundation’s mission was changed to clearly communicate that the nonprofit existed to “inspire individuals and organizations to invest in the Oceanside Promise and its vision of ensuring every student graduates from high school ready to succeed in college, career, and life.”

The core components of the strategic plan focused on building organizational capacity and infrastructure to fundraise and to manage donor investments effectively and efficiently. The plan also called for the current board composition to be revisited and evolved so that it was comprised of individuals who were interested in fundraising and ready to open their personal networks to accomplish The Foundation’s donor cultivation and fundraising goals. Additional planning would be required between February and May to advance a more robust development plan with the remaining members.

The board was presented with three versions of an organizational budget ranging from conservative to ambitious. The most ambitious version would allow for the backbone
support of The Promise initiative to either be anchored by The Foundation, or to be a Foundation-funded capacity within OUSD. Our next step was to convene a core group of board members, identified as the key leaders who could help take The Foundation to the next level. With planning and preparation underway, the strategy meeting was on track to occur by mid-March 2017.

**Progress of The Promise: Advancing Collective Impact**

Advancing The Promise was much more complex and nuanced than my progress with OUSD and The Foundation. I mapped the current state of The Promise initiative against the Five Conditions of Collective Impact early in my residency and again during in the writing of this capstone (Table 4). Although collective impact initiatives do not move through the five conditions or the StriveTogether gateways (e.g., exploring, emerging, sustaining) in a predictable or linear manner, the high-level assessment helped me to identify opportunities to keep The Promise partners moving forward. For example, I led the Leadership Table partners to adopt common messaging about The Promise (Appendix 5), evolve the common agenda to include a Safety, Health, and Well-being goal area (Exhibit 5) and brought forward a dashboard of common and relevant indicators to seed discussions about shared measurement, which expanded the discussion beyond exclusively academic measures (Appendix 7).

**Exhibit 5: Expanded Oceanside Promise Agenda**
Table 4: Assessing Progress in Meeting the Five Conditions

<table>
<thead>
<tr>
<th>Condition</th>
<th>Gap Analysis (Conducted Early in Residency)</th>
<th>Progress (At Capstone Writing)</th>
</tr>
</thead>
</table>
| **Common Agenda**                 | • Key partners at the table (in name and/or presence)  
• Geographic area defined  
• Agenda with five goal areas adopted and communicated  
• No goal area reflecting social, emotional and safety needs  
• No common messaging established | • New goal area adopted to include social, emotional, health and safety outcomes and indicators  
• Common messaging in place                                                                                       |
| **Shared Measurement**            | • North Star set: By 2026, increase the percentage of students graduating college and career ready from 34% to 90%  
• Some goal-level outcomes and indicators present and/or being discussed  
• No adopted dashboard; all academic data  
• No baseline report produced | • Additional data brought forward in meetings (early literacy, college-going, and safety)  
• Dashboard of exploratory indicators developed and presented to seed future discussions  
• Goal for Baseline Report: Fall 2017                                                                                           |
| **Mutually Reinforcing Activities** | • Partners at the table and establishing metrics/priorities  
• Kindergarten Readiness partners present  
• College and Career Readiness partners present  
• Partners identifying possible joint grant opportunities  
• Action Plans are not in place for active CANS  
• Not all collaborative action networks active | • Kindergarten Readiness CAN: Priority indicator set, targeted neighborhoods defined and starting to align activities, action plan by May 2017  
• College and Career Readiness CAN: Common definition, reviewing indicators/data analysis, action plan by Fall 2017  
• Data CAN: Beginning to assess availability of data identified in exploratory dashboard |
### Continuous Communication

- Partners at the table and attending regularly scheduled meetings (monthly for action networks and bi-monthly for Leadership Table)
- Meetings being documented and notes shared
- Web site and base communications materials in place
- **Web site outdated**
- **Communications limited to meetings**

### Backbone Support

- Backbone support present and anchored by district
- **Staff not dedicated**
- **Unstable funding**

<table>
<thead>
<tr>
<th>Continuous Communication</th>
<th>Backbone Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Partners at the table and attending regularly scheduled meetings (monthly for action networks and bi-monthly for Leadership Table)</td>
<td>• Backbone support present and anchored by district</td>
</tr>
<tr>
<td>• Meetings being documented and notes shared</td>
<td>• <strong>Staff not dedicated</strong></td>
</tr>
<tr>
<td>• Web site and base communications materials in place</td>
<td>• <strong>Unstable funding</strong></td>
</tr>
<tr>
<td>• <strong>Web site outdated</strong></td>
<td></td>
</tr>
<tr>
<td>• <strong>Communications limited to meetings</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Kindergarten Readiness CAN

The launch and facilitation of Collaborative Action Networks should result in using data to drive collective action. A consistent, but flexible process guides the partners to adopt core and contributing indicators, develop action plans, and collaborate to advance the priorities outlined in the plan. Those priorities are the partner’s theory of action for moving the indicators in the desired direction. Over time, the partners align their approaches to support the indicators both individually and collectively. Constant monitoring and a commitment to continuously improve leads to organizational and systems improvement.

**Kindergarten Readiness CAN**

Between August and December 2016, Vicki and I facilitated five Kindergarten Readiness CAN meetings. We brought data into the discussions and used one geographic visualization of data (Exhibit 6) to focus the partners on improving the reading readiness of young children in three high-poverty neighborhoods—Eastside, Crown Heights, and Libby Lake—with extremely low third-grade literacy rates. The partners identified three strategies for improving the kindergarten readiness of Oceanside’s youngest children: 1) Educate and
engage parents/families, 2) Build community ownership, and 3) Increase access to early literacy.

Exhibit 6: Oceanside Neighborhoods with Low Levels of Third-Grade Literacy

Through our leadership and facilitation of meetings, the partners developed messaging to parents reinforcing the importance of reading, talking, and playing with their young children; a flyer with reading tips for families; and a survey to learn more about child care attendance, family reading behaviors, and opportunities to support parents in developing the kindergarten readiness of their young children. The partners set a goal to collect 500 surveys through their neighborhood-based networks and facilities within the three neighborhoods by mid-March 2017. The results had not been analyzed in time for this capstone, but will be used to inform next steps for aligning the partners’ resources and activities to support families with young children and to build their capacity to prepare their children for kindergarten.
The College and Career Readiness CAN, although moving at a slower pace, developed and adopted a common definition of college and career readiness under our leadership:

All Oceanside students will graduate college and career ready. Graduates will be prepared with the knowledge, skills, and drive to successfully plan and pursue an education and/or career path that aligns with their personal goals and empowers them to be responsible members of a diverse and evolving society.

I presented the draft data dashboard (Appendix 7) including possible college and career readiness indicators to the partners in the January 2017 meeting. Although continued work needed to be done to define “career readiness” indicators, they prioritized three of the academic indicators as a starting point for deeper data analysis and ongoing discussion. The three indicators included:

1. Increase the percentage of graduates who met A-G requirements, California’s “college-ready” coursework,
2. The percentage of eleventh grade students proficient in English Language Arts and mathematics, and
3. The percentage of graduates who completed one or more Advanced Placement, career and technical education, and/or dual enrollment courses.

The CAN’s next steps entail collecting, disaggregating, and analyzing the available data, which is planned to occur before the end of summer 2017. We were overly ambitious to believe we could have an action plan in place by year end of 2016, but projected a plan would be developed by the CAN partners before the end of the 2016/2017 academic year.
The Leadership Table and Inaugural Retreat

Igniting urgency and inspiring shared ownership of The Promise’s long-term sustainability was our primary goal with the Leadership Table. Although I planned and helped facilitate the bi-monthly Leadership Table meetings from August through December 2016, they were mostly focused on reinforcing the collective impact framework, reporting out progress of the Collaborative Action Networks, and asking for support from the leaders as needed.

Interviews with several Leadership Table members, as well as discussions with the CANS, reinforced that The Promise partners, although committed, did not all share the same sense of urgency and ownership in advancing and sustaining the work. Additionally, our current backbone capacity was already strained and limited in perspective because Vicki and I alone guided the strategy, planned the agendas, and facilitated the meetings. To relieve some of the pressure and to get additional thought-partnership to the table, I recommended we move to a co-chair model for the Leadership Table and the CANS. I also advocated that we evolve the current common agenda to include a sixth goal area focused on the safety, health, and well-being of students as data from the California Health Kids Survey, plus the widely-acknowledged challenges of poverty and gang activity, reinforced the need for collaborative action around such root-cause issues. Although we introduced a draft dashboard of core indicators (Appendix 7) to the Leadership Table at their December 2016 meeting, we planned for ongoing data analysis and discussion to take place for the first half of 2017.

We hosted The Promise’s inaugural retreat on February 15, 2017. More than sixty cross-sector individuals representing The Promise’s Leadership Table and the CANS, The Foundation board, OUSD’s leadership, staff and school board members, parents, and
students attended the event. I planned the agenda (Appendix 6) and facilitated the day, designing the day to build urgency and inspire shared ownership of The Promise’s vision amongst the partners. The retreat was one important step in moving the partners from viewing The Promise as “Duane’s vision” or “the district’s initiative” to “our vision and the community’s initiative.” I shared some additional academic performance data and celebrated the progress of the partnership (See Appendix 8 for retreat PowerPoint).

I intentionally constructed the agenda to elevate the social, emotional, safety, and health issues affecting Oceanside’s students and families. The Oceanside Police Department presented information about the status of violent crime, gang activity, and youth involvement in gangs. A panel of health and human service agency leaders shared information about the urgent needs they were addressing with students and families including suicide prevention, substance abuse intervention, parenting support, and relieving food insecurity/home instability. At the end, I proposed the sixth goal area—Safety, Health & Well-being—to the group which received widespread support. We used a “voting with dots” process to identify the order of launching any future CANS. The Safety, Health & Well-being goal, although not yet officially adopted by the Leadership Table at the time of the retreat, received the most support (Table 4).

Table 4: Retreat Participants Votes for Future CAN Launches

<table>
<thead>
<tr>
<th>Goal Area</th>
<th>Votes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety, Health &amp; Well-being</td>
<td>56</td>
</tr>
<tr>
<td>3rd Grade Literacy</td>
<td>31</td>
</tr>
<tr>
<td>9th Grade on Track to Graduate</td>
<td>15</td>
</tr>
<tr>
<td>Postsecondary Completion</td>
<td>1</td>
</tr>
</tbody>
</table>
We incorporated student voice throughout the retreat day, with students actively participating in table discussions. Ten students spoke to the group about what they wanted their community to know about their goals, their schools, their struggles and what it was like to grow up in Oceanside. We received a 75% response rate on our retreat evaluation. One hundred percent of the respondents said they “agree or completely agree” that the day helped them better understand the needs of the community and feel more connected to The Promise (Exhibit 7). The day was long, but attendees reported feeling invigorated and greater urgency in coming together for Oceanside’s students. Overall, The Promise team and Leadership Table viewed the day as an important success and positive step forward.

Exhibit 7: Summary Results from Retreat Survey
ANALYSIS OF EXECUTION

In 2012, Hanleybrown et al. proclaimed, “As much as we have tried to describe clear steps to implement collective impact, it remains a messy and fragile process” (p. 8). My experience in Oceanside proved true to their proclamation and was compounded by the fact that The Promise was so deeply connected to a resource-strained school district and a fledgling foundation. Thus, advancing and sustaining The Promise required dedicated time and effort to ensure the district and The Foundation were taking the necessary steps to stabilize capacity, acquire expertise, and secure adequate financial resources. This also made it impossible to focus exclusively on supporting the collective impact initiative. Adding to the complexity, tension within the district about The Promise and its use of already limited resources led us to constantly evaluate whether fighting to maintain a district-anchored backbone was even in the best interest of the community regardless of how innovative and possibly trailblazing it might become for the sector.

Overall, I felt positive about the progress we made with the tangible components of my strategic project connected to OUSD and The Foundation. We had visible products such as the adopted vision, mission, and values (Appendix 4) and a draft strategic plan (Appendix 3) that we could hold up as evidence of progress. The challenge was that they were only the starting point for the real change that needed to take place within both structures. The development of OUSD’s mission, vision, and values moved forward with ease because the executive leadership team was ready to make it a priority and shared the sentiment that clarity in direction was needed. Elevating and incorporating the quality work that had already occurred in the district also simplified and accelerated the adoption process. It was one of many times throughout my residency that I witnessed the enormous value of listening carefully and the power of honoring the work of quality people in the system.
Unfortunately, the rollout of the vision, mission, and values got consumed by the projected $17 million budget crisis and the restructuring of the Educational Support Services department. As much as we tried to map out a thoughtful plan for communicating the new direction and leveraging the multiple crises of declining enrollment, low academic performance, and budget shortfalls to create urgency for the restructuring, conversations repeatedly came back to minimizing the presence of The Promise as part of OUSD. Interest groups and some factions of district leadership who were focused on short-term solutions, did not see how The Promise fit as a more innovative approach to district transformation and addressing persistent achievement gaps. In fairness, results from their investment in a consultant and assigned capacity were not evident and just beginning to emerge.

Although clarifying OUSD’s strategic direction was critically important for the district’s board and staff, its inclusion in my strategic project was to reduce confusion and frustration about The Promise. We had originally planned to provide joint presentations to unveil the district’s new direction and to share the progress of The Promise. However, the escalating budget and political pressure on Dr. Coleman and the leadership team led us to adjust the timeline. It was a deferred opportunity to deepen understanding about how the community was coming together to better support students and their families. Coming out of The Promise’s retreat, we had examples of collaborative grants underway to benefit Oceanside’s most at-risk middle school students and partners aligning to support early literacy in the highest poverty neighborhoods—all resulting from The Promise breaking down the walls between school and community.

Entering my residency, I did not anticipate becoming so heavily involved with The Foundation. Yet, like the district, it was integral to advancing and sustaining The Promise. It was also on the verge of crumbling. The largely grassroots board was losing momentum after
too many months without direction. Attendance at board meetings was inconsistent and continued to wane from July 2016 to February 2017. Many of the board members interviewed expressed confusion about the Foundation’s purpose, questioning the board’s composition and elevating concerns about its ability to raise significant resources. In addition, the Foundation’s board president, Vu Nguyen, stumbled into the leadership role after the founding board president resigned due to personal circumstances and was learning in the moment.

The planning sessions with the executive committee were only minimally helpful as strategic planning and development planning were new to the majority. I worked to educate and draw out information in the short time we had together. Feeling the urgency, I went against what I know to be best in strategic plan development and drafted the bulk of the plan based on intuition and my experience in leading, creating, and supporting nonprofit organizations. Although the plan provided the necessary direction for The Foundation and sparked renewed interest with some key board members, the process elevated that the board needed to be reconstructed and revitalized. Thus, based on its fragile condition, it was clear that Dr. Coleman’s financial and political pressures about The Promise would not be relieved by The Foundation in the near term.

Assessing our “success” in advancing The Promise was harder to define because meetings were taking place, people were showing up, and progress appeared to be happening, most notably, in the Kindergarten Readiness and College and Career Readiness CANS. The Promise retreat was paramount as it brought the collaborative partners together in a way that facilitated deeper understanding, commitment, and connection to their collective work. The extremely positive responses on the evaluation validated that it was well received and achieved what we had intended. Most importantly, it broadened the
conversation and the Oceanside Promise’s agenda beyond traditional academic measures of student success. It also set the stage for expanding community ownership and accountability to the broader measures that would emerge through future data analysis and discussion at the Leadership Table and within the CANS. The movement to co-chair leadership structure was also a strategic move I made toward shared ownership of The Promise and its long-term sustainability.

The internal structures for collaboration and capacity-building never reached the level of priority that I had hoped during planning of the strategic project. The eight-member, in-district Data Culture and Competence Team had met three times at the writing of this capstone. They had co-developed a clear purpose, defined their desired culture and outlined a scope of work. Their work was just beginning and I planned to slowly transition leadership of the meetings to the team over the final months of my residency so that the work carried on without me. The team was energized by our collaborative efforts to transform the culture and use of data, but was also pulled in many directions. Thus, identifying a primary leader would be important to sustaining their efforts to complete the defined scope of work and in transforming district culture and data-use practice.

Our overall progress and success can be attributed to many factors, but strong relationships is the common theme. First of all, Dr. Coleman, Vicki, Vu, and I worked extremely well together. We had deep levels of trust and respect for each other almost immediately, and believed in the power and potential of The Promise. The three of them were motivated by the students and families they personally encountered in their various roles over many years working in the district. Dr. Coleman’s unwavering commitment to The Promise and the kids of Oceanside was inspiring to us all. He also gave us great latitude to plan and execute as needed to keep The Promise and The Foundation moving forward. In
addition, he continued to explore opportunities for statewide and national support of the
backbone capacity. His persistence in reaching out to leaders statewide about The Promise
and the school district’s role as the backbone support had even attracted the attention of
Peter Senge, MIT professor and systems leadership guru, who arranged for him to meet with
a member of FSG, one of the original framers of collective impact, in late March. Although
his many meetings had yet to result in any significant investment in The Promise, Dr.
Coleman continued to have conversations, seeding relationships, and building a cadre of
champions and advisors.

Another factor contributing to our collective success was the powerful partnership
between Vicki and me. It was serendipitous that we ended up being brought together to lead
The Promise. It is also difficult to pinpoint why we ended up falling comfortably into our
co-leadership roles. Recognizing the importance of The Promise to Dr. Coleman and the
community, despite no practical experience in collective impact, we knew we were charged
with figuring out how to keep the collaborative work from falling apart as the consultant and
other key staff transitioned out of the district. It was quickly apparent to me that Vicki was a
brilliant educator. In fact, working with her was one of the most fulfilling aspects of my
residency. I learned from her and she learned from me. We shared similar views on district
transformation, but constantly challenged each other’s thinking. Most importantly, we
worked collaboratively to plan and lead each meeting with The Promise partners with as
much fidelity to a framework with which we had limited experience and understanding.

Time was the less tangible contributor to the success we encountered. Despite
concerns and confusion about The Promise, OUSD’s board and leadership team were
willing to give us a little time to demonstrate its potential. Dr. Coleman had their respect and
Vicki and I had their confidence to build toward a more sustainable model that was less
dependent on OUSD. The work I was doing within the district was adding value to the internal system by providing direction and, in presenting to the board in mid-January 2017, I shared how what we were doing was strategic and intended to make the systems of support for students inside and outside the district better. Vicki and I were bringing new energy and innovative thinking to OUSD while building important connections with the community through The Promise. Of course, the budget crisis increased pressure on the board and the executive leadership team to continually evaluate (and often defend) The Promise’s existence, which leads us to our challenges.

Throughout our efforts to keep momentum, the school district’s dire financial condition and the fragility of the backbone’s existence weighed heavily on us. The strain reached beyond human capacity, as we had no budget to support the meetings, more sophisticated communications, or strategies emerging from the CANS. We explored engaging the United Way as the backbone support, keeping the capacity in the district, and transitioning it to The Foundation. Each option had both financial and political ramifications. Keeping it within OUSD would provide the greatest stability, with Vicki gaining comfort in the collective impact approach. However, the district’s leadership recognized her talent and had additional plans for her in service of OUSD’s new direction. As thought-partners and allies, Vicki and I had concerns about the feasibility of one person being able to support the Leadership Table and three CANS, not to mention other district-related responsibilities.

Thus, the prospect of a “dedicated backbone” remained a real and relevant tension throughout my residency. As outlined in this capstone, the backbone capacity and its leadership has the potential to make or break a community-wide partnership. Giloth et al. (2014) gathered from their research with collective impact leaders from across the nation
that “selecting or creating a backbone organization with full-time, independent staff to coordinate the activities is paramount to an initiative’s success” (p. 9). Those activities include everything from guiding strategy and generating funding to managing data collection and building public support. This definitely did not exist within OUSD and would continue to be underfunded and not dedicated under the current financial and political conditions.

As I started working with The Promise team, I quickly recognized that I was partnered with life-long educators who were deeply committed to the district and its students. Each had taught and some were administrators with an average of 25 years of experience in the education field. The depth and breadth of educator experience on The Promise team could be viewed as an incredible asset in a cradle to career collaborative like The Promise. The fact that it was the only experience on the team also made it a weakness. As highlighted by my experience and the Review of Knowledge for Action, coalition-building, and collective impact in particular, requires profoundly different skills and expertise. In addition, each of the district staff assigned to The Promise from inception had additional in-district responsibilities. Sooner than later, the backbone capacity of The Promise must become adequate, dedicated, and with the requisite expertise if it is to reach its full potential for sustained social impact.

In reflecting on my contribution to advancing and planning for the sustainability of the Oceanside Promise, I feel I brought strategy, expertise, and capacity-building to my strategic project, the organizations with which I worked, and my colleagues. Furthermore, navigating across sectors was familiar and comfortable territory for me. I was inspired by Dr. Coleman’s passion for helping kids and families in Oceanside and his aspiration of The Promise bringing the community together to share accountability in their success. As I began working with Dr. Coleman, his executive leadership team, Vicki, and Vu, I quickly gained
respect for them as educators, advocates, and leaders. I wanted to help them all be successful and ultimately leave them on more solid ground.

I think one of my leadership strengths is making sense of chaos and ambiguity. There was a lot of activity in motion as I entered OUSD, but much of it wasn’t grounded in strategy and structure. Due to my background in nonprofits, philanthropy, and consulting, I could easily support the district and The Foundation to define their strategic direction. I also attempted to infuse greater discipline in planning before acting. Although I am comfortable working in messy and uncharted spaces, I also know the value and importance of a solid, but flexible roadmap to guide direction and maintain focus. OUSD’s vision, mission, and values and The Foundation’s strategic plan provided the needed structure and direction.

One of my personal goals in residency was to build the capacity of the people I worked with so that the work was sustained long term. The majority of my time was spent with Vicki, Vu, and Dr. Coleman. As I learned from each of them, I also sought to teach them what I knew about nonprofits, community-building, and strategic planning. As we worked side-by-side to advance The Promise, I shared my experience and perspective and involved them in the planning of meetings and activities and the development of strategy. Most often, I served as their thought-partner and champion, providing encouragement and support as they assumed greater responsibility in their roles within OUSD, The Foundation, and The Promise.

The most significant way that I contributed to any struggle we had with advancing and sustaining The Promise was getting caught up in trying to maintain the backbone capacity within the district. The internally focused discussions drew our attention to creating clarity in direction for OUSD, managing through the reorganization, and justifying The Promise as a valuable investment. With the backbone capacity anchored in the district, it was
nearly impossible to protect it from the internal politics, making it vulnerable to changes in leadership and shifting political conditions. I recall one day sitting at my desk after “clearing out The Promise office” became a priority due to escalating budget concerns and political pressures. I remember thinking, “Where would our priorities be if we weren’t sitting inside the system?” The answer was that we would be focused on how to bring the community together to better support the social, emotional, academic, and safety needs of Oceanside’s students and families. We would care about the success of OUSD, but it would not detract from the large-scale impact we were striving to achieve through collective impact because the backbone would be independent of the internal strife. This reinforced the importance of community-wide support of The Promise’s sustainability.
IMPLICATIONS FOR SELF, SITE, AND SECTOR

Implications for Self

I entered my residency with OUSD on the verge of significant change. The unexpected circumstances of the lead consultant leaving, budget shortfalls, and organizational restructuring opened the door to a new set of personal and professional growth opportunities. I actively led and influenced the direction of a school system, a foundation, and a collective impact initiative. My strategic project stretched me in ways that I had not anticipated as I learned to navigate the unfamiliar and often perplexing public school district environment. Most often leading from behind, I shepherded my colleagues and the community partners who comprised the Oceanside Promise on their journey in collective impact.

The exit of key players who had laid the groundwork and brought technical expertise to the Oceanside Promise, as well as the entrance of Vicki Gravlin, OUSD’s director of community engagement and innovation, created a period of stagnation and uncertainty in roles and direction. I had to sit, sometimes uncomfortably, with the realization that I had neither the positional authority nor the collective impact expertise to summarily move The Promise forward. Settling into the transition, I had time to further reflect on how I wanted to contribute, learn, and lead throughout my residency and in executing my strategic project.

As a new entrant into the inner workings of a school district, I committed to showing up as a learner. I wanted to absorb as much as I could about the community, collective impact, and the district during my ten-month residency. I also wanted to try on new ways of showing up in the work. Marian Wright Edelman once stated, “Learn to be quiet enough to hear the genuine within yourself so that you can hear it in others.” Thus, I took the stance that I would listen intently, ask more questions for better understanding, and
in the words of Heifetz, “stay curious” about what I was hearing and seeing—good and bad—along the way.

A listening approach proved to be a powerful way to build trust and cultivate relationships. I connected with both district staff and community partners early in my residency and asked probing questions about the community, the school district, and The Promise. These conversations provided insight into the needs of Oceanside’s students and families, the school district’s reputation, and how well the various stakeholders understood and valued The Promise. More importantly, they helped me get to know the people who make up Oceanside and dedicate their lives to serving its schools, running its government, businesses, and nonprofits, and giving back to the community. It was a relationship-building experience as much as a learning experience. My experience reinforced that fostering strong, trusting relationships is the work of collective impact and of building a more connected community.

As Vicki and I ramped up our knowledge about the short history of The Promise, the theory of action provided by StriveTogether, and collective impact in general, mutual respect and a commitment to “figure it out together” quickly emerged. Although we fell naturally into co-leading The Promise collective impact initiative, I personally held back from heavily driving the work out of respect for her and her newly created role. Uncertain about my future connection to The Promise, my interest was in building the capacity of the district staff and its partners to guide and sustain the collective impact initiative. We were abruptly and unexpectedly brought together and ended up making each other and the work better. Vicki and I became thought partners, mentors, and co-leaders in our efforts to respect the collective impact framework, while maintaining momentum and setting the school district and The Promise on distinct, but aligned paths.
Although there is an immense amount of information available about the collective impact framework and its pre-conditions, five conditions, and phases of implementation from exploring to achieving a proof point—*the learning is in the doing*. The field speaks to the importance of using data early and often, but little exists to show those immersed in the work what effective data use looks like in practice. I was frustrated at my lack of experience in using student and community data to elevate root-cause issues and to drive action.

However, I quickly learned from talking to others engaged in collective impact and in working with our partners that I was not alone. I embraced my place as a “learner” and relied on my personal and professional experience and intuition to guide our planning while leading discussions about data both inside OUSD and with The Promise team.

Untangling the confusion about OUSD’s strategic direction and its connection to The Promise often felt like a distraction from advancing the collective impact initiative. But upon reflection, it was critically important in creating shared ownership in The Promise’s success and sustainability, and support for the district’s ongoing involvement. Often times, I engaged in areas where I was comfortable, such as leading the development of a strategic plan for The Foundation and working with the school district’s executive cabinet to define the district’s strategic direction. Supporting them to clarify the vision, mission, and values at a time when budget issues; declining enrollment, safety concerns, and persistent achievement gaps plagued the district stretched my thinking about school system transformation and provided a unique opportunity to learn from highly-skilled and seasoned district leaders.

Although I set out to help advance and sustain a district-anchored collective impact initiative, I was continually confronted with financial, political, and capacity challenges. The projected $17 million financial deficit made it increasingly difficult to build a case for why the backbone support should remain within the district, especially since it was not widely
viewed as integral to district transformation or improved student outcomes. Recognizing that the assigned staff had limited skill in advancing the work and were not "fully dedicated" to The Promise as they had multiple responsibilities for the district and the collaborative, raised significant concerns about long-term quality and viability. In addition, culture was a major obstacle that was often attributed to the financial situation, but, in listening to "the song beneath the words," anchoring The Promise inside the district and embracing its unique potential for student impact seemed to be outside of the accepted conceptual frame of many educators and some board members within OUSD (Heifetz & Linsky, 2002, p. 65).

To Dr. Coleman’s credit, we acknowledged the challenges, but continuously explored how to make the district-anchored backbone viable, at least for the near term.

Embracing the teachings of Alinsky (1971), I was reminded throughout my residency to "start from where the world is, as it is, not as I would like it to be" (p. xix). This simple reflection guided me as I sought to lead, support, and understand OUSD, The Foundation, The Promise, and the complex needs of the students and families in the community. There were moments when I could see where we needed to go and the incredible potential of The Promise. Yet, the current state with limited resources, capacity, expertise, and direction reminded me why social change takes time and patience. When Vicki and I first started working together, she shared that she didn’t like the ambiguity of community-based collaboration. She wanted a clear plan of where we were going. It made me smile because I enjoy the messy, often meandering process of bringing people together and shepherding them in a common direction. In doing so, you have no choice but to accept the world as it is, and to be comfortable in your own vulnerability of not fully knowing how to get from where you sit with your partners to where you want to be two, five, or ten years down the road.
Implications for Site

Dr. Coleman’s vision of the Oceanside Promise bringing the community together to share responsibility and accountability to every graduate becoming ready for college, career, and life is bold and innovative for a public school system leader. The decision of OUSD’s executive cabinet and school board to provide district-anchored backbone support for a collective impact initiative is trailblazing as well. This district-driven seeding and support also reinforces that the creation and advancement of such cradle to career cross-sector collaborations are context specific and emerge in communities in different forms. In Oceanside, the superintendent had the vision, the convening power, and the ability to direct resources to make it happen.

This capstone explores some of the challenges that arose from this structure with respect to shared ownership in The Promise’s vision and its long-term sustainability. Significant effort was exerted over the eight months of my strategic project’s execution to increase The Promise partners’ ownership and investment in the collaboration and its backbone capacity. That said, the relationship and trust-building that facilitates shared ownership and social impact takes time. According to Giloth et al. (2014), “The early stages of multisector collaboration carry high risks and high potential rewards. Success requires time, patience, transparency and a lot of conversations” (p. 12). The Promise partners have just begun to collaborate, thus, they have yet to experience the small successes and early wins common in collective impact initiatives that comes from working together differently.

The school district has provided nearly three years of support to bring community partners to the table. The benefits, as highlighted in the Evidence and Analysis sections of this capstone, are just beginning to emerge. Cross-sector leaders are coming together because of OUSD’s leadership and their willingness to be the district’s partners in ensuring
Oceanside’s students are socially, emotionally, and academically prepared to succeed. At this point, The Promise is sure to falter, and possibly fail, without OUSD’s continued investment. If it does falter, the partners will not realize their real potential to improve the lives of Oceanside’s students and their families and the district will be left to, once again, figure out how to support students on its own. An approach that has not worked well to date.

Due to the complex, ongoing needs of students and families, the infancy of The Foundation, and the cultivation of partner relationships still needed, I recommend that OUSD continues to invest resources and capacity to stabilize and sustain The Promise for another year. The district’s continued leadership and investment will allow The Foundation board to get organized and activated, and The Promise partners more engaged. Ultimately, the backbone capacity should be funded by the community and transitioned to the Foundation—or another stable entity—to ensure its long-term sustainability. By anchoring the backbone another year, the district can leverage the internal incubation of The Promise in the following ways:

- **Build its internal capacity** to be more data-driven and improvement-oriented, fostering a culture of continuous learning and evidence-based decision-making resulting in higher-performing systems inside and outside the district;

- **Lead the community in redefining student success beyond academic measures exclusively**, focusing collective efforts to support the social, emotional, health, and safety needs that prevent students from reaching their full potential;

- **Break down the barriers between schools and community, extending shared ownership and accountability of student success to the community,**
leading to a collective commitment to ensure all students graduate ready to
succeed in college, career, and life;

- **Collaborate with civic and nonprofit partners to attract new financial**
  **resources** to support the social, emotional, safety, health, as well as academic
  needs of Oceanside’s students and families;

- **Engage the students and families most impacted to be part of**
  understanding the issues and in co-developing the solutions, leading to
  more culturally relevant and sustainable change in the community.

OUSD’s financial condition presents a difficult, but not unsurmountable, challenge
for ongoing support of a district-anchored backbone. Undoubtedly, by continuing to invest
in the backbone capacity of The Promise, Dr. Coleman and his small contingent of internal
supporters are pushing against a political tide that does not see The Promise as a valuable
investment for school district resources. In this context, The Promise, as a unique approach
to community engagement and system improvement for a public education system,
challenges the mindsets of traditional educators, school board members, taxpayers, and
community partners about how school district resources (i.e., time, money, and expertise)
should be invested. Its sustainability requires innovative education leaders who are willing to
imagine and invest in a new way of bringing the community into their work to better meet
the needs of students. That said, The Promise and its collective impact approach, may be too
cutting edge for this public school system, at this point in time.

Ironically, the impetus for The Promise’s creation was Dr. Coleman’s recognition that
the needs of OUSD’s students and families were far too complex for the education system
to solve on its own. The urgency in its creation was in seeing too many students continue to
struggle with issues of poverty, gang violence, substance abuse, depression, and instability in
the home—all of which negatively impact student academic achievement and attainment. In
addition, the current education system needs new and innovative partnerships with business,
government, and nonprofits to effectively prepare students for college and career. Thus, the
people who are most at risk of losing out if the district chooses not to invest in The
Promise’s backbone capacity for another year are Oceanside’s students and their families.

**Implications for Sector**

Educators today are expected to help each student reach his or her full academic,
social, and emotional potential. In addition to teaching students, they are social workers,
college and career advisors, mentors, advocates, and more. To meet expectations and
achieve ambitious goals, districts are expected to raise supplemental funds, engage families,
and partner with business, nonprofits, and higher education while continuously improving
the quality of education being delivered. Thus, the emergence of community schools,
Promise Neighborhoods, wraparound approaches, and collective impact.

The overall inability of the sector to effectively prepare every student for college,
career, and life should signal that school systems must be creative and innovative in how
they approach their ongoing efforts to educate, support, and prepare students. They cannot
be expected to succeed alone, but they also must be open to new ways of collaborating and
engaging with cross-sector partners. Collective impact anchored in a public school district, if
fully embraced, may prove to be a powerful approach to better meet the needs of all
students by bringing focus, discipline, and greater alignment both inside the education
system and within the community.

To support such trailblazing efforts across communities, however, there are several
ways in which the sector overall must evolve to create the conditions for educators to lead
differently and to facilitate the shared ownership of student success fostered by collective impact. Those conditions include supporting district leaders to lead in community change and be catalysts for bringing cross-sector partners together; leading the evolution of how student success is defined beyond academics and how it will be measured; expanding the circle of ownership and accountability to improving the redefined measures of student success; and valuing and acquiring the unique skills and expertise required to improve the education system and engage the community in the data-informed, continuous learning approach of cross-sector collective impact.

_Elevate the Role of District Leaders to Community Leaders and Change Agents_  

District leaders have a valuable perspective to contribute to community-wide discussions about the economic, social, and educational vitality of communities. As leaders of the systems fueling the pipeline of young adults entering college and career, they are often best positioned to bring diverse groups together, shape community agendas, and engage multiple sectors in supporting student success. However, in my experience, they often view such pronounced leadership roles as outside of their responsibilities and spheres of influence, leaving it to others from government, business, and philanthropy to take the helm and invite them to the table. The Promise is an example of a superintendent identifying a leadership gap in the community and leveraging his reputation and positional authority to convene diverse stakeholders in the interest of students, families, and the broader community he serves.

Developing district leaders to be proactive community leaders and change agents would require the education sector to evolve its thinking, and that of its constituents, about the district’s role in cross-sector collaboration and how best to invest public dollars to
improve student outcomes. Collective impact provides an approach where district leaders can play a leadership role in improving a community’s economic, social, and educational outcomes. Instead of waiting to be asked, or in some cases coerced, to the table, proactive education leaders should be supported in convening cross-sector partners in the interest of their students and the long-term prosperity of the greater community. Investment of district resources to convene and lead, and build backbone capacity, should not only be supported but encouraged in communities in need of leadership to facilitate community-wide problem-solving and cross-sector coordination.

The overall education sector has a role and responsibility to challenge the mindsets of people inside and outside the system to support educators in cross-sector leadership roles. The sector must also shift to view the allocation of public funds to build backbone capacity and to sustain cross-sector collaborations as an investment with the potential for significant and groundbreaking returns. Those returns may be in the form of substantial grants, in-system innovation and improvement, shared community ownership of student success, and ultimately, increased numbers of students graduating prepared for college, career, and life. For example, after The Promise’s full-day retreat with district leadership, the community partners, and students, two partners took the initiative to apply for grant opportunities that would benefit OUSD’s students and families. One grant, if successful, will bring several hundred thousand new dollars over multiple years to the nonprofit agency and the school district to better serve students at one of the community’s most struggling middle schools.

Of course, district-anchored collective impact efforts must also take great care to ensure ownership, accountability, and backbone sustainability are shared by the community. Collective impact is designed to expand the circle of responsibility for student success to the collaborative partners. When the district is the convener, however, it may give the
impression that the district is asking people to the table to help it achieve its goals. This is partially true, but the needs of students are too complex for one organization to address alone and it takes multifaceted approaches from the various partners. In truth, they are all there in service of students, not any one organization. Fostering shared ownership has been an ongoing challenge for OUSD as partners frequently ask the district-anchored backbone team, “how can we help you?” when the questions should be, “how can we collectively better serve Oceanside’s students and how can I align my work to what we prioritize together?” One way OUSD is addressing this challenge is by establishing a co-chair leadership structure within the Leadership Table and the CANS where a district representative is partnered with a leader from government, nonprofit, or business—or relinquishes the chair position completely. Naturally, the district remains accountable to student success as well, but expanding the measures of success to include social, emotional, safety, career, and academic, amongst others, provides greater opportunity for others to see themselves in the collective impact work and become more likely to embrace shared ownership and accountability.

_Lead the Way in Redefining the Measures of Student Success_

As the nation moves beyond No Child Left Behind and states prepare to meet the requirements of the Every Student Succeeds Act (ESSA), there is a powerful opportunity for the education sector and district leaders to redefine student success and how it will be measured. Although ESSA still requires states and local education agencies to be accountable to closing achievement gaps, it opens the door for broader measures of student success beyond just academics. Educators can lead the charge in defining what the portfolio of social, emotional, academic, and career measures should include and the best way to assess progress in states, communities, and schools. The Promise’s expansion of its common
agenda to include safety, health, and well-being is an example of educators leading a community to expand traditional cradle to career academic measures. This strategic move brings social, emotional, safety, and health metrics into the Oceanside community’s definition of student success. In addition, the educator-facilitated discussions about career readiness as part of The Promise’s collective impact initiative are engaging cross-sector partners in defining the characteristics of a career-ready graduate, how career readiness will be measured, and how they will collectively be held accountable to such multifaceted measures of student success.

*Expand Ownership and Accountability to Student Success*

Never has it been more important to breakdown the silos between community and schools. The needs of students are too great to operate in isolation. District-anchored collective impact initiatives challenge educators to rethink their definition of community engagement. In creating a cradle to career common agenda, the community becomes an active partner in setting priorities, examining achievement gaps, identifying root causes, evaluating program and strategy effectiveness, and reallocating resources for greater impact.

The more common district approach of hosting a few meetings with community stakeholders, soliciting input into plans, and then retreating into the system to do the work alone is turned upside down with collective impact. Instead, the district’s partners are at the table offering support, aligning activities, challenging assumptions and behaviors, sharing ownership, and learning to improve together. It requires a level of vulnerability that may make many educators uncomfortable. Of course, the partners are equally vulnerable as their programs and strategies are not above reproach. When it is functioning well, the collective impact partnership—with its data-informed, continuous improvement approach—improves all the parties, including the district, that are engaged in the work. The shared measurement
and alignment structure also distributes ownership of student success (i.e., social, emotional, academic, college, career) across the partners who bring their best offerings to support the success of students.

**Embrace and Acquire New Skills and Expertise**

The education sector has experienced the infusion of non-educator expertise and skills from the beginning of No Child Left Behind. From my experience, stories of business leaders turned superintendents, Teach For America recruits, and turnaround wizards have left some educators skeptical about people from the outside coming in to “fix the broken system.” What’s different about a district-anchored backbone is that it is not about people with different skills and expertise coming in to fix or save the system. Those different skills in nonprofit management, philanthropy, collaboration building, community organizing, and/or business—as OUSD experienced during my residency because of my unique professional expertise—are complementary to those of educators. It merely requires respecting and valuing what everyone brings to the table and using that diversity of knowledge and experience to achieve something better for students.

By expanding the portfolio of skills and expertise that are valued and integrated into the education system, new ways of thinking about and organizing the work can occur. For example, The Promise’s use of data spurred the creation of OUSD’s internal Data Culture and Competence Team to align work and to build internal capacity to use data to inform decision-making and continuous improvement. Furthermore, the ability to cross the boundaries of sectors such as business, education, and government requires leadership skills, trust-building, and collaboration facilitation expertise not widely found within traditional education systems. Thus, such skills need to be both developed and acquired within districts and across communities.
Other Conditions for District Success

In addition to the conditions outlined in this section, district leaders interested in providing the backbone support for a collective impact initiative can benefit from OUSD’s experience with The Promise. First of all, it is important to have a clearly articulated vision, mission, and goals for the district which reinforce the importance of cross-sector collaboration and community engagement to address the complex needs of students. A culture that is open to innovative approaches to better serve students and eager to break down the silos between schools and their communities is imperative. District leaders must also believe that their systems alone cannot adequately prepare students for college, career, and life and be willing to learn and improve alongside their partners. They must work diligently to foster shared ownership of their jointly defined measures of student success and extend accountability to include each cross-sector partner.

Furthermore, while collective impact requires special skills and expertise that must be acquired and developed within the district and in the community, it also requires adequate financial investment. The district culture and political climate must view such investments as valuable and necessary to improve student outcomes. As district leaders commit to provide backbone support, placing people with the requisite skills and expertise who are dedicated to advancing the collective impact work and fully funding it for multiple years increases the potential for long-term success and provides the context for learning, capacity building, and improvement both inside and outside the system.
CONCLUSION

Collective impact is a powerful approach to community-wide, cross-sector collaboration. It provides a framework for bringing the community together to share ownership and accountability for the social, emotional, and academic success of students while aligning collective resources to address root-cause issues and persistent achievement gaps. Although unconventional, anchoring the backbone support of a collective impact initiative within a public school district, builds the capacity of those guiding the work (i.e., district staff) to use data to inform decision-making, facilitate aligned action, and continuously improve both inside and outside the system. In addition, in fulfilling the backbone support role, district staff develop new skills and expertise in bridging sectors, breaking down silos between communities and schools, building trust, and fostering shared ownership of student success.

The Oceanside Promise represents what is possible when a district superintendent with a bold vision of every student graduating prepared for college, career, and life leverages the trust and respect he has within the system and in the community to not only imagine, but also initiate a new way of partnering to improve student outcomes. As a career educator and product of Oceanside’s schools, Dr. Coleman recognized that addressing the complex needs of his students and their families would require the support of the entire community.

This capstone documents the journey of a district-anchored backbone team as we facilitated the advancement of a collective impact initiative and planned for its long-term sustainability. The complex nature of the project provided me with the opportunity to learn and lead within a public school district (OUSD), a nonprofit (The Foundation), and a cross-sector community partnership (The Promise). In co-leading The Promise’s advancement, I grew as leader in collective impact and education while making significant strides in building
shared ownership and guiding collaborative action within OUSD and across its partners. Due to my unique professional background and ability to cross boundaries between sectors, Dr. Coleman, his staff, and his community partners also gained deeper understanding about the differentiated leadership skills and expertise that are critical in facilitating cross-sector collaboration and collective impact. My in-district placement also provided insight into how intentional structures for collaboration within the district around the common agenda and shared metrics could accelerate improvement both inside and out. However, due to the timing of my residency, this remains an area for continued development within OUSD and an area for future research regarding the internal and external impact of a district-anchored backbone.

Experts in collective impact encourage communities to select or create a backbone with a dedicated staff within a neutral organization with sufficient resources and expansive skills in leadership, facilitation, communication, fundraising, and data analysis (Giloth et al., 2014; Hanleybrown et al., 2012; StriveTogether, 2011). Assuredly, such constructions increase the likelihood of the partnership’s long-term success. However, in communities like Oceanside, seizing the opportunity to launch a collective impact initiative while meeting all these characteristics may not be possible. It also should not keep unconventional approaches, such as a district-anchored backbone, from emerging. Finally, the context specific challenges (i.e., OUSD’s financial and political pressures) confronted in this capstone should not discourage other school district leaders from pursuing the path of an anchor organization if they, and their community partners, believe the district is best suited to provide the backbone support.
BIBLIOGRAPHY


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APPENDICES

APPENDIX 1: Oceanside Promise Overview

The Oceanside Promise is a community-wide partnership to ensure every student graduates high school ready to succeed in college, career, and life.

The Oceanside Promise brings representatives from education, government, business, nonprofits and our community together to support the social, emotional and academic success of all students from cradle through career. United by a shared vision of success for our students and their families, the Oceanside Promise partners are working to advance the following goals:

By 2026...

- **Ready for Kindergarten**
  Increase the percentage of children ready for kindergarten from 37% to 90%.

- **3rd Grade Literacy**
  Increase the percentage of 3rd grade children who meet or exceed standards in English Language Arts from 32% to 90%.

- **9th Grade On Track to Graduate**
  Increase the percentage of 9th grade students earning a “C or better” in A-G coursework and on track to graduate from 50% to 90%.

- **Graduate College & Career Ready**
  Increase the percentage of college and career-ready high school graduates from 34% to 90%.

- **Postsecondary Completion**
  Increase the percentage of students entering and completing a postsecondary degree or certificate program.

*DID YOU KNOW...

- **37%** The percentage of children entering kindergarten ready to learn
- **32%** The percentage of 3rd graders proficient English language Arts
- **50%** The percentage of 9th graders earning a “C or better” in A-G coursework
- **34%** The percentage of high school students graduating college and career ready

Learn more at OceansidePromise.org
## APPENDIX 2: Strategic Project Planning and Implementation Timeline

<table>
<thead>
<tr>
<th>Entity</th>
<th>Activity</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>OUSD/Promise</td>
<td>Conduct key stakeholder interviews (District leaders and staff, school board members, Promise partners, and community members)</td>
<td>July – December 2016</td>
</tr>
<tr>
<td>OUSD</td>
<td>Facilitate Executive Cabinet Planning Session #1 (Discuss strategy for development of vision, mission, values; leadership approach; and retreats)</td>
<td>October 24, 2017</td>
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<tr>
<td>OUSD</td>
<td>Facilitate Executive Cabinet Planning Session #2 (Vision/mission/values development; coherence with The Promise)</td>
<td>November 14, 2017</td>
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<td>OUSD</td>
<td>Present vision/mission/values to Executive Cabinet</td>
<td>December 12, 2017</td>
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<td>OUSD</td>
<td>Present draft vision/mission/values to Cabinet</td>
<td>January 17, 2017</td>
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<tr>
<td>OUSD</td>
<td>Facilitate Executive Cabinet Retreat (Leading change/adaptive leadership discussion; vision, mission and values adoption; education support services restructure)</td>
<td>January 30, 2017</td>
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<td>OUSD</td>
<td>Develop presentation (rollout) of case for change, vision/mission/values, and restructure</td>
<td>February 2017</td>
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<td>OUSD</td>
<td>Prep Executive Cabinet to present rollout to site administrators and directors</td>
<td>February 13, 2017</td>
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<tr>
<td>OUSD</td>
<td>Executive Cabinet to presentation (rollout) of case for change, vision/mission/values, and restructure to site administrators and directors</td>
<td>February 16, 2017</td>
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<td>OUSD</td>
<td>Support communications director in development of site rollout materials</td>
<td>February – March 2017</td>
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<tr>
<td>OUSD</td>
<td>Site administrators and executive cabinet roll out case for change, vision/mission/values and restructure to school sites</td>
<td>March – April 2017</td>
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<tr>
<td>OUSD/Promise</td>
<td>Convene diverse group (administrators, teachers, counselors and staff) to discuss Promise goals/indicators and alignment of district</td>
<td>March 2017</td>
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<td>OUSD/Promise</td>
<td>Define internal structure of diverse group(s) to align district with The Promise indicators and to support mutually reinforcing activities; schedule regular meetings</td>
<td>April 2017</td>
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<td>Foundation</td>
<td>Develop strategic plan timeline and activities</td>
<td>August 2017</td>
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<td>Foundation</td>
<td>Conduct Foundation board member interviews</td>
<td>August – November 2016</td>
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<tr>
<td>Foundation</td>
<td>Facilitate planning session with Foundation’s executive cabinet</td>
<td>October 17, 2016</td>
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<td>Foundation</td>
<td>Develop and present draft strategic plan to Foundation board president</td>
<td>October 20, 2016</td>
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<td>Foundation</td>
<td>Present draft strategic plan to Executive Committee</td>
<td>November 7, 2016</td>
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<td>Present draft strategic plan to board for feedback</td>
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<td>Foundation</td>
<td>Finalize draft strategic plan</td>
<td>February 2017</td>
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<td>Foundation/OUSD</td>
<td>Convene core board members for ownership of plan implementation</td>
<td>March 2017</td>
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<td>Foundation</td>
<td>Complete development and engagement plan</td>
<td>March – May 2017</td>
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<tr>
<td>Foundation</td>
<td>Evolve board and define capacity</td>
<td>March 2017</td>
</tr>
<tr>
<td>Foundation</td>
<td>Hire capacity and build internal structure</td>
<td>April – May 2017</td>
</tr>
<tr>
<td>Foundation</td>
<td>Mobilize board to execute development goals</td>
<td>May – December 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Review existing materials (collateral, web site, agendas, and action plans)</td>
<td>July 2016</td>
</tr>
<tr>
<td>Promise</td>
<td>Assess progress of the partnership against five conditions/Theory of action including capacity of the backbone team</td>
<td>August 2016</td>
</tr>
<tr>
<td>Promise</td>
<td>Develop draft dashboard of goal aligned indicators</td>
<td>August - September 2016</td>
</tr>
<tr>
<td>Promise</td>
<td>Present draft dashboard to collaborative action networks (Kindergarten Readiness, College and Career Readiness, and Data) for input</td>
<td>October - November 2016</td>
</tr>
<tr>
<td>Promise</td>
<td>Present draft dashboard to Leadership Table for input</td>
<td>December 2016</td>
</tr>
<tr>
<td>Promise</td>
<td>Leadership Table Retreat (Expanded to include all partners, parents and students)</td>
<td>February 17, 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Special Meeting of Leadership Table (Adoption of evolved agenda and core indicator dashboard; co-chair structure; and present Foundation sustainability plan)</td>
<td>March 15 or 22, 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Develop Promise update presentation to report progress to district leadership and staff</td>
<td>February 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Present Promise’s progress and direction to district leadership, directors, interest groups, and site administrators/staff</td>
<td>March – May 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>One-on-One meetings with Leadership Table members</td>
<td>April – July 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Active Collaborative Action Network Action Plans drafted and adopted (Kindergarten Readiness, College and Career Readiness, and Data)</td>
<td>KR – April 2017, Data – April 2017, CCR – May 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Produce baseline report</td>
<td>May 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Determine backbone capacity structure (OUSD/Foundation – anchor/funding)</td>
<td>May 2017</td>
</tr>
<tr>
<td>Promise</td>
<td>Develop Promise neighborhoods (impacted students and families) engagement plan</td>
<td>June 2017</td>
</tr>
</tbody>
</table>
APPENDIX 3: Oceanside Promise/Foundation Strategic Roadmap Summary

The Oceanside Promise is a community-wide partnership to ensure every student graduates ready to succeed in college, career and life.
APPENDIX 4: Oceanside Unified School District Vision, Mission and Values

VISION
All students graduate college and career ready, prepared to be responsible global citizens and ambitious future leaders.

MISSION
We design and orchestrate rigorous and relevant learning experiences to inspire and empower all students.

VALUES
Students First: Our students are our highest priority. What’s best for students guides our decision-making every day.

Respectful Relationships: Strong, respectful relationships are the cornerstone of quality educational experiences. Students and adults are valued and consistently show integrity, compassion, and respect.

Educational Equity: Every student receives the academic, social, and emotional support needed to succeed. Resources are allocated to eradicate persistent achievement and opportunity gaps.

Purposeful Collaboration: We create purposeful and collaborative learning environments that inspire students and adults to achieve their highest potential.
APPENDIX 5: Oceanside Promise Common Messaging

- Oceanside’s long-term economic prosperity and overall quality of life depends on the success of our students from cradle through career.

- Students today are faced with a variety of complex social, emotional and safety issues which affect their ability to be successful in school and life.

- In addition, only one in three of our children are ready for kindergarten, reading at grade level by third grade or graduating from high school ready for college and career.

- The Oceanside Promise is a community-wide, cross-sector partnership to ensure every student graduates ready to succeed in college, career, and life.

- Using a data-driven, continuous improvement approach, we are working together to maximize our limited resources by aligning our activities and improving our practices to better meet the needs of Oceanside’s children, youth, and families.

- [YOUR ORGANIZATION] is involved in the Oceanside Promise because we believe we are much more powerful together than working alone.

- To learn more about the Oceanside Promise and how you can get involved, visit our website at OceansidePromise.org.

Updated 3.23.17
## APPENDIX 6: Oceanside Promise Draft Data Dashboard

<table>
<thead>
<tr>
<th>Kindergarten Ready</th>
<th>3rd Grade Literacy</th>
<th>9th Grade on Track to Graduate</th>
<th>Graduate College and Career Ready</th>
<th>Postsecondary Completion</th>
<th>Safety, Health, and Well-being</th>
</tr>
</thead>
<tbody>
<tr>
<td>By 2028, the percentage of children entering kindergarten ready to learn increases from 37% to 80%.</td>
<td>By 2028, the percentage of students proficient in English Language Arts increases from 52% to 59%.</td>
<td>By 2028, the percentage of students earning a &quot;C&quot; or Better in A-G coursework increases from 90% to 94%.</td>
<td>By 2030, the percentage of graduates who meet A-G requirements increases from 34% to 90%.</td>
<td>By 2028, the percentage of students who earn a postsecondary certificate or degree increases from 40% to 50% by 2030.</td>
<td>By 2028, the percentage of 8th grade students reporting a feeling of at least moderate sadness increases from 20% to 30%.</td>
</tr>
</tbody>
</table>

### Core Indicators

- % of students proficient in ELA on SBAC
- % of students proficient in Math on SBAC
- % of students with 10 or more absences (10% at any point in time)

### Core Indicators

- % of students proficient in ELA on SBAC
- % of students proficient in Math on SBAC
- % of 8th grade students proficient in Math on SBAC
- % of students with 10 or more absences (10% at any point in time)

### Core Indicators

- % of students proficient in ELA on SBAC
- % of students proficient in Math on SBAC
- % of 8th grade students proficient in Math on SBAC
- % of students with 10 or more absences (10% at any point in time)

### Core Indicators

- % of students who met A-G requirements
- % of 12th graders proficient in ELA and Math on SBAC
- % of students who completed one or more AP, CTE, Dual/Concurrent Enrollment Courses
- % of students who graduated on time

### Core Indicators

- % of students who enrolled in a postsecondary program within 1st year of graduation
- % of graduates prepared for postsecondary education (enrolled directly into credit bearing Math/English)
- % of students who enrolled from first to second year
- % of students completing a degree within 6 years
- % of 4th grade cohort earning a postsecondary credential (degree or certificate) by age 24

### Core Indicators

- % of elementary students who feel safe walking to and from school
- % of 9th grade students with a caring adult relationship
- % of 11th grade students experience chronic sadness/depression
- % of 11th grade students who considered suicide
APPENDIX 7: Oceanside Promise Retreat Agenda

Our Vision: Every student graduates from high school ready to succeed in college, career and life.

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
</table>
| 8:00 – 8:30 a.m. | Welcome, Retreat Goals, and Norm Setting  
Vicki Gravina                              |
| 8:30 – 8:35 a.m. | A Shared Vision for Oceanside's Kids and Families  
Dr. Duane Coleman, Oceanside Unified School District |
|                | Student Perspective – What I want my community to know...                                  |
| 8:35 – 9:15 a.m. | Story of Self, Us & Now  
Table Discussion – Relationship Building/Connecting to the Day Activity |
| 9:15 – 9:30 a.m. | Celebrating Our Progress and Moving Toward Impact  
Nicole Magnuson                           |
| 9:30 – 10:15 a.m. | Exploring the “Why?”  
Table Work – Five Whys Activity               |
|                | Student Perspective – What I want my community to know...                                  |
| 10:15 – 10:30 a.m. | Break                                                                                     |
| 10:30 – 10:50 a.m. | Student & Family Safety – Real or Perceived?  
Captain Fred Arreola and Lieutenant Taurino Valdivinos |
| 10:50 – Noon    | What Doesn’t the Data Tell Us?  
Table Work – Asset Mapping Exercise           |
| Noon – 12:30 p.m. | Lunch Break                                                                               |
|                | Student Perspective – What I want my community to know...                                  |
| 12:30 – 1:30 p.m. | Student & Family Health and Well-Being Panel Discussion  
Facilitator: Ken Gonzales, CSUSB  
Don Stump – North County LifeLine  
Lisa Turner – Palomar Family Counseling  
Annette Stamm – Vista Community Clinic  
Marla Yang – City of Oceanside |
| 1:30 – 3:00 p.m. | Organizing for Impact  
Extended Table/Group Activity with Gallery Walk |
| 3:00 – 3:20 p.m. | The Power & Potential of the Oceanside Promise  
Vu Nguyen & Nicole Magnuson                  |
|                | Student Perspective – What I want my community to know...                                  |
| 3:30 – 4:00 p.m. | Reflections and Next Steps  
Vicki Gravina                                 |

February 15, 2017  
8:00 a.m. – 4:00 p.m.  
El Corazon Senior Center
APPENDIX 8: Oceanside Promise Retreat PowerPoint

Bring the Community Together to Support
Every Child, Every Step of the Way

The Oceanside Promise is a community-wide partnership to ensure every student graduates ready to succeed in college, career and life.
By 2026…

The percentage of OUSD students graduating high school ready for college, career, and life will increase from 34% to 90%.

The Promise Goals:
Cradle through Career

Ready for Kindergarten 3rd Grade Literacy 9th Grade on Track to Graduate Graduate College and Career Ready Postsecondary Completion
If I am not for myself, who will be for me?

But if I am only for myself, who am I?

And if not now, when?

~Rabbi Hillel
STORY OF SELF, US, AND NOW

SELF
Tells your story and invites others to be in relationship with you

US
Identifies our commonalities and invites others to join your community

NOW
Creates urgency and invites others to take action

Source: Public Narrative, Marshall Ganz, Harvard Kennedy School

The Five Conditions of Collective Impact

- Common Agenda
- Shared Measurement
- Mutually Reinforcing Activities
- Continuous Communication
- Backbone Support

Source: FSG 2011
Focus, Discipline, Alignment & Impact

- All partners working toward the same goal and measuring the same things
- Cross-sector alignment with government and corporate sectors as essential partners
- Organizations actively coordinating their action and sharing lessons learned

“We are program rich, but systems poor.”

Jeff Edmundson, STRIVE Together

About OUSD

- 23 schools
- 18,500 students
- 2,100 staff

Source: Oceanside United School District
OUSD’s Economically Disadvantaged Outpaces Nearest District Peers by 45% at the Extreme

...Impacting Student Achievement

Source: California Department of Education
OUUSD Students Trail their County Peers in 3rd Grade ELA & 8th Grade Math Proficiency

Source: California Department of Education

---

Source: California Department of Education
Significant Variation in 3rd Grade Proficiency Across Schools

3rd Grader Below Proficient in ELA by Race/Ethnicity and Class
**Current A-G Status Report**

<table>
<thead>
<tr>
<th>Program</th>
<th>On Track</th>
<th>On Bubble</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main</td>
<td>323</td>
<td>97</td>
<td>330</td>
<td>67%</td>
</tr>
<tr>
<td>AABCD</td>
<td>5</td>
<td>11</td>
<td>16</td>
<td>15%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>328</strong></td>
<td><strong>108</strong></td>
<td><strong>436</strong></td>
<td><strong>55%</strong></td>
</tr>
</tbody>
</table>

**Class of 2017**

**El Camino High School**

**Oceanside High School**

On Track – Students who are “on track” to meet A-G requirements with NO remediation

On Bubble – Students who need to (and can) remediate only 1 – 2 semester courses by June

Source: Oceanside Unified School District

**College Enrollment within First Year of Graduating Rising Slightly**

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>67.4%</td>
<td>67.9%</td>
<td>67.5%</td>
</tr>
</tbody>
</table>

Source: National Student Clearinghouse
Student Safety & Well-being

- **32%** Elementary school students who say they feel unsafe walking to and from school
- **42%** 9th graders who say they do not have a caring adult at school
- **32%** 11th graders who reported chronic sadness or hopelessness within the last 12 months

Source: California Health Kids Survey

The Promise Goals: *Cradle through Career*

- Ready for Kindergarten
- 3rd Grade Literacy
- 9th Grade on Track to Graduate
- Graduate College and Career Ready
- Postsecondary Completion

Oceanside Promise
Celebrating Progress: Graduate College and Career Ready

By 2026, the percentage of students graduating college and career ready will increase from 34% to 90%.

- Common Definition of College and Career Readiness
- Assessing How to Measure "Career Readiness"
- Prioritization of Indicators
- Action Plan Development

Celebrating Progress: Kindergarten Readiness

By 2026, the percentage of children entering kindergarten ready to learn and succeed will increase from 37% to 90%.

- Clear indicators of success
  - Increasing reading readiness
  - Improving access and enrollment in quality early learning environments
  - Improve attendance
- Common messaging plus reading tips
- Pulse survey of parents with children 0-5
The Promise Goals: Cradle through Career

- Ready for Kindergarten
- 3rd Grade Literacy
- 9th Grade on Track to Graduate
- Graduate College and Career Ready
- Postsecondary Completion
- Safety, Health & Well-being

Oceanside Promise
The Oceanside Promise Foundation is an IRS registered 501(c)(3) nonprofit organization. Federal Tax ID is 47-2159619.

Mission

To inspire individuals and organizations to invest in the Oceanside Promise to achieve our shared vision of every student graduating ready to succeed in college, career, and life.
Supporting the Power of the Oceanside Promise Initiative

- New strategic plan with emphasis on raising financial resources
  - Oceanside Promise Backbone Capacity
  - Emerging Promise strategies
  - Scholarships
- Web site launch by end of February
- Public Awareness & Engagement
If I am not for myself, who will be for me?

But if I am only for myself, who am I?

And if not now, when?

~Rabbi Hillel