

Oak Park School District 97  
Recruitment and Hiring for Diversity and Equity  
Support for Recommendations and Planning  
*DRAFT As of June 29, 2018*

Oak Park Elementary School District 97 (District 97) serves approximately 6,150 students in eight elementary schools and two middle schools in the unique community of Oak Park. The district has made important progress with Superintendent Dr. Carol Kelley to establish strategic priorities and build a leadership team that will influence outcomes for students for years to come. As part of this work, the district has articulated a deliberate focus on equity for all District 97 schools, first in creating a new role, Senior Director of Equity, reporting directly to the Superintendent, and then creating a shared priority for equity among all district leaders, embedding equity as part of the fabric of the district's core work. The community of Oak Park has also raised its own awareness and commitment to improving equity, with an impressive 35 community groups working to understand and improve issues related to equity that have an impact on the community overall. With support and urgency growing, District 97 has an awesome and unique opportunity to galvanize support and build momentum for transformative change in the way staff are hired, developed and retained that ultimately improves equity and diversity of the workforce, and improved outcomes for all students.

Alma Advisory Group (Alma) is in the process of gathering input and data on the current state of equity in recruitment, hiring and retention and is pleased to propose a scope of services that builds on this work:

- The work will start by providing concrete recommendations on how to address equity in recruitment, hiring and retention in Oak Park. These recommendations will be based on a combination of 1) the findings from our review of the current state of this work in Oak Park and 2) external benchmarking.
- Utilizing our recommendations, Alma will facilitate planning sessions to chart a path forward in its equity efforts moving forward. This will serve as the foundation for the district's work to improve diversity of the teacher workforce in the 2018-19 school year and beyond.

### Summary of Work

To understand the current state of the district's recruitment, hiring and retention strategies, Alma is currently meeting with stakeholders to understand their perspective on these issues and is conducting a review of district talent-related data. This work seeks to answer the following key question:

- **Recruitment** - Is the district strategically recruiting and selecting high potential candidates who demonstrate the capacity to successfully meet the district's goals for students? What attracts high-caliber and diverse candidates to the district, and what key practices or policies may hurt the district's efforts to recruit great candidates? Is the district tapping into strong local and national sources and employing strategies proven to successfully attract a diverse and high-quality candidate pool that represents the district's evolving student demographic?
- **Hiring and Deployment** - Do principals have a streamlined and competency-based process to screen and select great candidates? Are hiring steps inclusive, and do screening activities mitigate bias? Are hiring timelines early enough to support the hiring of the best candidates before competing districts make offers? Are educators deployed to schools in a way that ensures that all students have equitable access to great teachers, and that the strongest teachers are placed where they are needed the most?
- **Retention** - Do teachers of color feel they work in a supportive working environment, such that they would recommend District 97 to other teachers of color as a place to work? Are principals proactively seeking to understand which high-performing teachers may be at risk of leaving the district, and actively working to retain them? Do principals have tools, data and support to retain high-performing teachers?

This scope builds on the information gathering work already underway by adding external benchmarking analysis, providing the district with recommendations based on thoughtful review of the results and working with the district to chart a path forward.

**The Alma team will provide Oak Park with a set of recommendations, with the following deliverables:**

- **Written Recommendations, with supporting evidence:** Based on a combination of our findings and a review of national and local best practices, Alma will provide Oak Park with a set of recommendations that the district can consider implementing. At the district's discretion, our findings can be shared broadly with stakeholders to foster a shared understanding of the current state of diversity, equity and inclusion in District 97's hiring practices, and the highest-leverage actions to improve diversity of the teacher workforce over time.
- **Facilitation of in-person presentation of the findings and recommendations:** After presenting a draft of the findings to district leadership, Alma will support the district in presenting these findings to stakeholders. This could entail Alma presenting or co-presenting the findings in person or providing the district with materials that can be shared.

**Using the recommendations as a starting point, the Alma team will support District 97 in developing a strategy and implementation plan, with the following deliverables:**

- **Confirmed priorities for the next one to three years:** We will facilitate a working group of district representatives to confirm the top three to five priorities expected to impact diversity and equity in hiring, deployment and retention of teachers.
- **First-Year Action Plan:** Develop a detailed project plan to support implementation, laying out both internal activities, timelines and roles and responsibilities for the next year. This includes detailed plans for revising key practices and/or policies.
- **Recruiting and Hiring Calendar:** Develop a recruiting and hiring calendar mapping out key activities throughout the year.
- **Communications and Change Management Plan:** Design internal and external communications plans and materials around recruitment and hiring.
- **Performance metrics:** Ensure the right metrics and tools for tracking the results of key recruiting, hiring and retention activities throughout the year.

**Our work will unfold as follows:**

**Present finding and recommendations for recruiting, hiring and retaining a diverse workforce**

Utilizing the findings from the review, the Alma team will present its key findings and recommendations to the district's leadership, identifying strengths, challenges and priority recommendations for recruiting and hiring. As part of our findings and presentation, the Alma team will provide recommendations on key improvements, timing and implementation of priorities. During the presentation, we will accomplish the following:

- Review the Alma team's findings and recommendations:
  - Alma will provide a high-level review for district leadership that can be externally shared.
  - A more detailed set of recommendations and options will be provided as the basis for beginning the planning work.
- Discuss implications for the district's overarching strategy and future needs related to ensuring the right people are in the right roles in each school.
- Link recommendations to national research and best practices.

**Establish and Engage a Working Committee to Guide the Planning Effort**

Alma will work with D97 to establish a working group of district representatives who will partner together to design the strategy for the next one to three years and action plan for year one. We will work with the district to identify stakeholder management goals for the project, and to establish a working group of district leaders, teachers and principals to support the planning effort. As part of this work, Alma will:

a. Facilitate a combination of two on-site committee planning sessions plus virtual working sessions to:

a. Host two strategic planning committee sessions to:

1. Level set to confirm work, timelines, and expectations for the project

2. Discuss the priority strategic plan components to clarify most important 3-5 strategies

3. Define core metrics for strategies to inform how we measure progress
- b. Host stakeholder input sessions to vet outcomes of both planning sessions
  1. Share current thinking and progress for both teams
  2. Capture input and feedback to inform next iteration of the plans
- b. Work with the planning committee to define performance metrics. Alma will facilitate commitment members in defining the metrics that will help D97 monitor progress throughout the year. The district can use these metrics to measure the fidelity of the implementation and capture information on the results of their work. Both quantitative and qualitative metrics can be considered.

#### **Build Recruitment and Hiring Calendar with HR**

Alma will work with HR team to develop key planning materials including Recruiting and Hiring Calendar and Communications plans for the year. As part of this work, we will host a planning session with the HR team to work through the recruitment and hiring calendar for the 2018-19 school year. Efforts will include identifying best approaches to address the biggest barriers to early hiring and identifying the right timing and best activities to engage potential candidates, and to carry out key recruitment and screening activities for the year, and when and how to involve principals along the way.

#### **Define a communication strategy and change management strategy priorities to support the work**

Alma will work with D97 to develop initial communication plans with key messages and elements to share with district and community constituents, including:

- a. Providing guidelines for the change management plan to support implementation of both plans
- b. Facilitating stakeholder meetings to obtain input and buy-in on plans for the 2018-19 school year
- c. Co-presenting with members of the committee/task force to the Board if helpful

#### **Budget and Invoicing**

The cost for the scope of services defined in this proposal is \$30,000: In our experience, projects of this nature require some flexibility in terms of approach. The level of effort varies based on the receptivity of the audience, the number of visits and whether or not we lead presentations to the Board or others.

We propose the following invoice schedule:

- \$10,000 upon delivery of project plan and findings report
- \$15,000 upon completion of planning committee and stakeholder feedback meetings
- \$5,000 on completing of the recruitment calendar, final communications plan and project wrap-up

## About Alma Advisory Group

Alma Advisory Group, LLC (Alma) is a consulting firm with the mission of fostering the culture, people, and practices that enable staff to do their best, teams to do great work, and organizations to accomplish outstanding results. Led by founder and Chief Executive Officer Monica Santana Rosen, Alma launched in September 2016. We partner closely with our clients to understand their unique context, and the conditions that affect their ability to ensure the success of their staff. Then we work in collaboration with our clients to chart a path to solving their most pressing human capital needs, building the capacity in-house to lead and continue to strengthen their work beyond our time with them.

We believe that an organization's success relies on PEOPLE

- A clear understanding of the kind of people the organization needs in order to thrive
- A sense of current gaps in talent, and knowledge of how future openings can help bridge those gaps
- A strategy for identifying an organization's best people and finding ways to reward, leverage and inspire them
- A culture with the practices that support the people within the organization and help them succeed

We accomplish this aim through offering our clients a following set of services, including: Talent Management Assessment, Talent Strategy Design, Implementation, and Team Capacity-Building, Diversity, Equity and Inclusion, Leadership Pipeline, Support and Supervision, and Executive Search.

## Examples of Our Work in Diversity, Equity and Inclusion:

### Diversity in Teacher Hiring – Madison Metropolitan School District

Monica and the team worked with district leaders and stakeholders, who had been unsuccessful for years at improving diversity of new teacher hires. Monica and her team facilitated a process in partnership with Human Resources (HR), principals and teacher leaders to overhaul teacher recruitment and screening. Over the course of one school year, a stakeholder task force articulated the competencies needed for teachers from the first day on the job. A new screening process was designed that made hiring easier for principals, but also provided new tools that were performance-based and aligned to competencies to minimize bias. A new approach to candidate engagement enabled HR to strategically connect with talented diverse teachers to build a strong pool and improve the yield of accepted offers. In its first year, principals were overwhelmingly supportive of the new process, but more importantly the process has shown significant improvements in diverse hiring at a time when teacher shortages are widely reported across the nation. The district experienced a 28% improvement in diversity of new teacher hires in the first full year and hired a record-breaking 83 teachers of color in the 2017-18 school year. Three years after Alma's support concluded, the district has demonstrated the capacity to sustain and successfully lead this work on their own.

### Diversity, Equity and Inclusion in Teacher Hiring - River Forest Public School

Alma completed a review of the district's teacher recruitment and hiring processes. Work included a detailed review of the teacher recruitment process to understand whether the district was attracting strong and diverse applicants. Alma also carried out an in-depth study of the selection and hiring processes, aimed at understanding whether the district had a streamlined, competency-based process to screen and select teachers and if hiring timelines were early enough to hire the best candidates. Our team conducted an analysis of key human capital data, district processes and perceptions related to diverse staff and students, reviewed national research on the value of strong, diverse teaching staff on student outcomes, and identified teacher recruiting and hiring models proven effective for hiring strong, diverse staff.

### Hiring for Diversity, Equity, and Inclusion – Intrinsic Schools

Alma supported Intrinsic Schools, a charter school network in Chicago, to accomplish their goal of ensuring a diverse and talented pool of applicants for the coming school year's openings. We worked closely with the Chief of Staff to assess current screening practices and teacher competencies and strengthened interview activities to align with skills most needed for Intrinsic teachers. Through our work, we supported the Chief of Staff to create opportunities for stakeholder engagement and input throughout the process and helped define the change management plan to support the initiative's long-term success.

## Attracting and Deploying Talented Teachers to High-Need Schools - Guilford County Schools

The district recently engaged Alma to support a review of the district's teacher transfer process. The Alma team facilitated a design session with teachers, school support officers (principal supervisors) and other district leaders to redesign teacher transfer processes to attract high-performing teachers to high-need schools. This included a review of teacher transfer data, and the consideration of teacher compensation as a tool to support hiring and retention in high-need schools. Monica has since helped draft a revised teacher transfer procedure that is currently being implemented.

## Our Team

**Monica Santana Rosen, Chief Executive Officer**, was born to immigrant parents who instilled in her a deep value for education which serves as the foundation that propelled her professionally. Monica spent the last two decades working to both build strong diverse workplaces and enable leaders to do great work. Her career began in philanthropy with the Tiger Foundation, where Monica was part of a team that supported nonprofits working to break the cycle of poverty in New York City. Monica later served as the Executive Director for Management Leadership for Tomorrow (MLT), an organization working to diversify leadership in the upper ranks of the public and private sectors. Monica helped launch MLT's MBA-Prep program before pursuing her own MBA at Harvard Business School.

Monica joined Chicago Public Schools in 2004. She helped lead an HR redesign effort, and then managed and led the 65-staff member HR operational team at CPS. During her tenure, average transaction turn-around time improved from 8 weeks down to 3 days, call answer rates from 45% to 93%, and first call resolution from 45% to 75%. Monica then served as Talent Management Officer, where she focused specifically on leadership pipelines for the district. She spearheaded the redesign of a principal screening process, launched a national principal recruitment effort, and supported the strategic promotion, support and succession planning for principals. She also established the Leadership Development and Support unit, where she oversaw the district's Principal Induction program and support for the district's 26 Chief Area Officers (i.e., principal supervisors). In 2012 Monica launched a human capital consulting practice for Cross & Joftus, and in the fall of 2016, Monica ventured out to develop Alma Advisory Group, LLC with a talented and diverse leadership team, supporting organizations nationally to hire, develop, support and retain a high-quality workforce.



**Yanika S. Daniels, Managing Director, Talent Cultivation and Acquisition**, joined Alma in Spring 2018 after a few years of independent Human Capital consulting for several mid-to-large urban K12 school districts and charter management organization. Prior to consulting, Yanika was the Managing Director of Recruitment at Teach For America (TFA), where she was responsible for the Southern Regional recruitment corps members for its national teaching pipeline. She also served as a Regional Coach with Teach For America in Atlanta, GA. Yanika has significant experience supporting and developing school leaders as a coach for 11 regional Heads of District/School Partners, advising and serving as thought partners on district/charter relationships, human capital strategies and best practices for each region. Prior to this role, Yanika served as Director of Talent Management for the Fulton County Schools System, where she implemented a rigorous principal and assistant principal selection process for Fulton County Schools.

Yanika's work led to the hiring of over 50 new principals and 80 assistant principals, supporting 20% turnover in school leadership over 2 years. She also designed and implemented an assistant principal leadership development program specifically to create an official district principal pipeline process. Yanika also designed and led professional development for Fulton County that dove into key performance competencies the state of Georgia outlined for all school leaders. Yanika currently serves as a Founding Board Member of a charter school in Atlanta, Georgia, overseeing human capital processes and procedures for a 6-12 charter set to open in 2017. Before moving into education, Yanika spent 9 years working in the private sector with 4 of those in management consulting specializing in process and project management.



Yanika holds a Bachelor of Engineering from Vanderbilt University and a Master's of Supply Chain Management from MIT. She is a graduate of the Broad Residency in Urban Education.

**Eliana Pereyra, Vice President of Teacher and Leader Pipelines**, is a first generation American of Dominican descent,



who has dedicated her career to working in and with public school systems to ensure the absolute best educators and leaders serve students. Eliana brings over a decade of experience in talent identification and cultivation, program development, and HR policy. She is passionate about working on initiatives that systemically improve conditions for people to do their best work and that focus on the identification and cultivation of the best leaders to serve students. Prior to joining the Alma team, Eliana served as an associate with Cross & Joftus, LLC, where she worked with school districts around the country to establish or strengthen leadership pipelines, support talent cultivation efforts, and design competency-based selection processes.

Before C&J, Eliana spent nearly six years with the NYC Department of Education overseeing various aspects of principal pipeline and teacher leadership opportunities across 400+ schools. Her work included developing policy, securing resources, cultivating partner relationships, and overseeing program evaluation. Prior to her work at the department, Eliana served as a school social worker where she worked with recent immigrant students at risk of dropping out. In addition to district level experience, she brings non-profit experience through her role on the national admissions team for New Leaders where she developed systems and processes that ensured streamlined implementation of a rigorous, competency-based selection cycle for principal residents across seven program cities. Eliana received a M.S.W. from the Hunter School of Social Work and a B.A. in Economics from NYU. Her social work background serves as the framework from which she approaches all aspects of her work.

**Sandra Aileen Tacina, Managing Director of Talent Analytics**, a Cleveland native, has spent over 15 years using analytics to help organizations improve talent management. Sandra spent 6 years at the NYC Department of Education, where she formed and led the Talent Analytics group, providing senior leadership with the analysis needed to reform the system's human capital policies and creating data tools and reports for school leaders. The teams' work included: leading DOE's efforts to provide performance data to over 12,000 teachers, developing systems to improve the tenure process for teachers and principals, and creating data dashboards to help school leaders easily understand human capital trends. Sandra's team also designed and provided training to teachers, principals and district staff on how to use data in decision making.

Outside of the DOE, Sandra has led work in HR and education both in the US and abroad. She spent the last two years running Human Resources, Training and Development for Doctors Without Borders' medical missions in Africa. There, she developed training plans for over 250 staff based on needs analysis and implemented a new compensation system. She also worked with the Armenian Government's Quality Assurance Agency to develop and pilot teacher quality training programs designed to improve instruction techniques in Armenian universities. Previously, Sandra worked as an education consultant Cross & Joftus, where she helped school districts improve human resource management and as a management consultant with the Boston Consulting Group. Earlier in her career, Sandra served a Peace Corps Volunteer in Ukraine, where she taught university level Economics and high school Business English. She holds a BA in Economics and a MBA from the University of Chicago.

**Sherri Sherrell Davis, Senior Associate**, spent the last eight years driving district transformation through strategic



planning, organizational effectiveness, and leadership development. Sherri currently leads Strategy, Talent and Operations for the Teach for America Metro Atlanta Region (TFA). In her role, she is responsible for ensuring TFA people and resources maintain alignment to the district and community partners. Before TFA, Sherri served as Chief of Staff for The School District of Palm Beach County, Florida. There, Sherri worked directly with the Superintendent to coordinate District-wide endeavors, led the District's strategic plan implementation, and acted as a liaison between the Superintendent, District leadership and the community. Sherri also served as District contact for state and federal legislators and managed legislative impacts to the District.

Prior to her work in Florida, Sherri worked as the Director of Strategic Planning and Project Management in the Fulton County School System. In her role, Sherri led the District's five-year strategic plan and led 17 strategic initiatives to completion through project management.

Sherri's work included data dashboards, leadership engagement and ongoing and transparent communication with the school board and community. Before transitioning to K-12 education, Sherri worked as an organization and change management consultant with Deloitte Consulting LLP. Her client portfolio included the Departments of Public Welfare and Education in the Commonwealth of Pennsylvania, Los Angeles Unified School District Charter Schools, The Coca-Cola Company and AT&T. Hailing from Detroit, Sherri holds a bachelor's degree in Organizational Studies from the University of Michigan, a Master's degree in Corporate and Community Partnership from the Harvard School of Education, and a Master's degree in Educational Leadership from the Broad Center for the Management of School Systems.

**Alejandra (Javiera) Caballero, Program Coordinator**, came to the United States as a child from Chile and grew up in Charlotte, North Carolina. She is a former Montessori educator with classroom teaching experience ranging from pre-K through middle school. She has developed and adapted Montessori curriculum for several non-Montessori education settings, including a community run preschool, in Durham, NC, which she helped create. Javiera has worked at the community level organizing, fundraising and running a cooperative bakery that focused on issues around food security and access to sustainably sourced food for low-income families. In January 2018, her commitment to community and social justice moved her into a new role when appointed as the first Latina member of the Durham City Council.

Javiera has been a core team member with Monica Rosen and supported the design and development of principal pipeline strategies for multiple districts, coordinated third party application reviews for the Gwinnett County Public Schools, and developed content for revised teacher screening processes and for competency rubrics across multiple districts. She has a BA from Appalachian State University in Political Science.



**Deborah Taylor (Debbie), Business Manager**, is SHRM certified and has 20+ years in administrative office experience. She previously worked for Tangent Screen Print Inc. where she helped build the company up from its inception, developing human resources, payables/receivables, payroll, shipping, reception systems to twelve years of success before moving on to working in public education, first in the Title IX and ADA Office (now known as the Equal Opportunities Compliance Office) at Chicago Public Schools, then joining Monica in the department of Employee Services. She moved to Leadership Development in 2011, providing support for the creation of Chicago Leadership Collaborative, along with the new department Office of Network Support. Before leaving CPS in 2016, Debbie provided administrative support to three departments within Office of Network Support, along with performing Executive Assistant duties for the Independent School Principals Network.

