Proposal to Lowell Community Charter School for Strategic Planning Support

SECTION A: PROPOSED SCOPE OF WORK

CONTEXT
Lowell Community Charter Public School (LCCPS) is a public charter located in Lowell, MA. Founded in 2000 by a group of majority immigrant families looking for a better option for their children, Lowell has enjoyed a rich 17-year history and current serves 800 students in grades Pk-8\textsuperscript{th}. LCCPS serves a very diverse student body in terms of race and ethnicity and, when compared to the state, serves relatively high proportions of students who are English Language Learners, whose first language is not English, who are economically disadvantaged and who are considered high need. The school deeply values the rich diversity of the community it serves and this is a core feature of the school’s identity. With a focus on preparing students for success in college and beyond, the school instills in its students habits of excellence, global citizenship and community. Over the past few years, LCCPS has established a strong record of success preparing students for high school and closing gaps between a wide variety of student groups. With a recent leadership transition and a recognition that it must continue to evolve and grow, LCCPS is taking steps to shape and define the next chapter of its history with a fresh strategic plan. In alignment to the plan, the organization structure may need to evolve.

Bellwether would be delighted to partner with Lowell Community Charter Public School to develop a strategic plan that would outline the school’s approach to its growth and impact over the next 5 years.

KEY QUESTIONS

1. What is the inspiring and shared vision for impact that reflects LCCPS’s mission, history and the educational context in which it operates today?

2. What is LCCPS’s vision for its graduates? How does LCCPS measure success in delivering on this promise to students and families?
3. What are the schools' strengths, weaknesses, opportunities and threats?
   a. What is working well and where are the gaps within LCCPS's program strategy?
   b. Where is LCCPS struggling to implement its strategy consistently and effectively?
   c. How is LCCPS using human capital to achieve its goals? Does LCCPS's approach to recruitment, development, evaluation, support and retention align to its strategic goals?
   d. What changes in student population or education context may be driving the need for adjustments to the program to better meet current student needs?
4. What do board, leadership, staff, students and parents believe is special about LCCPS? Where do each of these groups see opportunities for improvement?
5. Given broad input from stakeholders and the fact-base, what is the best way for LCCPS to continue to evolve and grow its impact over the next 5 years?
   a. What are the small number of critical path initiatives that LCCPS must drive to enable greater impact over the next 5 years?
   b. Who should lead each initiative?
   c. How should LCCPS measure progress?
6. What are the high level resource requirements associated with these priorities?
7. What are the best methods and tools for communicating LCCPS' long term strategic plan to its community and stakeholders?

APPROACH & TIMELINE
The proposed timeline is 14 weeks, or approximately three and a half months. Bellwether is available to launch the work as soon as early to mid-February, and it would then conclude in late May, with the draft plan presentation to the board on May 21 and final report by June 1. Bellwether would be excited to partner with LCCPS to develop a five-year strategic plan to set clear priorities and increase impact over time. In this proposal, we frame three phases of support. First, in the Current state assessment phase, Bellwether will understand key strategic decisions made to date, gather data to understand LCCPS's strengths and gaps, gather input from a broad group of stakeholders and begin to assess options that enable
LCCPS to achieve its vision. In the **Options assessment phase**, we will evaluate options for priority activities and support the leadership team and board in making some key decisions. Finally, in a short **Implementation planning phase**, we will finalize the plan document that summarizes decisions made during this process, which will enable LCCPS to quickly and effectively begin to implement.

**PHASE 0: PRE-LAUNCH SUPPORT (1 WEEK)**
1. Create work-plan articulating key work modules:
2. Finalize key dates and meetings;
3. Agree on roles and expectations for Bellwether and LCCPS Board, steering committee [see roles, below], leaders, staff and any other stakeholder participants;
4. Draft a document/data request for LCCPS to secure any existing research/diligence materials related to the school, to be submitted to Bellwether via Google Drive;
5. Review documents received in document request;
6. Schedule key interviews and focus groups

**PHASE I: STRATEGIC ASSESSMENT (5 WEEKS)**
1. Conduct initial project kickoff visit to LCCPS to:
   a. Hold kickoff meeting with the Board/Board chair, Executive Director (ED) and Principal;
   b. Build relationship with LCCPS leadership team;
   c. Understand current state/thinking to date on strategic planning questions and range of options for future growth and impact;
   d. Interview leadership team to understand ongoing perspectives on key strategic planning questions
   e. Conduct 2-3 focus groups with key stakeholder groups (likely school based senior leadership and teachers)
2. Understand LCCPS's vision for the LCCPS graduate and refine as needed
   a. Capture current description of the LCCPS graduate and measures of success through document review and interviews
b. Synthesize perspectives from team on future-looking tweaks to the profile and
drivers of success and gaps in outcomes;

3. Program assessment: Build understanding of academic strategy, human capital
approach, and current drivers of results
   a. Interview academic leadership team (CAO, assistant principal, coaches, etc.) to
understand academic strategy across all major categories of work (curriculum,
assessment, instructional approach, professional learning, culture systems, and
use of staff)
   b. Interview teachers, students and families via focus groups and one on ones as
appropriate to assess current strengths and areas of opportunity in program
implementation
   c. Analyze data on student outcomes across a range of measures
   d. Analyze data on teacher retention and development
   e. Conduct structured school visit to observe program in action and collect and
trends on instruction
   f. Synthesize input; identify themes, organize ideas, identify gaps
   g. Draft school assessment report

4. Non-academic supports assessment: Build understanding of supports provided to the
school for non-academic functions such as school operations, IT, HR, facilities, and
perceptions of quality and areas of opportunity
   a. Interview functional leaders (Director of Operations, Director of IT, etc.) and
review organization chart and role descriptions
   b. Review school feedback on non-academic supports (through existing survey
data as available, or as possible through interview input) seeking perspectives
on areas of strength and areas of opportunity

5. Working session #1: Prepare and facilitate working session with Steering committee
to:
   a. Build relationship with Steering committee
   b. Confirm LCCPS graduate profile and outcome goals
   c. Discuss strategic assessment and implications for potential priorities for
exploration
d. Review and narrow options around questions for Bellwether and LCCPS focus in Phase II

e. Prepare for presentation of assessment to the Board/Board chair, ED & Principal

Present summary of strategic assessment to the Board/Board chair, ED & Principal, including strengths and areas of opportunity across all areas assessed; discuss focus questions for Phase II; seek input on focus for Phase II.

PHASE II: OPTIONS ASSESSMENT (5 WEEKS)

1. Program priorities: Based on school assessment report, the LCCPS graduate profile, and a prioritized view of outcomes gaps and drivers, work with LCCPS team and conduct select research and benchmarking to evaluate potential program initiatives, including the changes necessary, costs and likely outcomes (this will include a series of phone calls and/or in-person meetings to engage appropriate LCCPS stakeholders, desk research and interviews with identified benchmark organizations, synthesis and iteration by Bellwether team). These options could include, for example, enhancements to LCCPS’s human capital systems, including role definition, recruiting, evaluation and/or support, or deep dive planning for modification of the approach to using data to drive decisions.

2. Organizational priorities: Based on current state assessment and a prioritized view of outcomes gaps and drivers, work with LCCPS team and conduct select research and benchmarking to evaluate potential non-academic support initiatives (if any), including the changes necessary, costs and likely outcomes.

3. Financial model: Working with LCCPS’s finance person, provide input to a 5 year financial model so that it can be used as a forward-looking decision-making tool.
   a. Conduct conversations with finance lead to understand historical data and to support his/her creation of a simple model;
   b. Provide cost inputs based on the key initiatives identified through the planning process
   c. Review and provide feedback on base case financials
4. Seek additional input from LCCPS staff on key initiatives as they become more clear – Bellwether could do this through a couple of focus groups and/or support Nick by creating materials to be shared in a town hall type setting

5. Working session #2 and #3: hold working sessions for the Steering Committee at the mid-point and near end of this phase of work to seek input, build toward consensus, and drive to decisions around key priorities.

PHASE III: IMPLEMENTATION PLANNING (3 WEEKS)

1. Phase II follow-up: Revise conclusions and address any outstanding questions from Phase II of the work.

2. Participate in LCCPS Board meeting at some point during this phase to share emerging plan and seek feedback from Board on key decision points

3. Summary strategic plan document: Develop an external-facing summary PowerPoint document that can be used to communicate key decisions made during the course of the strategic planning process. Seek feedback on this document from the Steering Committee via a short meeting and/or phone call.

4. Compile and revise internal facing PowerPoint that includes more detail around key decisions for use with internal stakeholders / during implementation phase of work.

5. Financial model: Based on decisions made during phase II, help LCCPS finance lead to revise and finalize financial model tool.

DELIVERABLES

- A school assessment report
- A 1 and 5 year strategic plan in the form of presentation (most likely PowerPoint) for use with stakeholders and funders to engage and excite them about LCCPS’s path forward
- Detailed internal-facing PowerPoint deck that summarizes key decisions made and data gathered
- Input into an Excel based financial model that an LCCPS finance leader will build
- An implementation roadmap that will guide the early planning and implementation of the work
• 3-4 steering committee sessions and facilitation to solicit input and drive to alignment around priorities

SECTION B: ORGANIZATIONAL CAPACITY, MANAGEMENT, AND KEY PERSONNEL

PROJECT MANAGEMENT

ROLES AND RESPONSIBILITIES
Across all types of support provided, Bellwether designs the process, manages the project timeline around major milestones and deliverables, drives the data analysis, and facilitates discussions related to key decisions. We serve as the "arms and legs", but also play the role of "critical friend", challenging the thinking and bringing an objective, outside perspective informed by significant experience working with a variety of schools and education reform organizations.

At the same time, we expect our clients’ leadership team and Board to be important thought partners throughout the process, to look critically at current assumptions and strategies and, at times, make tough tradeoffs. We expect to collaborate with the following stakeholders throughout the project (and at the outset, we jointly define more specifically how best to work together):

• Steering Committee: This team should include a small set of decision-makers who will play a significant role in reviewing the fact-base, pressure testing emerging insights, discussing options for priority action steps, and then defining the path forward. This team engages in co-creation of materials and provides the most input and feedback to the process and the content, and should be available for regular touch-points throughout the work. They will then play a significant role in creating buy-in for any recommended changes. This often includes the Executive Director, one or more Board of Directors members and/or funders, and other key members of the leadership team. This group will meet roughly four times throughout the project (kickoff, end of phase I, and twice during phase II).
• **Project Lead:** This person will be the primary contact for the project. Upfront, this person will be most directly involved with facilitating information flow, including introductions to key staff and Board members; focus will then shift to reacting to draft output, providing feedback, participating in phone calls and working sessions, debating recommendations, and helping to troubleshoot across all of the phases of work as needed. If there are questions about minor adjustments to scope, as there often are, this person would respond to these questions. This should likely be Nick Leonardos.

• **LCCPS POC (Point of Contact):** The LCCPS POC will be the primary point person for LCCPS. This person will help to collect data internally, identify interviewees within the organization, coordinate the site visit, serve as primary thought partner to Bellwether and manage the overall engagement with LCCPS. This will likely require 1-2 hours per week, with slightly more leading up to and during the Bellwether assessment visit in order to manage logistics. This may also be Nick, but could be another staff member who supports special projects.

• **Board of Trustees:** We believe engagement from the Board is critical to the success of the strategic planning process. Bellwether will interview members of the Board at the launch of the project to seek ingoing perspectives on key strategic planning questions. We are open to several ways that board members can participate in the planning process, including participating on the steering committee and receiving updates during board meetings. We can co-design a board engagement approach to fit LCCPS’s needs.

• **Financial model support:** Assuming that LCCPS would like a 5 year financial model, we will need the time of the appropriate LCCPS team member who can build the financial model, and we will work with this person on key inputs to the model that come out of the strategic planning process.

• **Other key stakeholders as needed:** As noted, we will request time and input from other stakeholders (e.g., school leaders, non-academic staff, teachers, students and families),
throughout the process. We will carefully use their time to avoid disrupting their primary work. These voices are critical to the success of the plan.

The combination of a strong process and rigorous content creation results in output that is actionable and that enjoys the support and buy-in from the key members of the Board, leadership and broader stakeholder community of LCCPS who will make the plan happen.

WHAT SUCCESS LOOKS LIKE
We work jointly with our clients to develop a shared definition of success, but propose the following as a starting point, based on what we heard from you thus far.

- Leadership of LCCPS has a clear set of one year priorities that align to, and cascade from, a 5-year strategic plan; there is strong alignment around the strategic plan across the leadership team and the board of trustees.
- Leadership of LCCPS and the board of trustees have increased understanding of the strengths and areas of opportunity on its path toward implementing the strategic plan, and a perspective on how to support LCCPS to increase likelihood of success.

ORGANIZATIONAL CAPACITY AND QUALIFICATIONS
Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice.

Bellwether envisions a world in which race, ethnicity, and income no longer predict opportunities for students, and the American education system affords all individuals the ability to determine their own path and lead a productive and fulfilling life.

Our work focuses on five core areas:
- Policy analysis and research
- Strategy and growth planning
- Organizational effectiveness and efficiency
- Implementation support
• Educational program evaluation

We believe that the only way to ensure all children have access to a high-quality education is to take a holistic approach by changing field-level policies and perceptions while strengthening and supporting individual organizations. Since many of the challenges organizations face are complex, they require multiple perspectives and areas of expertise.

Our team brings rich perspectives from our own on-the-ground experience with charter schools. We have an extensive understanding of the characteristics and challenges of charter schools and networks serving high-need communities, and of the external policy and contextual factors that affect charter creation, success, and growth. Our Strategic Advising leaders have served in leadership roles at Charter Management Organizations (CMOs), co-developed new charter schools, led school turnaround efforts, partnered with school leaders to drive whole school transformations, funded charter schools and STEM initiatives, served as teachers in low-income, high need communities, supported district turnaround efforts, and served on charter school boards. Our leaders also bring experience, training and tools from top private sector consulting firms such as Bain & Company, McKinsey, and BCG. These skills, combined with our deep education expertise, enable Bellwether to deliver unparalleled advice and planning on the issues that CMO leaders face across program, operations, human capital, finance, and governance.

SUMMARY OF SIMILAR WORK:
Bellwether has supported a number of charter schools at various stages of growth through a strategic planning process. Through this work, Bellwether has tailored advisory support to develop comprehensive plans, frameworks, exemplars, and resources used to enhance the thinking of leadership with respect to the possibilities for their organization.

• Bellwether has worked with many small networks to develop strategic plans that enable very high quality results for students. We are currently working with Ingenuity Prep Public Charter School in Washington, D.C. to develop a vision for a small network of schools. We also partnered with City on a Hill (3-campus Boston network) and Philip’s Academy
Charter School (standalone Newark charter school). In early 2014, we completed a planning process for KIPP San Antonio. We supported KIPP in defining the core elements of its model and how the central office will support each school, focusing on the pace and financial model required to support growth and achieve financial sustainability.

- We worked with PAVE Schools, a CMO with one school in Brooklyn, NY and one in Raleigh, NC, to develop a strategic growth plan for the organization. We conducted site visits, interviewed stakeholders, and conducted research on the Brooklyn and North Carolina landscapes to understand PAVE’s current strengths and challenges and identify ways for the organization to deepen and scale impact. Through this partnership we worked deeply with PAVE to define the go-forward organizational structure, including c-suite structure at the highest level as well as network and school roles needed over time to execute on the strategic plan. The process included both benchmarking of other organizations as well as an assessment of PAVE's unique organizational needs. Following the decisions about go-forward org structure, we worked deeply with PAVE to define and implement a decision-making structure (RAPID) in order to clarify decision rights and make decision-making more efficient and effective across the organization.

- Bellwether supported E.L. Haynes Public Charter School in Washington, DC to assess options to deepen its impact without opening additional school campuses. We worked with E.L. Haynes on defining the core elements of a “teaching hospital” model for its school which allowed it to deepen impact on students by developing best-in-class educators and broaden impact in Washington, DC by sharing best practices and successful human capital strategies with other schools.

- Bellwether partnered with the Denver School of Science and Technology to build its original growth plan that called for establishing five schools in Denver over five years; and also evaluated non-school-based expansion opportunities to impact STEM education across the state or nationally (a path that was not ultimately pursued). We designed the central office structure and staffing, supported the original definition of what functions and activities would take place at the central office and what functions and activities would
take place at the school level. We built a financial model to project revenues, costs, and the fundraising requirements for this growth.

- In 2017 Bellwether supported Match Education by doing a deep dive into its school performance compared to its goals over time. We conducted school walk throughs and staff interviews and identified key gaps in the schools. We then focused on understanding Match’s course pathways, school culture, and use of assistant teachers and tutors, and comparing Match’s approach to the approach of several exemplar schools to identify common zones of practice in these areas. This work resulted in the adoption of clarified policies by the board and refined direction to the Head of School.

- In Spring 2017, Bellwether conducted a Readiness to Grow Assessment cohort in partnership with Educate78 to support five charters/CMOs in Oakland to understand their readiness to grow; and we are now completing a second cohort of two charters in late 2017/early 2018. In October 2017, we launched a Readiness to Grow Assessment cohort in partnership with NewSchools Venture Fund to support five charters/CMOs across the country. This process entails interviews, data and document review, and school-based observation. It results in an actionable report that identifies strengths of the school across multiple dimensions of program and operations, and it identifies gaps that should be filled to improve student outcomes and prior to growth along with a road map for implementation.

**OUR TEAM**

**Mary Wells, Managing Partner – Project Lead**

Mary K. Wells is a co-founder and managing partner at Bellwether Education Partners. Mary leads the Strategic Advising practice within Bellwether, which focuses on supporting education organizations with growth strategy, assessing partnership opportunities, market assessment, business planning, organizational development, and implementation planning. Recent clients include Ascend Learning, Walton Foundation, IDEA Public Schools, Match Education, The Oaks Academy, City on a Hill, and The Achievement Network.
Mary has worked as a private sector consultant, an investor, and a nonprofit executive. From 2005 to 2007, she designed, launched, and managed the Texas Science, Technology, Engineering and Mathematics (T-STEM) Initiative for the Texas High School Project. T-STEM is a $71 million initiative to improve the quality of math and science education in Texas and to expand the pipeline of highly skilled employees qualified for careers in the economy of the 21st century. She also managed the New Schools portfolio for the Texas High School Project, which included investments in high-performing charter schools and school developers.

Mary brings extensive experience from the private sector. She was a manager and consultant with Bain & Company, where she worked primarily with Fortune 500 companies on growth strategy, new business development, and post-merger integration issues. She was with Bain & Company for over seven years. During that time, she advised Boston Public Schools on the creation and implementation of small learning communities within their comprehensive high schools on a pro bono basis. She holds a B.A. from Harvard University and an M.B.A. from Stanford University.

Tresha Ward, Academic Strategy Senior Advisor – Project Manager

Tresha is an academic strategy senior adviser at Bellwether Education Partners. She has 13 years in education. Since joining Bellwether in 2017 Tresha has worked with NewSchools Venture Fund, DC International School, Chicago Collegiate Charter School, Mundo Verde Charter School, and Lee Montessori. Prior to joining Bellwether, Tresha spent eight years in a number of leadership roles with the KIPP charter school network. Most recently she was a managing director of schools for KIPP NYC, where she focused on school turnaround. She was also the school leader development director for the KIPP Foundation. In this role she provided support to all of KIPP’s sitting school leaders either through the creation of leadership development programming, as an instructor for instructional leadership, or through direct coaching. Additionally, Tresha supported chief academic officers and school leaders in KIPP’s Texas regions on academic strategy implementation. In 2010, she opened KIPP Legacy Preparatory School, with KIPP Houston Public Schools, an internationally focused
school in Northeast Houston. Tresha grew Legacy to ~800 kids in grades pre-K through 3rd. Legacy now serves 900+ students in grades pre-K through 4th.

Tresha started her career as a teacher in Houston Independent School District. Tresha has also served as a leadership coach for school leaders and independently consulted with organizations and schools for several years. She attended Vanderbilt University for her bachelor’s degree and Stanford University for her master’s degree and started her education career as a Teach for America Houston corps member. She currently lives in Brooklyn, NY with her husband.