

Strategic Planning Service Overview 2011

Strategic Planning Service

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Strategic Planning Service

Background - 1

- Strategic Planning is a critical area for the ongoing development and improvement of quality charter schools.
- In collaboration with the **California Charter Schools Association (CCSA)**, EdTec has designed a charter school - centric, cost-efficient strategic planning process for charter schools.
- EdTec's Strategic Planning Service is specifically tailored to the needs of charter school organizations, developed from hands-on experience and knowledge of organizational best practices in the areas of charter school governance, accountability, and operations.

Strategic Planning Service

Background - 2

- Spending time and money on a strategic plan may seem like an effort that you should postpone in a tough budget year.
- However...
 - *it will likely take **years** – **not months** for the State to recover from the current economic downturn, and charter school leaders must be prepared.*
- Therefore...
 - *it is more important now than ever before for you to have a clear roadmap for the sustainability and success of your school!*

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Relevant EdTec Capabilities

- EdTec has deep charter school expertise in the areas of:
 - Strategic Planning
 - Board Governance: Evaluation and Training
 - School Improvement / Corrective Action Planning
 - Charter Development (new charter and renewal petitions)
- Over just the last few years, EdTec has assisted more than 30 charter schools with successful projects in these areas.
- The collective charter school knowledge and experience of EdTec's team of professionals has led CCSA to recommend EdTec as a preferred partner for strategic planning projects.

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Service Highlights & Benefits

- Service Highlights:

- Utilizes EdTec's proven and charter school-centric strategic planning approach, process steps, and deliverables to assist your school in an efficient and achievable process that maximizes project / school success.

- Service Benefits:

- Adjust the organization's direction in response to a changing environment and priorities
- Align your key stakeholders around a common vision that strengthens the support network for your school and that provides the context for day-to-day actions and decision making
- Establish a roadmap that maximizes your organization's success and incorporates the best trade-offs during challenging economic times over the next few years

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Service Highlights & Benefits

- Service Benefits (continued):
 - Ensure that your charter school's resources are aligned on the right goals and priorities
 - Enhance your ability to effectively tell your story to funders and stand out from other applicants
 - Set your school on the right path for charter renewal
 - Leverage an expert third-party to facilitate this critical process and coach you along the way

Strategic Planning Service

Overview - 1

- Phase 1: Needs Assessment
 - Work with school leader and key stakeholders to clarify need for strategic planning
 - Assess organization and community needs via online surveys, interviews
 - Review of school charter, existing materials / plans
- Phase 2: Developing A Strategic Roadmap - Focus on the “WHAT”
 - Review and debrief on results of Needs Assessment
 - Prepare / tailor working session materials to organization
 - Engage in 1-2 days of on-site sessions with school stakeholders to establish strategic direction and goals
 - Identify prospective strategies for achieving goals
 - Write Strategic Roadmap document

Strategic Planning Service

Overview - 2

- Phase 3: Detailed Action Planning – Focus on the “HOW”
 - Organize planning teams around focus areas
 - Guide and train teams on processes for analyzing the organization’s capabilities
 - Guide planning teams to develop detailed action plans by focus area
- Phase 4: Final Deliverable / Debrief & Follow Up
 - Present final deliverable / debriefing to Board
 - Determine ongoing plan of process assistance / oversight
- Overall Project Management
 - Provide project management throughout process

Strategic Planning Service

Detail - 1

- Phase 1: Needs Assessment
 - Review relevant existing organization / school materials
 - E.g., school charter, other program documentation, previously developed plans
 - Conduct telephone interviews and, if necessary, online surveys*
 - Interviews would be among the following stakeholder groups:
 - Board Member, School Leader, Parent Representative, Teacher, Classified Staff
 - Average of 3-4 interviews per school (maximum of 5)
 - Analyze Results
 - Review, analyze and tabulate results of surveys and interviews

Strategic Planning Service

Detail - 2

- Phase 2: Developing A Strategic Roadmap - Focus on the “WHAT”
 - Phase 1 Debrief and Prepare for Strategic Planning Sessions
 - As necessary, customize templates / tools to organization’s needs
 - Strategic Planning Sessions (1-2 days on-site)
 - Activity-based training and working sessions with key stakeholders
 - Overview / training on EdTec’s strategic planning process
 - Grounding in common terms, vocabulary and group norms
 - Review and affirmation of organization Mission, Vision, Values
 - Training on how to perform gap / SWOT analysis on issues as they arise

Strategic Planning Service

Detail - 3

- Phase 2: Developing A Strategic Roadmap - Focus on the “WHAT” (continued)
 - Strategic Planning Sessions (continued)
 - Establish broad organizational goals and organize them into defined focus areas
 - Identify some desired strategies for reaching goals
 - Establish committees to develop action plans
 - Set timelines and next steps
 - Development of Strategic Roadmap Document
 - Based on results of on-site sessions
 - Follow-up with key stakeholders, edit, provide feedback, etc.

Strategic Planning Service

Detail - 4

- Phase 3: Detailed Action Planning – Focus on the “HOW”
 - Organize planning teams for specific focus areas
 - Guide planning teams on how to perform the following:
 - High-level gap analysis on organization capabilities
 - Analysis of Strengths / Weaknesses / Opportunities / Threats (SWOT)
 - Train planning team members on action plan development:
 - Specific strategies to meet goals
 - Timelines and persons responsible
 - Decision-making protocol
 - Potential cost and benefit
 - Creation of detailed action plans
 - Developed by each planning team for their respective focus areas

Strategic Planning Service

Detail - 5

- Phase 4: Final Deliverable / Debrief & Follow Up
 - Prepare for final deliverable / discussion
 - Identify next steps with school leader
 - Present final deliverable / debriefing at Board meeting
 - Identify any on going EdTec plan oversight / assistance (optional)
- Overall Project Management
 - EdTec resource to provide project management of the overall process
 - Develop high-level project plan timeline and milestones at outset of the project
 - Refine and adjust project plan during the project, as necessary
 - Follow up with school leader and board on tasks, deliverables and dates

Selected Team Bios

■ Kelly Theofanis, Director of Client Management

- Kelly comes from a nonprofit consulting background, and has partnered with clients in education, arts, and social service on projects ranging from strategic planning to fundraising.
- The complexity of business in the nonprofit sector, as well as the disparity between the capacity of nonprofits to provide services and the populations of people in need, inspired Kelly to continue her work in public education and to pursue a degree in business.
- Kelly is an Education Pioneers alumna and worked with Green Dot Public Schools in Los Angeles while in business school.
- Based out of EdTec's Los Angeles office and promoted to Director of Client Management in July 2011, Kelly has been instrumental in EdTec's success and continued growth in Southern California.
- Kelly is originally from Los Angeles and graduated from Yale University with a BA in English and from the USC Marshall School of Business with an MBA.

Selected Team Bios

■ Jill Wells, Director of Educational Support Services

- 18+ years in education reform, working in multiple capacities, including executive director, teacher, consultant and developer for charter schools.
- Founding member of 3 charter schools; instrumental in developing and drafting each school's educational and operational plan. Met with authorizer, secured facilities, conducted board trainings, galvanized community support, recruited principals and teachers, and successfully applied for grants and bridge loans.
- Background includes providing technical assistance and strategic planning to schools and organizations, operational and fiscal reviews for 20+ charter schools, and the launch of CSDC's chief business officer training program.
- Founding board member of Schools in Action, a non-profit dedicated to improving educational opportunities and outcomes for students in LA County.
- Jill holds a Doctorate in Educational Leadership and MBA from University of Southern California, a Master of Education in Language, Linguistics and Cultural Studies from Boston University, and a Bachelor of Arts in Political Science from Vanderbilt University.

Selected Team Bios

- Peter Laub, Executive Vice President & Chief Client Services Officer
 - Charter school knowledge and expertise in many areas, with an emphasis in charter petition development, school business operations, board governance, and strategic planning.
 - Has presented numerous workshops and conference breakout sessions on Board Governance and other topics over the last six years through the California Charter Schools Association, the National Alliance for Public Charter Schools, and other charter school support organizations around the country.
 - With EdTec for over 7 years and, in addition to playing a primary services delivery role, has played a leadership role in the management and growth of the organization.
 - Experience prior to EdTec includes managing a performing arts education organization, working as a product manager at a corporate e-learning venture, and founding an online arts education company.
 - Peter holds an MBA, MA Ed, and Certificate of Public Management from Stanford University and a BA from Yale.

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Service Cost - 1

- Range of effort and cost depend on the following service level variables:
 - Number of on-site visits requested / required for successful project delivery
 - School staff / Board member needs, skill sets, availability
 - Geographic location of project (unproductive travel time costs)
 - EdTec has resources for this service based in both Northern and Southern California to help minimize unproductive travel time costs and actual travel costs.
- Project effort and cost estimates:
 - On average, project effort of 85 hours at a cost of \$10,125
 - Low to high range of 70–100 hours at an estimated cost of \$8,550-\$11,700

Strategic Planning Service

Service Cost - 2

- Estimated Service Cost

- Project scope and cost is developed with the school and mutually agreed to in advance of project kick-off.
- Work to be billed on a time and materials basis; the estimated cost ranges above include unproductive travel time but do not include any necessary, pre-approved travel expenses, billed separately.
- Estimated cost ranges assume single-site, independent charter school organizations; providing this service to multi-site / school networks may increase effort and cost estimates.

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Service Cost - 3

- Estimated Effort by Phase:

■ Phase 1: Needs Assessment	21 %
■ Phase 2: Developing a Strategic Roadmap (2 days on-site)	55 %
■ Phase 3: Detailed Action Planning	7 %
■ Phase 4: Final Deliverable / Debrief & Follow Up	12 %
■ <u>Project Management</u>	5 %
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Total Estimated Effort (avg. project = 85 hrs)	100 %

About EdTec - 1

- EdTec is a social venture founded in 2001 to ***develop, support and advance*** quality charter schools.
- EdTec's services allow charter school staff to focus more of their limited resources on classroom instruction and improving student achievement.
- Like any small business, charter schools need experienced operational staff with specialized skills but often cannot afford to bring that staff on board.
- EdTec provides charter schools with the expertise they require and has the economies of scale to hire personnel who specialize in different areas of school management and best practices.

About EdTec - 2

- Our exceptional team has provided unparalleled expertise and support to over 250 charter schools, charter developers, and charter associations across a comprehensive range of services.
- Staff of 35 professionals in three offices:
 - Northern California headquarters in Emeryville (SF Bay Area)
 - Southern California office in Los Angeles
 - New York office in Manhattan
- EdTec is a long-time partner and sponsor of the California Charter Schools Association.
- Re-elected to California Charter Schools Association Member Council; valued contributor to development of CCSA policy for the charter school movement in California.

About EdTec - 3

■ Diverse Client Base

- Large and small schools
 - 1,600 students to 80 students
- Start-ups and established schools
- Single-site independent schools and CMOs
- Geographically diverse
 - EdTec has delivered a variety of services in CA, AZ, FL, IL, NV, NY, OK, TN
 - Inner-city and rural
- Different pedagogic approaches
 - From Independent Study to Expeditionary Learning
- Simple to complex finances
 - Multiple campuses with cost allocations and inter-school transfers
 - Multiple restricted fund accounting and government reporting

Partner School References

- References Are Available Upon Request
- Representative Customer Quotes:

“Our partnership with EdTec is priceless! The staff is responsive, smart, and hard-working. We couldn’t do the hard work of educating our students without their support and services.”

- Jenna Stauffer, Founder - Lighthouse Community Charter School

“The professional staff at EdTec is second to none. They have assisted in so many ways that we consider them part of our school family. They are always prompt and responsive and ensure that we are successful in all facets of school administration.”

- Dr. Nicolas Retana, Executive Director - Ezequiel Tafoya Alvarado Academy

“EdTec is simply amazing. They have become an integral part of our board team by delivering accurate and up to date information, providing guidance in governance issues, and a lot more. Our staff leans on EdTec constantly in the areas of H.R., payroll, auditing and other key operational areas. The most exciting part is that EdTec understands schools and are always helping us find better ways to serve the needs of our students.

I would not want to run my organization without them.”

- Alison Diaz, Executive Director - Environmental Charter Schools