

INTERNATIONAL LEADERSHIP OF TEXAS



Others Before Self | Otros Antes De Uno Mismo | 先人后己

Bellwether will drive project deliverables and facilitate key decisions; ongoing engagement will be critical

Team roles and responsibilities

Bellwether Education Partners

We wear many hats: “arms and legs,” “critical friend,” and “connector”

- Manage the project timeline around major milestones and deliverables
- Drive data and policy analysis, external desk research, and interviews
- Work collaboratively with ILTexas leadership and stakeholders to surface options and highlight tradeoffs
- Facilitate discussions related to key decisions
- Bring an objective, outside perspective informed by experience working with a broad range of education organizations

ILTexas Steering Committee

- Engage as thought partners throughout the process, looking critically at current assumptions and strategies and discussing difficult tradeoffs
- Participate in at least five Working Sessions (4-5 hours, including pre-reading)
- React to draft output and provide feedback on emerging insights/ priorities

ILTexas Advisory Committee

- Provide input on the strategic planning process.
- Meet 2-3 times throughout the process for working sessions.
- Roundtable discussions with Cabinet Members and select Principals.

At the end of the work, we will have co-created a robust strategic plan and implementation roadmap

Major deliverables will include:

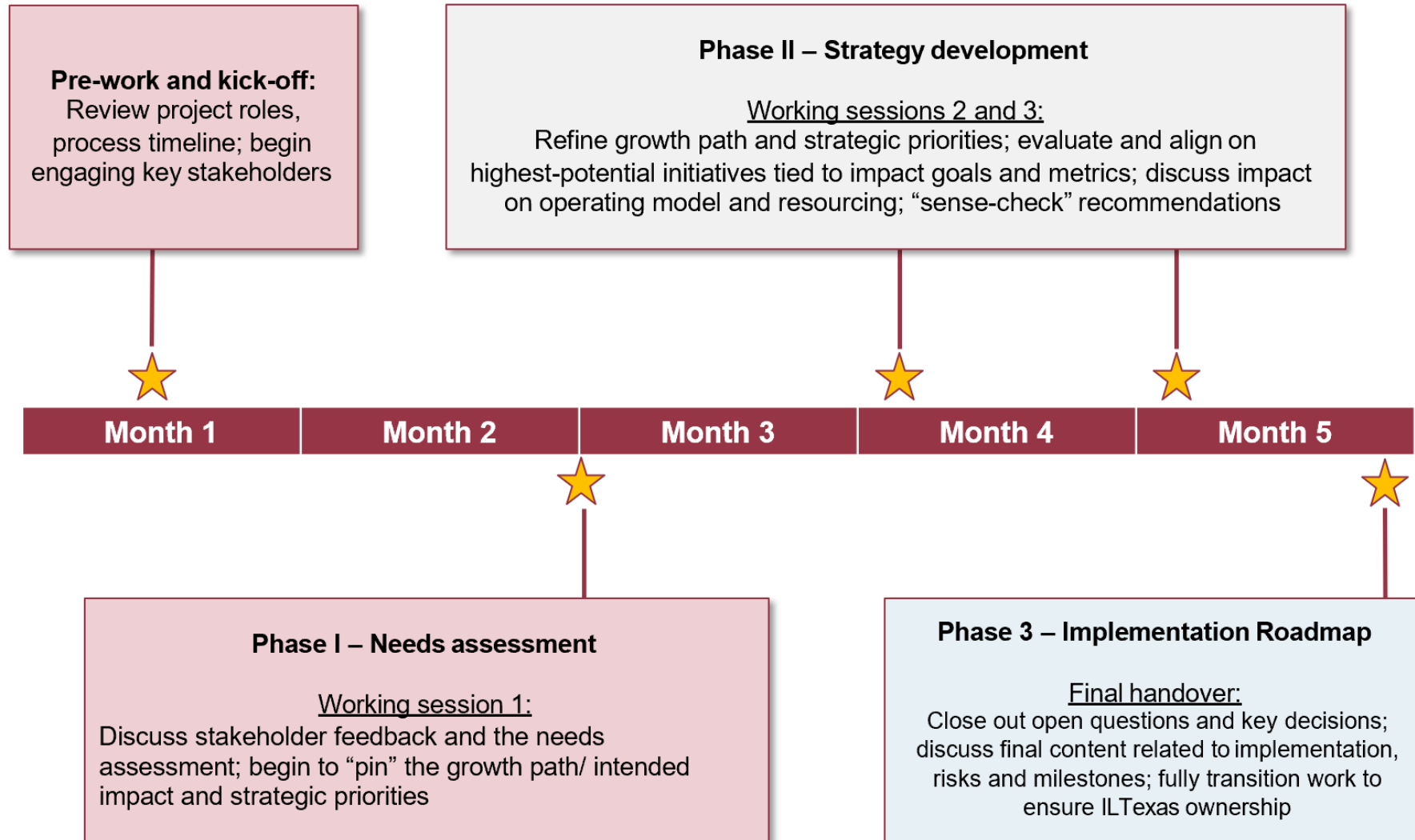
Strategic plan and collateral

- An in-depth **assessment of ILTexas' current state** (programmatic and non-programmatic), including **stakeholder feedback**
- **Best practice research/** case studies on related or analogous efforts in- and out-of-state, supporting calibration of ILTexas against comparables
- A clear five-year **strategic vision** and clear **impact goals/ growth path**
- A **set of strategies** aligned to the vision, with detail on the component initiatives, goals, and timelines
- **Organizational/ operational implications** of the plan (e.g., network vs. campus roles and responsibilities)
- Supporting inputs and assumptions to the **financial model**, enabling scenario planning
- A high-level **implementation roadmap** with aligned impact metrics and milestones
- **Summary materials** to share with internal and external stakeholders

Stakeholder engagement

- **Multiple facilitated in-person working sessions** with ILTexas leadership and the Board to co-create the strategy
- Support for targeted opportunities to **engage and obtain feedback from stakeholders**
- **Talking points** for leadership to share progress and publicly convey support and confidence in process and outcomes

The work will span ~five months, with opportunities for focused discussion and decision-making around the strategy



ILTexas Steering Committee

Steering Committee

Please identify 6-8 decision-makers to review the fact-base, sense-check emerging insights, discuss options, and define the path forward.
We will meet with this group ~5 times throughout the process for working sessions.

Steering Committee Team Member

First Name	Last Name	Role	Email
Edward	Conger	CEO/Superintendent	econger@iltexas.org
Aaron	Thorson	Chief of Staff	athorson@iltexas.org
Thomas	Seaberry	Deputy Superintendent	tseaberry@iltexas.org
Laura	Carrasco	Deputy Superintendent	lcarrasco@iltexas.org
James	Dworkin	Chief Financial Officer	jdworkin@iltexas.org
		Board Member	
		Board Member	

Proposed approach

The timeline for this work would be roughly four to five months, starting in winter of 2021 and wrapping by the end of the 2020-21 school year. This would allow ILTexas to have its strategic plan well-developed in advance of the budgeting/ hiring cycle for the following year, to allow time to “socialize” the plan with stakeholders before the end of the school year, and potentially to enable piloting of select new strategies over the summer/ early into the 2021-22 school year.

Phase 0. Plan for successful project launch (2 weeks)

In this phase, our project leadership team would ensure alignment with key members of the ILTexas project leadership team on the detailed workplan that will guide the work, including expectations for the cadence and structures for how network leaders and the Board will engage.

We propose the following activities for this phase:

- A. We would begin by creating a workplan articulating work modules and decision points for this effort; determining key dates and working sessions; and defining roles and expectations for Bellwether and ILTexas, including naming the subset of leaders comprising the Steering Committee for this work – see below. We would also plan for stakeholder engagement by identifying the range of stakeholders to be brought into this process, and how, and building out a high-level communications plan. (We appreciate that we will not be orienting to a broad-reaching process that seeks to reshape the organizational mission and vision, or to bring in the voice of students, parents, and staff members at every step along the way. At the same time, we believe it is important to *inform* ILTexas stakeholders of the process and provide *targeted* opportunities to ask questions and provide input; we would draft key messages/ talking points to describe this effort and begin dissemination).
- B. We would draft a document/ data request and begin to review available data. This would allow us to more deeply understand the current state of the network’s academics/ culture, human capital, organization/ operations, and finances. At this stage, intent would be to quickly build context and *not* to conduct additional detailed analysis.

One important question is whether ILTexas has recently conducted a staff survey to gauge practices, perceptions, and beliefs around network impact and adult culture. If not, we should discuss whether a diagnostic survey is warranted to understand experiences in regards to organizational structures, processes, and systems, including core values, decision-making, communications, organizational culture, recruitment, onboarding, ongoing development, performance management, retention, and total rewards – all of which can impact a network’s ability to scale with fidelity. Bellwether has a diagnostic instrument that we would be able to draw on and customize as needed; we can build our assessment via survey or interviews/ focus groups.

- C. We would begin to engage a select group of ILTexas *senior* stakeholders – Chiefs, area superintendents, Board members – in early touchpoints to introduce the strategic planning process and gather very preliminary inputs on key strategic questions (e.g., go-forward pace of growth/ expansion, high-potential strategic priorities). We would also want to confirm which select sub-group of campuses (targeting five or so schools) we would visit in-person or virtually for perspective on instruction, and therefore which leaders/ teacher groups we would engage in focused interviews, and initiate outreach/ scheduling; we would ideally “see” a range of grade bands, geographies, and school ratings (e.g., representative A, B/C, and D/F schools).

Deliverables for this phase would be:

- Detailed workplan, including schedule for site visits
- Document/ data request and fine sharing systems
- Stakeholder communications plan
- Draft of staff survey or interview guide (for focus groups)

Phase I. Needs assessment (6 weeks)

In this phase, Bellwether would partner with ILTexas leadership to collect both quantitative and qualitative data critical to shaping the network's long-term vision, expansion path, and Theory of Action/ strategic priorities. This assessment helps us diagnose key strengths, challenges, and opportunities, expand perceptions of what is possible, calibrate against other high-performing charter networks at a similar size/ scale or inflection point, and identify potential paths forward that we should explore in more detail.

We propose the following activities for this phase:

- A. We would prepare for and host a kick-off meeting with the ILTexas Steering Committee to gather reflections on the network's current strengths and gaps/ opportunities to address, as well as on the proposed expansion path. We would also address any outstanding questions about the process, including proposed site visits and stakeholder conversations.
- B. We would build an academics/ culture fact-base to analyze current strengths and gaps/ opportunities to address in this area. This work would be led by a Bellwether Academic & Program Strategy expert (e.g., Bill Durbin), who brings significant experience leading schools and coaching school leaders, and would include:
 - a. Reviewing ILTexas' current-state academic/ culture model; this would help assess where the instructional model is clear, aligned, and well-codified and where gaps remain
 - b. Assessing outcomes across the system over the past three to five years with an eye toward trends in growth and achievement outcomes across clusters, campuses, grade bands, subject areas, and/ or student populations
 - c. Conducting site visits, including classroom observations and interviews with teachers and school leaders, at a representative sample of schools to identify strengths and opportunities to increase the quality and consistency of instruction
 - d. Synthesizing the data to identify preliminary perspective on ILTexas' programmatic strengths, gaps, and areas of focus (especially as calibrated against state peers)
- C. We would build a non-programmatic fact-base covering human capital, organizational structure, operations, and finance to analyze current strengths and gaps/ opportunities to address in those areas. This work would include:
 - a. Reviewing ILTexas' organizational growth path and current footprint, and gathering perspectives on go-forward growth (with the incoming hypothesis of new market expansion to Austin and San Antonio in 2022 and, longer-term, to Corpus Christi, Laredo, El Paso, and the Rio Grande Valley)
 - b. Reviewing and summarizing ILTexas' current roles, responsibilities, and decision-making structures (including what is held at the network office, region, and campus level), as well as ILTexas' current governance structure
 - c. Reviewing and summarizing ILTexas' current operating systems, structures, and processes with an eye toward codification and scalability
 - d. Reviewing and summarizing ILTexas' current state human capital systems, structures, and processes across the human capital life cycle (as defined by Bellwether and consistent with researched best practices)
 - e. In close partnership with James Dworkin, reviewing and summarizing current financial processes; assessing ILTexas' current financial model and financial health, considering revenue streams (per pupil, grant, and philanthropic) and expenses over time; and identifying and beginning to plan for any changes required to the structure of the financial model
 - f. Synthesizing the data to identify preliminary perspective on ILTexas' non-programmatic strengths, gaps, and areas of focus
- D. As needed at this stage, we would conduct light research to develop a nuanced perspective of the Texas charter landscape and ILTexas' positioning in it. This work would include:

- a. Synthesizing data on current and anticipated charter supply/ demand in high-potential geographies for ILTexas
 - b. Conducting targeted interviews with a small number of external experts (e.g., Starlee Coleman, local intermediary leaders, funders with perspective on expansion of high-quality seats in Texas)
- E. We would prepare for and facilitate a working session with the Steering Committee (and the Board, either together or separately) to review the current state fact-base, identify key gaps/ opportunities to address as part of the strategic/ expansion plan, and develop/ refine anchoring concepts for the plan, including:
- a. Mission/ vision and profile of an ILTexas graduate (validating, not redefining, this core)
 - b. Growth path and intended impact (i.e., what outcomes ILTexas should seek to accomplish through this strategic plan)
 - c. Strategic priorities (i.e., what major efforts will be required in order for ILTexas to achieve its intended impact)

These concepts would be further explored and refined as part of subsequent phases.

Deliverables for this phase would be:

- In-depth needs assessment (including strengths, gaps, and opportunities) of the current state of ILTexas, informed by both quantitative (e.g., outcomes analysis) and qualitative input (e.g., staff focus groups)
- In-depth summary of school visits, with themes, priorities, and emerging recommendations
- Calibration against best practices from comparable CMOs around the country
- Emerging perspective on network-wide strategies/ efforts to prioritize

Phase II: Strategy development (10 weeks)

This phase, which would occur in close collaboration with the ILTexas leadership team, defines the specific priorities and initiatives to achieve the stated goals, and articulates the systems, structures, and resources needed to execute.

We propose the following activities for this phase:

- A. With input from the ILTexas leadership, we would finalize the growth path for the network: number of schools and likely locations (regions), as well as students served by grade band. We would also flag any potential implications of growth on the strategic priorities to ensure careful consideration in the development of the implementation plan.
- B. We would work closely with the ILTexas team to further define, and then evaluate, each high-potential strategic priority to better understand the feasibility and implications of each. Some priorities may be continuations of those previously identified, or focused on accelerating student achievement or improving operating efficiency and effectiveness; others may be “new” to the network and identified as critical needs to address a changing landscape. The priority development would be accomplished through desk research and targeted internal and external interviews to solicit input, gauge reactions to ideas, and inform specific elements of the ILTexas model. For each priority, we would:
 - a. Articulate the priority (including what must be true across the network versus what may look different across regions/ campuses)
 - b. Identify each priority’s goals and expected impact over the course of the plan
 - c. Identify component initiatives within each priority
 - d. Identify roles and responsibilities for priority- and initiative-level ownership
 - e. Estimate resources requirements/ investments for each initiative within a priority

Based on what we have heard from our preliminary conversation with ILTexas, we would expect to engage substantively in the following areas, and likely several others:

- a. *Strengthening the instructional model while “holding true” to ILTexas values and culture.* We would work to identify opportunities to further codify the instructional model, identify conditions for success for school start-up, and orient to closing gaps across subgroups – with a clear articulation of non-negotiables and guiding principles for the network. This would be accomplished through additional virtual or in-person site visits to schools, conversations with school, region, and network leaders, and best practice research/ benchmarking of high-performing CMOs grappling with related issues, especially those with non-traditional models (e.g., Montessori, applied learning/ project-based learning, dual-language).
 - b. *Updating the network structure for a larger, statewide organization with high expectations.* We would revisit the network office-region-campus organizational structure to clarify roles and responsibilities across each “tier,” considering how consistent – or autonomous – ILTexas would like the campuses to be across each function (e.g., instructional delivery, professional development, parent engagement). After developing a guiding philosophy for organizational design, we would revise the approach to staffing across the network, develop guidelines for network-wide communications, and define clear implications for goal-setting and accountability/ rewards. This would be accomplished through additional interviews with the ILTexas leadership team and school and superintendents, as well as best practice research/ benchmarking of large, high-performing CMOs (like IDEA, KIPP, or YES Prep) that have grown quickly over the past decade.
 - c. *Leveraging internal and external stakeholders, with an eye toward visibility and sustainability.* We would work to tell the ILTexas story to elevate its profile among key external leaders and decision-makers (e.g., funders, policymakers), while also building the Board’s capacity to do the same – and to shepherd a compelling long-term growth plan. Importantly, we would need to be clear on “why grow now” and “grow where,” both key elements of the strategy.
- C. For the development of each strategic priority, we would engage leaders according to plan, through targeted focus groups and interviews to gather input and feedback on emerging strategic priorities. We would want to consider how best to keep the network apprised of progress through communications and updates and, as needed, opportunities for targeted input.
- D. Based on the above, we would work closely with ILTexas operations and finance leaders to define and refine the operating model to support the identified approach, in sufficient detail to include in the financial model and describe in the strategic plan. Per any proposed network structure changes, we would develop a recommendation on any adjustments to the staffing structure needed to support the go-forward strategy, identify any changes that could/ should be piloted (e.g., new roles or staffing configurations), and develop a timeline and set of success criteria for launch.

We would provide feedback to ILTexas on updates to the financial model to reflect additions or changes from the emerging priorities, but would not expect to rebuild the model (i.e., we would use the existing financial tool as a starting point).

- E. We would build in multiple checkpoints with ILTexas to evaluate the full set of emerging priorities and ensure that they are comprehensive yet achievable/ feasible and well-sequenced. We would prepare for and facilitate at least two working sessions with ILTexas leadership to review detailed strategies, prioritize initiatives, and begin to surface implementation considerations. We would also imagine a read-out to the Board in the later weeks of this phase, providing a good perspective on the emerging plan and major strategic implications while keeping the door open to course corrections.

Deliverables for this phase would be:

- Detailed analysis of the major strategies to pursue, with alignment on critical priorities and the rationale behind each
- Detailed analysis of the activities, processes, resources, and partnerships required to support each strategy, including systems and structures

Phase III: Implementation planning (3-4 weeks)

In this phase we would prepare for thoughtful development and communication of next steps, as well as roll-out of the strategic plan.

We propose the following activities for this phase:

- A. In collaboration with the ILTexas team, we would develop a cross-priority implementation plan. This plan would illustrate the timing/ sequencing of strategic priorities and their component initiatives, define how success will be measured for each strategic priority and initiative, and set key targets (factoring in current measures and outcomes). We would work with the team to develop or update systems and structures required for ongoing management and monitoring of the strategy, including plans for continuous improvement cycles that connect to existing evaluation systems and structures.
- B. We would also support the ILTexas team to identify priority-level owners, and we would partner with those owners to build out detailed, priority-specific implementation plans that ensure the owner is well-equipped to lead the work moving forward. These priority-level implementation plans would identify detailed timelines for initiative implementation, as well as KPIs and targets. We would support priority owners to identify initiative-level owners, identify interdependencies, and embed important efforts in their implementation plans, including change management and continuous improvement cycles.
- C. We would work closely with finance leadership to identify any fundraising required to advance each strategic priority, and we would collaborate with development leaders to craft a fundraising plan to secure necessary resources. This would be accomplished through identification of potential sources of grants or foundation support aligned to ILTexas' strategic priorities as well as recommendations on communications materials (e.g., "pitch decks") and/ or key talking points for near-term fundraising activity.
- D. We would work closely with the ILTexas team to develop a communications plan and supporting materials for the roll-out of the final strategic plan. We would support ILTexas to identify key internal and external stakeholders with whom to share the plan, make recommendations about the communications vehicle(s) for engaging each stakeholder group, and make recommendations on communications materials and/ or key talking points to use for each engagement. We would focus attention on ensuring that the Board is fully aligned and sees its role in advancing the strategic priorities.
- E. We would prepare for and facilitate a final working session with the ILTexas team to review the master implementation plan, align on go-forward structures and processes for managing the plan and promoting continuous improvement, and prepare for ongoing communications and change management activity.

Final deliverables would be:

- Stakeholder engagement/ communications plan for the strategic planning process and the roll-out of the plan in 2021, as well as associated materials (talking points, memos describing the work, etc.)
- Synthesized fact-bases that reflect ILTexas' current state (programmatic and non-programmatic), as well as the external Texas landscape
- Five-year strategic plan (likely in PowerPoint format, but could also include a written narrative) to include:
 - ILTexas' unique mission, vision, and profile of a graduate/ commitment to students
 - A five-year intended impact statement, including proposed expansion path, and strategic priorities to achieve that impact

- o Overview of each priority, with detail on the component initiatives, goals, and timelines
- Organizational/ operational implications of the plan (e.g., a refined organizational structure)
- Financial implications of the plan
 - o Inputs to a flexible financial model, owned by the ILTexas finance team and to be used for analyzing impact of program decisions
- Detailed implementation plan to support strong management of the plan, including plans for continuous improvement and change management
- Summarized versions of the plan for key audiences (e.g., staff and potential funders)

Working together

We believe that a strategic planning process should be structured to proceed with urgency, but also to create the time and space to authentically engage stakeholders. In our role as facilitator and the "arms and legs" of the work, Bellwether designs the process, manages the project timeline around major milestones and deliverables, drives the data analysis and stakeholder conversations, conducts focused external research and gathers input from national and local thought leaders on best practices and innovation opportunities, surfaces strategic options and highlights trade-offs, and facilitates discussions related to key decisions. We 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 education reform organizations. While we facilitate a structured process, we do ensure that the work is tailored to the ILTexas context, so as to ensure we are focusing our time on the right questions, conversations, and proposed outcomes.

Though Bellwether will play the lead role in facilitating and informing the process, ILTexas stakeholders must be co-creators of the strategies for the plan. We expect the leadership team and Board of Directors to be important thought partners during the process, to look critically at current assumptions and strategies and, at times, make tough tradeoffs. We anticipate collaborating with the following groups throughout the project (and at the outset, we jointly define how best to work together):

Steering Committee: This team should be comprised of a small set of decision-makers, ideally no more than 6-8 leaders (e.g., Eddie Conger and the senior leadership team), who would play a significant role in reviewing the analysis and stakeholder feedback, sense-checking 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 then plays a significant role in creating stakeholder buy-in for the resulting strategic plan. While we will be mindful of making good use of this group's valuable time, we expect the commitment will be approximately 4-5 hours around each (roughly monthly) working session for document review and meeting participation. We may also request time on standing meeting agendas to update the group on progress or deep dive on a specific question.

This group should also be prepared to carve out time for periodic 1:1 and small group conversations throughout the work, especially regarding domain or geographic expertise, and to engage their teams regularly to share key messages and progress updates and gather substantive input to help shape the outcomes. This group would play an active, visible, vocal role in helping to fuel urgency, supporting desired engagement, and serving as "the face" of this work.

Project Lead: This person will be the primary contact for the project, and would likely be Aaron Thorson in his Chief of Staff role. Upfront, he will be most directly involved with facilitating information flow, including introductions to key staff and stakeholders; focus will then shift to reacting to draft output, providing feedback, participating in phone calls and working sessions, and debating recommendations. We would suggest scheduling weekly status calls with Aaron to cover a combination of process and content updates and jointly shape the work alongside our team. The expected time commitment would be 10-20 hours a week, give or take (especially at project launch and around the working sessions).

Board of Directors: 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 ongoing perspectives on key strategic planning questions. While we often see a subset of Board members participate on the Steering Committee, ILTexas could also consider treating the full Board as a standalone group, with read-outs at the end of Phase I and midway through Phase II. We support interim updates and opportunities for input with the Board as is helpful.

Academic and Operational Leaders: Key individuals within the organization will need to be involved with the creation and vetting of content, especially as we get into implementation planning. In particular, we would expect to interface with senior representatives from the Academics, Administrative, Operations, and Finance teams. (As an example, we will work closely with James Dworkin to support updates to the existing financial model in light of the emerging strategy; we would identify financial inputs, shape assumptions, and provide feedback on changes to the model.) We will also expect active involvement of Area Superintendents and Principals throughout the process, both to solicit feedback and to sense-check options as they are developed.

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 leaders who will need to make the plan happen.