



Date: April 24, 2019

To: Board Members

From: Kevin Sved

Re: Strategic Direction

### Introduction

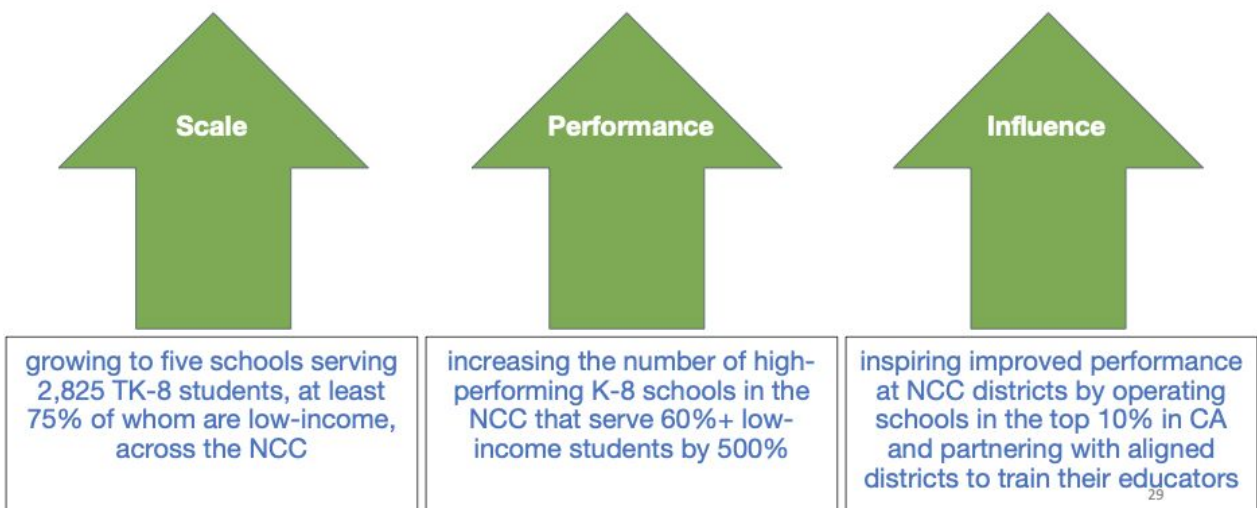
The state of public education faces extreme challenges. In California, over 1.5 million students in grades three through eight do not score proficient in English language arts. Most of those students score at the lowest possible level out of four. The vast majority of these students are low-income and children of color. Even more troubling, around 60% or 1.7 million children are also below standard in mathematics. In the face of these challenges, high-quality charter schools provide a bright spot, and Navigator Schools, among the highest performing schools in the Bay Area for low-income Latino students, are among the brightest.

Silicon Schools Fund and Charter Schools Growth Fund have made multi-million dollar investments in Navigator based on its success and potential for expanding impact. Navigator's Board of Directors made a bold commitment to expanding impact when approving the [Strategic Plan](#) in October 2017, with a plan to grow to a **scale** of 5 schools, maintaining high **performance**, and expanding Navigator's influence in the more traditional public schools. The approved impact statement is below:

## Our Future Impact



By 2022, Navigator will become a beacon for outstanding TK-8 education for underserved students throughout the NCC by:



The impact statement emphasizes Navigator's mission to make a difference for low-income students. This is part of our vision to eliminate the achievement gap. Navigator adopted a new mission statement, capturing the fire to equip students for college and beyond:

***Navigator Schools equips students to become learners and leaders in high school, college, and beyond. We develop top-tier teams of educators who continuously improve and innovate schools that deliver phenomenal outcomes for all students, regardless of their circumstances.***

Again, key strategies for impact named in the impact statement are:

1. SCALE: Growing more Navigator-run schools
2. PERFORMANCE: Running great schools
3. INFLUENCE: Helping other public schools become great (through dissemination)

For many reasons, it is time to revisit our impact statement and the strategies for achieving that impact. These reasons include not meeting our timeline for opening School 4, the changing charter landscape in California, and the strategic opportunities available for expanding our impact through a more thoughtful and strategic approach to dissemination (influence).

### **Objectives of Memo and Board Discussion on April 29**

The **main objective** of this memo is to help **prepare the Board to engage in a discussion regarding Navigator's future impact**, focusing on:

- Growing new Navigator-operated schools and
- Expanding impact through dissemination to improve learning at other public schools

Navigator's strategy consultant, Andrew Bray, will be facilitating a discussion that addresses the following four questions:

1. *How should Navigator adjust its growth strategy based on current realities?*
2. *How might Navigator positively impact the broader challenges facing public education in the State of California (while not negatively impacting Navigator-operated schools) through a strategic approach to dissemination?*
3. *Is a two-year Pilot Dissemination Project, beginning in 2019-20, worth doing?*
4. *What process and timeline should we have to make these decisions?*

### **GROWTH**

While we can celebrate that we are on track to open Watsonville Prep School (WPS) in 2019, we missed the timeline to open School 4 in 2020, which also pushes back our timeline to open School 5 by at least one year. The main reason for the delayed timeline for School 4 was the lengthy chartering process for WPS. Given the current status, we need to reevaluate the timeline for school growth, as well as the potential effects on our future Support Office (SO)

staffing plans and related multi-year projections. The plan to grow to five schools by 2021-22 featured support office expansion to support growth and continuous improvement, in anticipation of achieving an economy of scale by 2022-23, at which point private financial support would no longer be needed to fund the expanded SO. The annual disbursement for the \$2.1m multi-year grant from the Charter School Growth Fund will likely be adjusted based on impending modifications to Navigator's growth plan.

An additional challenge to our growth plan is the changing political environment regarding charters. The new governor and state superintendent are not as charter-friendly as previous office holders. The changing composition of the State Board of Education (SBE) will at best result in a smaller appetite for SBE approved charters. Changes at the state level have contributed to an emboldened charter opposition, resulting in calls for a moratorium on new charters and an increase in legislative actions that would threaten charter growth and sustainability.

This changing environment will make Navigator's plan for operating five schools increasingly difficult. It will be more important for Navigator to win approval at the district or county level. Staff has analyzed the current landscape, resulting in these findings:

- 1) While the environment will be more challenging for growth, we cannot accurately predict approval or denial at the district and county level without engaging communities and meeting with district and county board members.
- 2) The SBE will likely be less tolerant of considering charter appeals, but it is too early to assess how the SBE will treat high-performing charters like Navigator if a strong charter petition is denied by a very low-performing district.
- 3) Developing local support will require deeper community engagement work than Navigator has done in the past.

Based on these findings, staff recommends that we maintain our commitment to scaling to five schools, with the following proposed modifications:

- 1) We extend the the proposed timeline for growing to School 5 to 2024
- 2) We expand the geographical region for growth to increase the possibility of partnering with a supportive district authorizer
- 3) We deepen community and political engagement efforts to secure local support
- 4) We utilize dissemination efforts as a new strategy to develop positive relationships with potential authorizers.

In order to make the most of our time together on April 29, **please "stop and jot"** as you reflect on these questions:

- *How should Navigator adjust its growth strategy based on current realities?*
- *Do you agree with staff recommendations for adjusting the region, timeline, and strategy for growing new Navigator schools? Why or why not?*

While we believe that modifying our strategies relating to growth will result in achieving the goal of expanding to five schools, clearly there is greater uncertainty regarding growth than there was when the Board approved the plan. Due to this uncertainty, the time is right for Navigator to become more strategic about expanding impact through dissemination.

## **DISSEMINATION**

Growing schools is our best strategy for deep, high-quality impact on student achievement in California. However, to in order to make a significant positive impact on 1% of the 1.5 million or 15,000 California students in grades three through eight not scoring proficient in English language arts, Navigator would have to open 30 schools. Expanding Navigator's dissemination efforts could be a vehicle, over time, to help 30 low-performing schools become effective in serving those 15,000 students whereas opening 30 new charter schools would be unfathomable in today's climate.

From the beginning, Navigator has opened its doors and made time to share its learning with hundreds of public school educators, in whatever ways possible: conducting site visits, sharing flash drives, talking to principals, and going out of our way to disseminate our learning. We have done this as part of our mission to improve public education for all students. We have also done this because learning from others is at the core of Navigator's success. We learned about culture from KIPP, blended learning from Rocketship, small group rotations from Alpha, and coaching from Relay. We also learn from our visitors, as we always ask them for glows and grows, just like we provide in our weekly coaching for Navigators. The Navigator Way and our commitment to dissemination of knowledge is impacting students throughout California and across the nation.

While we have experience with more formal dissemination efforts (R.O. Hardin, Wonderful Prep) the reality is that Navigator will always be doing dissemination in some form, and the real need now is to **develop clear strategic direction about how and why we do dissemination, and how we will measure our success.**

Before sharing a more concrete vision for impact through dissemination for your consideration, **please take a moment to stop and jot as you reflect on this question:**

*How might Navigator positively impact the broader challenges facing public education in the State of California (while not negatively impacting Navigator-operated schools) through a strategic approach to dissemination?*

Before introducing a vision for consideration, I want to first acknowledge the thoughtful Board discussion regarding dissemination during the February meeting, as well as the questions and concerns shared by the Board over the last year. Concepts discussed by the Board significantly influenced staff's latest thinking in a multitude of ways, including:

1. The vision for dissemination needs to be clarified, along with desired outcomes, goals for impact, and measures of success.

2. The first and most important work that we do is run high-performing charter schools. Dissemination should not be done if it negatively impacts operation of existing schools.
3. Separating school management and dissemination work will help ensure that operation of existing schools is not distracted by dissemination.
4. Dissemination efforts can support Navigator’s growth initiative, with implications for partner selection.

The wisdom and experience of our board members is invaluable. I recognize and appreciate the heartfelt responsibly you hold in fulfilling your duties as trustees of Navigator’s mission. With the aforementioned as context, please consider the following as an initial offering and potential starting point for dialogue and exploration.

**A Vision for Dissemination: Helping Other Public Schools Implement the Navigator Model**

Imagine a child in Salinas. Imagine how reading and math proficiency changes the life trajectory of that child. Now imagine changing the trajectory for that child’s school of 500 students. Imagine ten poor-performing traditional California public schools adopting the Navigator model, providing 5,000 students with a strong foundation to thrive in high school and gain access to college and career opportunities that honor their human potential. Imagine impacting 30 schools and 15,000 students. Finally, imagine Navigator Schools providing the catalyst for this transformation as an economical service that all schools in need can afford.

**Possible Timeline for Expanding Impact through Dissemination**

	2019-20	2020-21	2021-22	2022-23	2023-24
Partner Schools	5	5	10	10	30
*FTE Navigator Coaches	0.5	0.5	1.0	1.0	3.0
Students Impacted	2,500	2,500	5,000	5,000	15,000
Success Measures	<ul style="list-style-type: none"> <li>● 90% of students exceed annual expected growth targets by at least 5%</li> <li>● Schoolwide 10 point increase in SBAC Proficiency after 2 years</li> <li>● 10% annual increase in school culture indicators</li> <li>● 90% of teachers meeting standard for data-driven instruction</li> </ul>				

\*FTE = Full Time Equivalentents

**Service Delivery Model**

Services to schools under this model will be delivered to partner schools through training and coaching, with extensive resources available through <https://www.navilearning.org/>. The model for school impact will look approximately like this:

Activity	Timeframe	Outcome
Leadership Training	3 days, July / August	Leaders will be able to: <ul style="list-style-type: none"> <li>❖ Lead observation/feedback meetings</li> <li>❖ Conduct effective classroom walkthroughs</li> </ul>
Teacher Training	3 days, August	Teachers will be able to: <ul style="list-style-type: none"> <li>❖ Launch classrooms with strong classroom culture</li> <li>❖ Prepare rigorous instruction aligned to weekly assessments</li> </ul>
Ongoing Site Visits	5 days per site	Leaders will be able to: <ul style="list-style-type: none"> <li>❖ Determine schoolwide action steps based on Navigator walkthroughs</li> </ul>
Weekly Leadership Team Zoom Coaching	One hour per site per week	Leadership team will: <ul style="list-style-type: none"> <li>❖ Review schoolwide academic data with Navi coach and develop action steps for improvement</li> </ul>
Weekly Principal Coaching Zoom	One hour per week	Principal will: <ul style="list-style-type: none"> <li>❖ Participate in weekly coaching and collaboration with Navi coach to review progress toward goals in culture, centers model, data-driven instruction, and leadership development</li> </ul>

In exploring the design of this possible model provision delivery system, we analyzed the amount of Navigator Staff time needed to provide this support to one school. **The key limiting design factor in scaling is the Navi-model principal leader with the expertise to coach principals.** Accordingly, the key issue in determining the scale of this provision design model is the number of principal coaches Navigator can develop without negatively impacting Navigator-operated schools.

Navigator’s strong internal leadership pipeline would be one source of principal coaches. A principal coaching pool would also grow from successful principals implementing the Navigator model at partner schools. While Principal Coaches could be part-time, coaching as few as one other principal, we also envision some being full-time Navi-model coaches, coaching as many as 10 principals at a time.

A possible timeline for scaled growth

The chart below shows how, with the modest start of Heather Parsons serving as a half-time principal coach in 2019-20, we can grow to support 30 partner schools in 2023-24 with as few as 3 FTE principal coaches.

	2019-20	2020-21	2021-22	2022-23	2023-24
Partner Schools	5	5	10	10	30
# FTE Principal Coaches	0.5	0.5	1.0	1.0	3.0

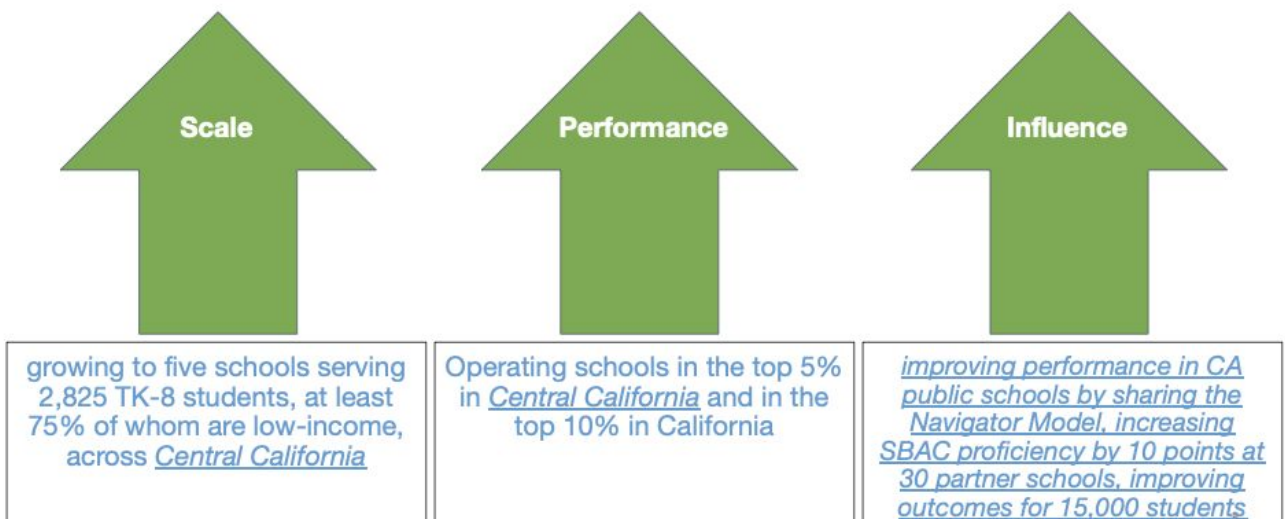
With the above proposed vision for dissemination in mind, **please take a moment to stop and jot as you reflect on these questions:**

- 1) Does this vision for dissemination resonate with you? Why or why not?
- 2) What do you think we need to learn over the next year or two to know if this design model could effectively scale to impact 10 schools in 2021-22?
- 3) By what process should we decide to go after this or something like it?

If we approve the suggested changes to the growth plans and adopt the vision above for a longer-term impact strategy through dissemination, a revised impact statement could look something like this:

## Our Future Impact *(For Discussion 4/29/2019)*

By 2024, Navigator will become a beacon for outstanding TK-8 education for underserved students throughout California by:



(Changes from the current impact statement are underlined)

To be clear, I am not recommending that the Board adopt this revised impact statement; rather, the request is for the Board to discuss what a long-term strategy could look like and decide on a process and timeline to make such a decision.

### Consideration of a Two-Year Dissemination Pilot

While our ideal process and timeline for piloting and testing our ideas about helping other public schools to implement the Navigator model would come after reaching clarity on the long-term vision for dissemination —with agreed upon metrics and timelines — the changing charter climate in California coupled with the strategic opportunities that Navigator has cultivated create an urgency that cannot be ignored. These opportunities include eager potential school partners

and a New School Venture Fund grant that we may be awarded in the next few weeks. During this period of existential threat to the charter school movement, we have **an opportunity for Navigator to take immediate strategic action to positively impact the broader challenges facing public education.**

If we do this work properly, not only will we extend our impact beyond our Navi borders, we will also strengthen our Navi model and improve our Navi-operated schools in a manner that would not otherwise be possible. In addition, the pilot project would be paid entirely by grant funds and partner fees. Furthermore, as we all have witnessed with the our recent approval by the CA State Board of Ed, our continued dissemination efforts will help pave the way for Navigator's own growth efforts and serve as the beacon of inspiration for district and charter collaboration.

In the hope that the Board will agree that a two-year pilot dissemination project is worthy of consideration, a staff report is included on the agenda. The pilot proposal describes working with up to five schools for the next two-years to test the proposed concept of supporting schools to implement the Navigator model as described above. The two-year pilot dissemination project would be led by Heather Parsons, with James Dent focused on supporting and managing the GPS, HPS, and WPS principals. The Executive Leadership Team and I believe this will positively impact existing Navigator Schools while increasing academic achievement for hundreds of students at partner schools.

I look forward to the discussion regarding the last question:

*Is a two-year Pilot Dissemination Project, beginning in 2019-20, worth doing?*