

Technical Assistant Provider Profiles

Lever 1: Establish and administer portfolio review and planning process

Eschbacher Consulting

Margo Roen

Cross & Joftus

RTI International

EdPlex

Taca Consulting

Fun Da Mentals for Education

Tembo, Inc

Kitamba, Incorporated

Lever 2: Develop and expand great schooling options

Cross & Joftus

Kitamba, Incorporated

Education Resource Strategies

Margo Roen

EdPlex

NACSA

Empower Schools Inc.

RTI International

Fun Da Mentals for Education

School Empowerment Network

Lever 3: Help families understand and navigate their school and program choices

Eschbacher Consulting

Kitamba, Incorporated

Cross & Joftus

RTI International

EdPlex

Tembo, Inc

Fun Da Mentals for Education

Lever 4: Build an ecosystem of effective school support and talent providers

Cross & Joftus

RTI International

EdPlex

Taca Consulting

Empower Schools Inc.

Lever 5: Reimagine central service offerings to support school based decision making

Afton Partners, LLC

Empower Schools Inc.

Caerus Management

Kitamba, Incorporated

Cross & Joftus

RTI International

Educational Resource Strategies

Taca Consulting

EdPlex

Lever 6: Align civic partners and engage the community

Cross & Joftus

Kitamba, Incorporated

EdPlex

RTI International

LEVER 1: ESTABLISH AND ADMINISTER PORTFOLIO REVIEW AND PLANNING PROCESSES

Brian Eschbacher:

Other Approved Lever: Lever 3: Help

Relevant Experience

Denver Public Schools

- Oversaw the development of the semi-annual Strategic Regional Analysis (SRA) that worked to identify gaps in access to quality seats in regional context.
- Expanded analysis on six primary areas: enrollment forecasts, facility utilization, school quality, student demographics, choice participation & access, and programmatic choice. In each of these areas the analysis assesses the gaps and provides recommendations for addressing them in the future.
- SRA is shared broadly with key stakeholders that allows the view of enrollment, where they are currently and where they are headed long-term.

Cross & Joftus:

Other Approved Levers: *Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

In addition to extensive portfolio management and review accomplished during his tenure in NYC, Rochester and Chicago, Mr. Jean-Claude Brizard and the Cross & Joftus team have conducted comprehensive needs assessments for a large number of districts, including Buffalo and Syracuse (NY), Camden City and Jersey City (NJ), Charlotte-Mecklenburg, Fairfield Suisun and Placentia Yorba-Linda (CA), districts across the state of Kansas, Lee County, Los Angeles, Grand Island and Omaha, NE.

Relevant Experience

Represented by Jean-Claude Brizard, Partner & Vice President

- Chief Executive Officer of Chicago Public Schools, 2011-2012
- Superintendent of Schools for Rochester, NY School District, 2008-2011
- Regional Superintendent, NYC Department of Education, 2006-2007
- Executive Director of Secondary Schools, NYC Department of Education, 2005-2006

EdPlex:

Other Approved Levers: *Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

EdPlex provides strategic consulting to schools, districts, and educational organizations with a focus on supporting rapid school improvement and district transformation.

Relevant Experience

EdPlex team members bring extensive experience working to develop school performance frameworks and then creating the district-level policy and practice that supports the use of frameworks to drive school performance.

Key Staff

Brenna Copeland, Founder & CEO

Founder & CEO, EdPlex - School Turnaround & Restart Work 2015-present

- Led a collaborative process among two school districts and two charter authorizers from around the country to adopt new best practices around identifying low-performing schools and restarting them with high quality school options
- Appointed member of Colorado's State Review Panel, which provides independent reviews and recommendations to the State Board of Education about what intervention would best support school improvement at low-performing public schools (both district schools and charter schools) in Colorado

Executive Director of Portfolio Management, Denver Public Schools, 2011-2015

- Developed portfolio review and planning processes on behalf of Denver Public Schools for district-wide reform efforts, including using the School Performance Framework to guide and inform all policy-level decision-making about whether to expand programs
- Led the annual Call for New Quality Schools process on behalf of the district, which prioritized needs for new schools based on the portfolio performance on the School Performance Framework
- Transformed qualitative review processes for both district and charter schools by introducing the school quality framework, that now guides qualitative review for all schools and serves as the foundation for the tiered approach to school supports

Connie Casson, Consultant

Adviser to Oakland Unified School District for School Performance Framework, 2014-2017

Executive Director of Accountability, Research, and Evaluation for Denver Public Schools, 2010-2013

- Led the department that designed and produced the School Performance Framework for Denver Public Schools, starting one year after the introduction of the framework
- Oversaw multiple changes and improvements to the framework, as well as negotiations with the state around overlap between statewide frameworks and the district-level framework

Deputy Strategy Officer for Denver Public Schools, 2007-2010

Rebecca Grant Zarret, Consultant

Director of School Turnaround & School Improvement Initiatives, Denver Public Schools, 2009-2015

- Worked with a cross-functional team to develop a system of tiering schools annually based on trends in the School Performance Framework to determine the level of additional funding, resources, and other supports schools were eligible to access.
- Worked with the district instructional leaders to develop systems for monthly data reviews and monitoring, and worked with initial drafts of Colorado state's school planning template to ensure it was used efficiently and productively by district schools.
- Collaborated across district departments to support the Call for New Quality Schools process as it related to finding replacement options for low-performing schools.

Fun da Mentals for Education:

Other Approved Levers: Lever 2: Develop, Lever 3: Help

Our mission is to change the face of urban education and their communities by responding to the needs of the learner, the teachers, the parents, schools, and their communities.

Relevant Experience

Key Experiences

- Designed and implemented Curriculum Institutes for Elementary, Middle and High schools.
- Created individualized school academic intervention programs using assessment data and other school information relative to instructional practices.
- Designed and created a collaborative team planning form to be used in content specific PLCs.
- Designed and implemented professional development evaluation forms to be used with all the campuses' staff developments.
- Designed a content minute model, which allowed teachers to optimize instructional time and create consistency during instruction across content areas.
- Collaborated on school master schedule
- Collaborated and created school's responsibility chart.

Key Staff

Dr. Malika Martin, Owner/Operator/Consultant

- Adjunct Professor, Houston Community College, 2010-Present
- Educational Consultant, Fundamentals for Education, LLC, 2013-Present
- Educational Consultant, Bradford Solutions, LLC, 2004-2013
- Mathematics & Science School Improvement Specialist, Spring Branch ISD, 2005-2008

Terrian Shackelford, Co-Owner, Consultant

- Adjunct Instructor, LeNotre Culinary Institute, 2014-Present
- Educational Consultant, Fundamentals for Education, LLC, 2013-Present
- Consultant & Tutor, Bradford Solutions, LLC, 2004-2013
- Mathematics Teacher, Houston ISD, 1995-2004

Elaine Lewis, Consultant

- Educational Consultant, Houston ISD, 2014-Present
- High School Principal, Houston ISD, 2009-2014
- Dean of Instruction, Houston ISD, 1998-2009

Mark Spillman, Consultant

- Educational Consultant, Fundamentals for Education, LLC, 2014-Present
- Adjunct Instructor, University of Houston Downtown, 2013-Present
- Instructional Coach, Houston ISD, 2015-2017
- Dean of Instruction, Woodson K8, 2013-2015

Kitamba, Incorporated:

Other Approved Levers: Lever 2: Develop, Lever 3: Help, Lever 5: Reimagine, Lever 6: Align

From our early days providing strategic counsel to reform-minded educational and philanthropic organizations, Kitamba has grown into a full-service firm offering strategic consulting and implementation support, product development, and investment and advisory services. We've delivered lasting impact to dozens of school districts, education technology companies, and foundations in the US and abroad. Our expertise in charter schools, data innovation, and strategic finance make us the go-to firm for organizations seeking smart, hands-on support.

Relevant Experience

Key Experiences

- Design, development and execution of school portfolio review and planning processes.
- Led the development and incorporation of a data-driven and contextualized portrait of student opportunities and needs that drives programmatic decision making, and involves looking at existing models or programs, community-driven demand for themes or topics, as well as identifying new models and public school types to activate the supply of high quality schools in a district or city.
- Led consulting support for all or critical components of the school portfolio review and planning process in 7 large urban districts in the Northeast and Mid-Atlantic regions that collectively serve approximately 1,300,000 students.

Key Staff

Rajeev Bajaj, CEO & Partner

- Led design, development and execution of school portfolio review and planning processes.
- Led development and incorporation of a data-driven and contextualized portrait of student opportunities and needs that drives programmatic decision making, and involves looking at existing models or programs, community-driven demand for themes or topics, as well as identifying new models and public school types to activate the supply of high quality schools in a district or city.
- Led consulting support for all or critical components of the school portfolio review and planning process in 7 large urban districts in the Northeast and Mid-Atlantic regions that collectively serve approximately 1,300,000 students.

Collin Moore, Chief of Staff & Senior Project Manager

- Managed and supported the design, development and execution of school portfolio review and planning processes.
- Managed and supported the development and incorporation of a data-driven and contextualized portrait of student opportunities and needs that drives programmatic decision making, and involves looking at existing models or programs, community-driven demand for themes or topics, as well as identifying new models and public school types to activate the supply of high quality schools in a district or city.

Margo Roen:

Other Approved Levers: *Lever 2: Develop*

Relevant Experience

Deputy Superintendent/Chief of Strategy & Portfolio Management, Tennessee Achievement School District, 2011-2017

- Oversaw the vision, design, and execution of the Achievement School District's School Performance Framework and School Actions Framework to increase the number of high quality seats in Tennessee.
- Oversaw the creation of portfolio planning analysis designed to identify gaps in the portfolio, targeting schools in need of intervention and making operator replication and expansion decisions.
- Built the ASD's internal performance and practice teams, as well as external data and shared learning partners (e.g., external researcher partners, state department of education, nonprofit partners).
- Developed the ASD's annual research and learning agenda.

Systems Director/Co-Assistant Principal, New Orleans Charter Science and Math HS, 2006-2010

- Developed school-wide systems to support innovation, teacher autonomy and development, and instructional data cycles.

RTI International:

Other Approved Levers: *Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

RTI is an independent, nonprofit institute that provides research, development, and technical services to government and commercial clients worldwide. Our mission is to improve the human condition by turning knowledge into practice

Relevant Experience

Knightdale High School, Collaborative Design School Redesign Project

- Facilitated and advised the district to complete a comprehensive high school redesign based on a “feeder-pattern” approach involving the principals of elementary and middle schools that feed into the high school.

Johnston County Schools, Project-Based Learning (PBL) Project

- Supported a district-level task force focused on developing teachers to support a self-directed PBL performance framework.
- Supported a central office to assess and match schools from a district portfolio to participate in an instructional initiative.
- Developed an aligned assessment, planning and implementation process.

Key Staff

Dr. Angela Quick, Senior Education Consultant

- Senior Vice President/Interim CEO, NC New Schools, 2013-2016
 - Created, implemented, and monitored a 20-million-dollar i3 federal grant
- Deputy Chief Academic Officer & Academic Services and INstructional Support, North Carolina Department of Public Instruction, 2008-2013
 - Facilitated all curricular and assessment programming

Dr. Kaleen Healey, Senior Education Consultant

- Research Scientist, University of Chicago Consortium on School Research, 2012-2016
 - Designed and implemented mixed-method studies

Dr. Laurie Baker, Senior Education Consultant

- Senior Director of Client Services, NC New Schools/Breakthrough Learning, 2015-2016
 - Managed national expansion activities and programmatic oversight for a \$20M grant.
- Director of School Services, North Carolina New Schools, 2013-2015
 - Led national expansion to develop the capacity of schools and districts to create opportunities for traditionally underrepresented students to graduate

Dr. Robin Wisniewski, Senior Education Consultant

- Director of Research and Consulting, McREL International, 2012-2015
- Director, University of Arizona, 2011-2012
- Director (Founding), Baldwin-Wallace University Berea, 2005-2011

Taca Consulting:

Other Approved Levers: *Lever 4: Build, Lever 5: Reimagine*

Relevant Experience

Key Experiences
<ul style="list-style-type: none">• Oversaw the instructional and operational activities at four Baltimore public STEM schools.• Developed the core components of the academic model including school improvement planning tools, school evaluation rubrics, and ways to monitor instructional quality.• Led the team of field consultants to develop school and district effectiveness frameworks that diagnosed school and district performance.• Led an engagement team that developed a school improvement planning and performance monitoring process for a set of schools that was later replicated and scaled across the district.• Led a process where worked with school management leadership, state school-improvement leaders, and school leadership to develop a planning and monitoring process that memorialized and assessed progress schools were making against plans and benchmarks set collaboratively between schools and central office.

Key Staff

Christopher Maher, Consultant
<ul style="list-style-type: none">• Superintendent of Providence Public School District• Mass Insight Education
Ami Magunia, Consultant
<ul style="list-style-type: none">• Engagement Director, Mass Insight Education, 2012-2015<ul style="list-style-type: none">○ Changed Indiana state policy to reflect the inclusion of the internal lead partner model as a school improvement model.○ Designed and launched a knowledge management platform• Manager of School-Based Staffing and Recruitment, Baltimore City Public Schools, 2010=2011<ul style="list-style-type: none">○ Doubled number of applicants for teacher-level positions by implementing new recruitment strategies○ Developed a rigorous, competency-based selection process for all teacher-level staff• Special Assistant to the Chief Human Capital Officer, Baltimore City Public Schools, 2010<ul style="list-style-type: none">○ Created and implemented the operational implementation of a competency-driven assessment process for school leadership○ Implemented key recruitment and selection strategies to ensure 31 school leadership vacancies were addressed○ Developed internal process to implement ground-breaking teacher contract that aligned performance with compensation

Tembo, Inc:

Other Approved Levers: Lever 3: Help

Our mission is to help education agencies better define, communicate, and drive school quality and educational equity. As a team, we are deeply committed to making education data clear, accessible, and actionable. Whether building interactive web tools for the public or developing data modelling tools for administrators, our team helps organizations leverage data to make more informed decisions.

Relevant Experience

Key Experiences

- **Extensive experience developing accountability models with states and districts.** Tembo has collaborated with several education agencies across the country to develop, implement, and audit performance frameworks. We consider this work core to our organization. Most recently, we have worked with Indianapolis Public Schools, DC's State Superintendent, the School District of Philadelphia, the TN State Board, and Shelby County Schools (Memphis) to create performance frameworks.
- **Clear understanding of multiple stakeholder groups involved.** Based on this experience, we push our clients to think carefully about the intersection between idealism and pragmatism – building performance frameworks that not only support clear and consistent measures of school quality, but ones that are equally built upon reliable and valid data.
- **Proprietary system for helping clients through the process.** Tembo has developed a performance framework development 'playbook' with clear steps to guide LEAs through the process. These steps outline key practices, a recommended sequence for decision-making, and key data dependencies. They are broadly summarized as:
 - Creating a common definition of quality and aligning to strategic/organizational goals
 - Developing innovative measures aligned to the definition of quality, including mechanics for calculation (e.g. data availability, business rule development)
 - Creating a plan for data collection and cleaning (we can provide cleaning support if required)
 - Calculating metrics (we can calculate if required)
 - Testing and refining metrics after we run analyses like year-over-year stability, correlations, etc.
 - Creating a scoring framework (see description below)
 - Testing framework results and refining after we run analyses like stability over time, sensitivity analyses, etc.
 - Finalizing framework and calculating results
- **Off-the-shelf software to support data and analytic work.** Tembo has also created an online tool that allows LEAs to quickly and easily design custom performance rubrics based on their real data. We built this tool after working with LEAs to model the *many* scoring decisions required in a performance framework, and wanted administrators to have access to a simple, user-friendly modelling tool. The tool, called BUILD, guides the user through scoring decisions and in real-time provides a preview of simulated school results. As a result, administrators can quickly understand the trade-offs between competing definitions of quality. With the click of a button, users can make a series of complicated decisions around n-size, missing metric handling, floors and targets, weights, and performance level cut points, and they are handled instantly in the data. Once you finalize your framework, the tool will download all calculated results.

Key Staff

David Stewart, Founder & CEO

- Founder & CEO, Tembo, Inc., 2010-2017
 - Built the company from a one-person consultancy to an organization that currently employs 15 in three different states
 - Successfully implemented more than 50 projects in more than 10 different states
- Executive Director, Evaluation and Performance Reporting & Director of Analytics, New York City Department of Education, 2007-2009
 - Managed the development and implementation of the School Progress Reports, Learning Environment Surveys, and School Quality Reviews
 - Defined methodology and business rules to evaluate school performance
 - Provided analytic support to Chancellor and Chief Accountability Officer
- Vice president of Product Development and Research, The Grow Network/McGraw-Hill, 2005-2007
 - Led all phases of product development process including discovery, business case development, field-testing, and development of functional requirements
 - Managed design, product development, research, and psychometric teams
 - Provided product and project management support to key clients in New Mexico, New York City, Chicago, and Qatar

Michael Moore, Chief Operating Officer

- Chief Operating Officer, Director of Product Design, Tembo, Inc., 2012-2017
 - Oversaw development of BUILD from first prototypes through to final v1.0 live on the web
 - Supported accountability model design and production for multiple clients, including Baltimore City Public Schools and the School District of Philadelphia, conducting stakeholder engagement, metric development, metric calculation, report design, and report production.
- Research Assistant, Center for Policy Research in Education, 2011-2012
 - Developed online data collection tools, conducted interviews and analyzed participant data
- Editor-in-Chief, Perspectives on Urban Education, 2010-2012
 - Doubled submission rate and improved readership by 50%

Sabrina Yusuf, Engagement Leader

- Engagement Leader, Tembo, Inc., 2015-2017
 - Led the development of a school accountability framework for Indianapolis Public Schools to support portfolio planning and decision-making
 - Led the development of a school accountability framework for the Office of the State Superintendent of Education (OSSE) in Washington, D.C. for submission as part of the state's ESSA plan
 - Led the development and implementation of a School Finder and School Profiles in Indianapolis to support school choice and the launch of a universal enrollment system
- Strategic Data Fellow, Harvard University, Center for Education Policy Research, 2013-2015
 - Acted as a resource for agencies developing and implementing performance management tools
- Manager, Office of Strategic Analytics, School District of Philadelphia, 2011-2015
 - Led the development and implementation of the School Progress Report (SPR), a unified accountability tool designed to assess the quality of educational programming in Philadelphia's traditional and charter public schools

LEVER 2: DEVELOP AND EXPAND GREAT SCHOOLING OPTIONS

Cross & Joftus:

Other Approved Levers: Lever 1: Establish, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align

Cross & Joftus supports creating the conditions and supports to improve the capacity of school systems to innovate and invest which often lead to new schools and programs as well as, the ability to replicate and expand existing successful programs. At C&J we envisioned a system of great schools that takes responsibility for student achievement and focus on creating the system-wide conditions necessary to grow great schools and keep them continuously improving. Barriers and obstacles to improvement – within and across schools – need to be removed and replaced by conditions for success that enable dynamic improvement of the entire portfolio and of individual schools.

Relevant Experience

Represented by Jean-Claude Brizard, Partner & Vice President

- Chief Executive Officer of Chicago Public Schools, 2011-2012
- Superintendent of Schools for Rochester, NY School District, 2008-2011
- Regional Superintendent, NYC Department of Education, 2006-2007
- Executive Director of Secondary Schools, NYC Department of Education, 2005-2006

EdPlex:

Other Approved Levers: *Lever 1: Establish, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

EdPlex provides strategic consulting to schools, districts, and educational organizations with a focus on supporting rapid school improvement and district transformation.

Relevant Experience

The EdPlex team has a shared track record from their time together at Denver Public Schools in support of strong authorizing policies and practices. Denver uses authorizing practices for both charter and district-run innovation schools. Team members collaborated to ensure that Denver made progress towards its strategic plan and the central goal of that plan, to have great schools in every neighborhood.

Key Staff

Brenna Copeland, Founder & CEO

NACSA Quality Authorizing Review Expert, 2015-present

- Conducts quality reviews of school districts around the country, analyzing their charter authorizing practices and making recommendations to improve their portfolio management practices

Executive Director of Portfolio Management, Denver Public Schools, 2011-2015

- Led the creation of revised district authorizing policies, including the introduction of new policies to ensure charter schools served equitable numbers of students with disabilities and received equitable funding
- Led all contracting negotiations with charter schools district-wide
- As the lead for the annual Call for New Quality Schools process in Denver, provided school design support for applicants (especially district principals seeking to establish new district-run schools)

Co-Founder and COO, Center City Public Charter Schools, 2007-2010

- Co-founded and led a new organization to take over seven inner city Catholic schools and turn them into public charter schools to ensure that they could continue to serve high poverty regions of the city with a quality education program

Rebecca Grant Zarret, Consultant

Director of School Turnaround & School Improvement Initiatives, Denver Public Schools, 2009-2015

- Secured \$30M in federal resources to turnaround or replace low performing schools.
- Built internal organizational supports within the district to ensure schools in turnaround status could make the needed changes and thrive.
- Coordinated school diagnostic, school planning, and professional development supports to support school leaders and staff in the turnaround process.

Special Assistant to the Superintendent, Austin ISD, 2009

Executive Intern to the Superintendent, Fort Worth ISD, 2008-2009

- Worked with key stakeholders, including direct work with school leadership teams to develop a plan to turn schools around that were identified at the state level as requiring intervention (FWISD and AISD).

Marissa Ferrari, Consultant

Director of Marketing, Denver Public Schools, 2009-2014

- Launched Denver's unified enrollment system -- developed the district's comprehensive internal and external communications strategy, and all multi-lingual "school chooser tools" -- print guide, school finder website, animated video, school fairs, etc.
- Helping families understand and navigate their school and program choices
- Developed and implemented district-wide, regional, and school-specific communications aimed at helping families assess school performance, programs, culture, and other indicators of quality.
- Developed the organizational structure to support this work: creating, hiring, and managing a team of regionally-based marketing specialists who focused on a cohort of schools as well as contributed to regional and district-wide strategies.

Education Resource Strategies:

Other Approved Lever: *Lever 5: Reimagine*

Education Resource Strategies (ERS) is a non-profit organization dedicated to transforming how urban school systems organize resources—people, time, technology, and money—so that every school succeeds for every student.

Relevant Experience

Charlotte-Mecklenburg Schools

- Provided significant school design support to principals including data analysis, research, case studies, trainings, panel discussions, and consultations.
- Created a resource map to build a transparent fact base around how resources are distributed and used across the district.
- Developed 3-5 page school-level resource use reports.
- Created a series of 19 school design templates based on common challenges.
- Developed capacity to generate the school-level resource use reports

Key Staff

Karen Hawley Miles, President and Executive Director

- Independent Consultant 1993-2004
 - Consulted and supported urban school districts and reform organizations in strategic resource use and allocation, instruction concerning resource use, leadership development, and curriculum development.
- Management Consultant, Boston Public Schools and Mayor's Office
 - Identified opportunities to reallocate over \$15 million towards educational priorities.

Stephen Frank, Co-Founder & Partner

- Strategy Consultant, Bain & Company, 2000-2002
- Partner, Education Resource Strategies, 2002 to Present
- Heads ERS research, methodology, and data analytics; and state practices.
- Has led strategy development projects in Texas (Aldine, El Paso, and Spring Branch) and across the country, including Los Angeles, Chicago, Washington D.C., Baltimore, Atlanta, Syracuse, Rochester, Buffalo, St. Paul; Prince George's County, MD, Tulsa and elsewhere.
 - Has worked with state departments of Education in TN, Louisiana, NY and Georgia.

Joseph Trawick-Smith, Principal Associate

- Fellow, Education Pioneers, 2010
 - Assessed data and technology needs of stakeholders in the corporate, government, and nonprofit sector
- Assistant Manager, Steeldeck, 2007-2009
 - Coordinated the dispatch of event services for over one thousand high-end production jobs
 - Developed an internal control system and information database

Nicole Katz, Principal Associate

- Dean of Curriculum and Instruction, UP Academy Holland, 2014-2015
 - Developed curriculum for grades K1, K2, and 1st at UP Academy Holland, a turnaround elementary school
- Instructional Coach for Mastery Charter School, Philadelphia, PA 2011-2014
- Leadership Resident Kindergarten Staff Developer, Kindergarten Teacher, & Second Grade Teacher; Success Academy Charter School, New York City, NY, 2006-2011
- Second Grade Teacher, PS 242, New York City, NY 2003-2006

Tara Anderson, Principal Associate

- Education Pioneers Fellow, Caliber Schools, Richmond, California, 2015
 - Developed school-wide strategy to make teaching at Caliber more data-driven
 - Created tools, protocols, and training materials for teachers to analyze data from online learning to develop instructional action plans
- Elementary School Teacher, West Contra Costa Unified School District, Richmond, California, 2009-2011
 - Served as a support coach for beginning teachers
 - Acted as school director for a summer enrichment program for low-income middle school students

Empower Schools:

Other Approved Lever: *Lever 4: Build, Lever 5: Reimagine*

Empower Schools partners with communities to help them get the schools they want with the results students need. We believe schools and communities thrive when educators are empowered and held accountable for making the key decisions at the school level that are best for students. We have developed Empowerment Zones as structures that create and sustain the conditions enabling empowered schools. Zones are clusters of autonomous schools within a district that are supported by a non-profit that builds the capacity of school leaders, brokers technical assistance, and ensure strong results via a performance management framework. Empowerment Zones are part of a national Third Way movement that leverages and fuses the best of districts and charters to help students, especially disadvantaged ones, succeed.

Relevant Experience

Bentley Elementary School - Salem Massachusetts

- In Salem, Empower partnered with the local district to help turnaround Bentley Elementary School. Through this work Empower:
 - Developed autonomy-enabling contracts between the school and school board
 - Recruited strong school leadership
 - Helped establish an ongoing partnership with Blueprint Schools Network to support the school
- After two years, the school's accountability rating moved from Level 4 (designated low - performing) to Level 1, the best possible state accountability determination.

Springfield Empowerment Zone Partnership (SEZP) - Springfield, Massachusetts

- In Springfield, Empower partnered with the state education agency, Springfield Public Schools, and the Springfield Education Association (the local teachers' organization) to help turnaround and transform ten struggling schools, with the goal of developing and expanding great schooling options within Springfield. Empower:
 - Designed and operationalized the Empowerment Zone's strategic plan and coordinated the launch and first year implementation of the project
 - Lead in designing the initial process through which schools codified their academic models and also helped create a strong support structure for all schools within the Zone to ensure that they collaborate effectively and have access to high-quality coaching on how to be an effective autonomous leader
 - Facilitated the recruitment of three promising leaders who received in-depth training and design support in order to launch new school programs with one grade of students at a time
 - Supported the re-imagining of a large struggling high school. This project will likely include programs such as early college, Linked Learning (high quality, project-based CTE), and other innovative efforts to provide more great schooling opportunities for high school students
- Year 1 efforts have built a solid foundation for success. Results show modest gains for students, and teacher and parent feedback is positive. The Zone has a strong and collaborative relationship with the district and best practices are being spread across Zone schools and into the district.

Luminary Learning Network (LLN) - Denver, Colorado

- Empower partnered with Denver Public Schools and the Gates Family Foundation to launch the Luminary Learning Network with four successful schools in Denver.
- Empower worked to set up structures that ensured continued autonomy and academic progress at these schools such that they remain great schooling options for students.

- Several additional Denver schools have since applied to join the Luminary Learning Network as they seek to enhance school-level autonomies and improve their schools.

Key Staff

Brett Alessi, Co-Founder & Managing Director

- Co-Founder & Managing Director, Empower Schools (2014-Present)
 - Leads Empower's work in Colorado
- Managing Director of New Initiatives, Massachusetts 2020 Foundation (2012-2013)
 - Partnered with Lawrence Public Schools Receiver and Massachusetts Department of Elementary and Secondary Education to craft district-wide turnaround strategy based on the portfolio model of high autonomy and high accountability schools, resulting in a 40 percentage point increase in the share of Lawrence Public Schools attending Level 1 and Level 2 schools.
- Executive Director of Greater Boston and New England, Education Pioneers (2008-2012)
- Began his career as a classroom teacher before helping to start a think tank focused on youth civic engagement in Washington DC.

Chris Gabrieli, Co-Founder, CEO

- Co-Founder and CEO, Empower School (2014-Present)
 - Leads Empower's work in Massachusetts and Tennessee
- Co-Founder and Chairman, Transforming Education (2011-Present)
- Lecturer, Harvard Graduate School of Education (2009-Present)
- Chairman, Massachusetts Board of Higher Education & Springfield Empowerment Zone (2015-Present)
- Chairman, National Center on Time & Learning/Massachusetts 2020 (2000-2015)

Joe Rull, Senior Director

- Senior Director/Technical Assistance Coach, National Center on Time and Learning (2008-2016)
 - Coached schools in Massachusetts and across the country on effective practices for both planning and implementation of expanded learning time
- School Change Coach, Center on Secondary School Redesign (2007-2009)
 - Provided on site coaching for high schools
- Superintendent of Schools, Weymouth Public Schools (2004-2007)

Matt Matera, Program Director

- Program Director, Empower Schools (2014-Present)
 - Helped create and manage the Springfield Empowerment Zone Partnership and led the design, launch, and initial operation of the Zone
- Director of Innovation and Talent, Lawrence Public Schools (2013-2014)
- Director of Human Capital Investments, New Schools for New Orleans (2011-2013)
- Language Arts Teacher, Murdoch Middle School at Innovation Academy Charter School (2005-2008)

Alyssa Schechter, Manager of Strategic Growth

- Manager of Strategic Growth, Empower Schools (2016-Present)

- Supports Empower's work with potential new partners in Massachusetts and Tennessee
- Analyst, Education Pioneers (2013 & 2015)
- Senior Associate Consultant, Bain & Company (2010-2014)

Sarah Robb, Senior Program Manager

- Senior Program Manager, Empower Schools (2015-Present)
 - Provided direct programmatic and implementation support to the Springfield Empowerment Zone Partnership
- Analyst, TNTP (2014-2015)
- Program Manager, City Year San Jose/Silicon Valley (2011-2013)
- Biology Teacher, Dusable Leadership Academy (2009-2011)

Fun da Mentals for Education:

Other Approved Levers: *Lever 1: Establish, Lever 3: Help*

Our mission is to change the face of urban education and their communities by responding to the needs of the learner, the teachers, the parents, schools, and their communities.

Relevant Experience

Key Experiences

- Created and collaborated on school's content specific non-negotiables.
- Created an Accountability and Responsibility Guide to be used in all of our Academic Academies.
- Designed and collaborated on an Enrichment/Remediation Summer Workshop for incoming 9th grade students.
- Designed and implemented a meet and greet social for students and parents participating in our Academic Academy.
- Designed and implemented a "Enhancement Models" that is designed to help teachers improve and enhance their instructional practices based on their individual needs.
- Designed and implemented "Master Mathematics Programs" for Elementary, Middle, and High schools.

Key Staff

Dr. Malika Martin, Owner/Operator/Consultant

- Adjunct Professor, Houston Community College, 2010-Present
- Educational Consultant, Fundamentals for Education, LLC, 2013-Present
- Educational Consultant, Bradford Solutions, LLC, 2004-2013
- Mathematics & Science School Improvement Specialist, Spring Branch ISD, 2005-2008

Terrian Shackelford, Co-Owner/Consultant

- Adjunct Instructor, LeNotre Culinary Institute, 2014-Present
- Educational Consultant, Fundamentals for Education, LLC, 2013-Present
- Consultant & Tutor, Bradford Solutions, LLC, 2004-2013
- Teacher, Houston ISD, 1995-2004

Elaine Lewis, Consultant

- Educational Consultant, Fundamentals for Education, LLC, 2014-Present
- High School Principal, Houston ISD, 2009-2014
- Dean of Instruction, Houston ISD, 1998-2009

Mark Spillman, Consultant

- Educational Consultant, Fundamentals for Education, LLC, 2014-Present
- Adjunct Instructor, University of Houston Downtown, 2013-Present
- Instructional Coach, Houston ISD, 2015-2017
- Dean of Instruction, Woodson K8, 2013-2015

Kitamba, Incorporated:

Other Approved Levers: *Lever 1: Establish, Lever 3: Help, Lever 5: Reimagine, Lever 6: Align*

From our early days providing strategic counsel to reform-minded educational and philanthropic organizations, Kitamba has grown into a full-service firm offering strategic consulting and implementation support, product development, and investment and advisory services. We've delivered lasting impact to dozens of school districts, education technology companies, and foundations in the US and abroad. Our expertise in charter schools, data innovation, and strategic finance make us the go-to firm for organizations seeking smart, hands-on support.

Relevant Experience

Key Experiences

- Helped identify and design innovation zone networks and related structures allowing for high quality existing schools to further expand.
- Worked with external providers to recruit and support them in a new geography.
- Led consulting support for developing and expanding great schools in 6 large urban districts in the Northeast and Mid-Atlantic regions that collectively serve approximately 1,300,000 students as well as 1 state serving ~330,000 students.
- Worked with 9 either non-profit intermediaries or Charter Management Organizations on the development of expansion of great schooling options.

Key Staff

Rajeev Bajaj, CEO & Partner

- Helped identify and design innovation zone networks and related structures allowing for high quality existing schools to further expand.
- Worked with external providers to recruit and support them in a new geography.
- Led consulting support for developing and expanding great schools in 6 large urban districts in the Northeast and Mid-Atlantic regions that collectively serve approximately 1,300,000 students as well as 1 state serving ~330,000 students.
- Worked with 9 either non-profit intermediaries or Charter Management Organizations on the development of expansion of great schooling options.

Erin McGoldrick Brewster, COO & Partner

- Led data and accountability office in Washington D.C., developed accountability framework for D.C. schools, led evaluations and supported implementation of data driven culture including training, data analysis, and other data-related initiatives for all school stakeholders.
- Supported and project managed portfolio process and annual portfolio management cycle in large urban districts in the northeast.

Collin Moore, Chief of Staff & Senior Project Manager

- Helped identify and design innovation zone networks and related structures allowing for high quality existing schools to further expand.
- Worked with external providers to recruit and support them in a new geography.
- Managed and provided consulting support for developing and expanding great schools in 6 large urban districts in the Northeast and Mid-Atlantic regions that collectively serve approximately 1,300,000 students as well as 1 state serving ~330,000 students.
- Worked with 9 either non-profit intermediaries or Charter Management Organizations on the development of expansion of great schooling options.

Mark Viehman, Director of New Ventures & Senior Project Manager

- Managed all aspects of budget cycle and strategic finance in Newark, New Jersey including school based budgeting, staffing projections and analysis

Margo Roen:

Other Approved Levers: *Lever 1: Establish*

Relevant Experience

Deputy Superintendent/Chief of Strategy & Portfolio Management, Tennessee Achievement School District, 2011-2017

- Oversaw the vision, design, and execution of the district's new schools functions including applicant cultivation, operator recruitment, and the creation of rigorous authorization practices, school opening supports, and operator-school matching.
- Built the ASD's internal authorization and oversight teams, and created a bench of high quality external new schools partners and authorization specialists (including the state education department and nonprofit partners)
- Secured large grants from local and national funders to support new schools pipeline development and authorization processes for the district, including the recruitment and vetting of high performing local and national CMOs.

Systems Director/Co-Assistant Principal, New Orleans Charter Science and Math HS, 2006-2010

- Founding team member of New Orleans's first charter high school post-Hurricane Katrina.

National Association of Charter School Authorizer:

The National Association of Charter School Authorizers work to increase and improve quality educational opportunities for children by strengthening charter school authorizing.

Relevant Experience

Miami-Dade County Public Schools
<ul style="list-style-type: none">• Developed key strategies, policies, and tools focused on expanding the highest quality programs in its portfolio, specifically considering local community needs.• Supported in several areas, leading to the development of strong policies and practices.• Worked with Miami-Dade to create a differentiated oversight system that will allow the district to focus more on outcomes and expand and replicate the highest performing schools in its portfolio.
Orleans Parish School Board (OPSB)
<ul style="list-style-type: none">• Supported OPSB in several areas, leading to the implementation of 12 of 12 Essential Practices by 2015.• Developed contract language, revised policies referencing the performance framework, and tools for capturing financial and organizational performance information.
Cleveland Metropolitan School District (CMSD)
<ul style="list-style-type: none">• Supported organizational planning efforts• Developed and implemented a tailored CMSD strategy that included chartering as one of many touch points in Cleveland's portfolio strategy.

Key Staff

Elisa Westapher, Director of Authorizer Development
<ul style="list-style-type: none">• Consultant, Education Systems Center at Northern Illinois University, 2014-Present• Associate, Holland & Knight LLP, 2011-2013
Erin Reedy, Manager of Authorizer Development
<ul style="list-style-type: none">• Paralegal Specialist, United States Department of Justice in Washington, D.C., 2008-2011
Katie Piehl, Director of Authorizer Development
<ul style="list-style-type: none">• Director of Charter School Authorizing Program, Volunteers of America-Minnesota, 2008-2011<ul style="list-style-type: none">◦ Developed and implemented organization strategic plan that led to significant education performance improvements for the charter portfolio.• Senior Program Evaluation Specialist, Minnesota Office of the Legislative Auditor, 2006-2008

RTI International:

Other Approved Levers: *Lever 1: Establish, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

RTI is an independent, nonprofit institute that provides research, development, and technical services to government and commercial clients worldwide. Our mission is to improve the human condition by turning knowledge into practice.

Relevant Experience

Winston Salem-Forsyth County Schools, Inquiry-based Learning Project
<ul style="list-style-type: none">• Co-designed the implementation strategy to align with strategic goals
New Hanover County Schools, New CTE High School Project
<ul style="list-style-type: none">• Established new policies to support the complex partnerships and offer support for differentiated student options
University of North Carolina System, Lab Schools Initiative
<ul style="list-style-type: none">• Provided technical assistance to connect teachers-in-training with live residency opportunities in classrooms.

Key Staff

Dr. Angela Quick, Senior Education Consultant
<ul style="list-style-type: none">• Senior Vice President/Interim CEO, NC New Schools, 2013-2016<ul style="list-style-type: none">◦ Created, implemented, and monitored a 20-million-dollar i3 federal grant• Deputy Chief Academic Officer & Academic Services and Instructional Support, North Carolina Department of Public Instruction, 2008-2013<ul style="list-style-type: none">◦ Facilitated all curricular and assessment programming
Edna Wallace, Senior Education Consultant
<ul style="list-style-type: none">• Senior Director of Policy and Partnerships, NC New Schools, 2012-2016• Special Assistant to the Vice Chancellor for the University Relations, UNC Charlotte, 2008-2012
Dr. Katherine McKnight, Senior Education Consultant
<ul style="list-style-type: none">• Director of Center for Educator Learning and Effectiveness, Pearson Education, 2013-2016• Director of Research and Evaluation, School Achievement, Pearson Education, 2006-2013
Dr. Laurie Baker, Senior Education Consultant
<ul style="list-style-type: none">• Senior Director of Client Services, NC New Schools/Breakthrough Learning, 2015-2016<ul style="list-style-type: none">◦ Managed national expansion activities and programmatic oversight for a \$20M grant.• Director of School Services, North Carolina New Schools, 2013-2015<ul style="list-style-type: none">◦ Led national expansion to develop the capacity of schools and districts to create opportunities for traditionally underrepresented students to graduate

School Empowerment Network (SEN):

School Empowerment Network (SEN) is a nonprofit organization dedicated to helping underserved students gain access to top quality education by developing leadership teams and creating school reset opportunities.

Relevant Experience

Summary

- SEN coaches are personally experienced with the work of developing and expanding great schooling options, having helped to found individual schools in NYC and having helped to lead the New Schools Team at the district level.
- SEN coaches are intimately familiar with the challenges of realizing a new school vision and creating a supportive and academically-focused environment in the place of an often-entrenched culture of low expectations.
- Based on its experience in the NYC Office of New Schools, SEN focuses its work on recruiting and developing cohorts of future leaders best suited for the entrepreneurial work of creating new schools.

Key Staff

Alex Shub, Founder & Chief Executive Officer

- **CEO and Founder of School Empowerment Network.** SEN aims to bring the successful practices developed in New York to other districts around the country. SEN has recently completed its first district partnership with Detroit's Education Achievement Authority which, in just a few short years and in a very challenging political environment, has seen dramatic improvements in its new schools, similar to those experienced in NYC.
- **Executive Director of NYC Office of New Schools (ONS).** Under his leadership, the ONS team interviewed over 1000 candidates and opened 120 new schools, which, overall, dramatically outperformed the schools they replaced.
- **Founding Principal of Essex Street Academy.** Turned a 35% graduation rate at original struggling school into a 93% graduation rate in the new school.

Carolyn Yaffe, Executive Director

- **Executive Director at School Empowerment Network (SEN).** Leads design and facilitation of learning experiences for Principals, Small Learning Community Leaders, and Master/Lead teachers.
- **Executive Director for School Quality at NYC Department of Education (NYCDOE).** Oversaw all aspects of School Quality Reviews including policy, implementation, professional development, internal/external communications and staffing.
- **Founding Principal of the Academy for Young Writers.** During her tenure, the school's graduation rate and college acceptance rate were above 90%.

LEVER 3: HELP FAMILIES UNDERSTAND AND NAVIGATE THEIR SCHOOL AND PROGRAM CHOICES

Brian Eschbacher:

Other Approved Lever: Lever 1: Establish

Relevant Experience

Denver Public Schools

- Oversaw the operational, system, and analysis teams that supported choice activities in the city.
- Established policies that govern the round 1 assignment process as well as the year-round enrollment processes to place students at schools.
- Designed and gained community and board approval of new enrollment zones that gave priorities to students based on their geographic residence.
- Structured analysis with independent organizations to ensure accountability of the matching tool results.
- Led the operations of two regional offices and system teams to operate the back-end algorithms.
- Collaborated with charter school leaders to ensure their participation in the system and increased equitable enrollment opportunities for students to attend charter schools.

Cross & Joftus:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

A system of great schools requires school and district leaders to effectively communicate with parents and families about what their children are learning and how they can help support that learning, giving families confidence that their children are safe and engaged while at school. Families and the system of great schools need to develop a common understanding of what a high quality school is and does. Through Jean-Claude Brizard's guidance an environment was created where families were empowered and engaged in their child's education in Rochester and Chicago schools. The Office of Family and Community Engagement (FACE) – the first of its kind in Chicago schools - was launched during the 2011-2012 school year to connect families and community members with schools and enlist them as partners in our work to improve schools and accelerate student learning.

Relevant Experience

Represented by Jean-Claude Brizard, Partner & Vice President

- Chief Executive Officer of Chicago Public Schools, 2011-2012
- Superintendent of Schools for Rochester, NY School District, 2008-2011
- Regional Superintendent, NYC Department of Education, 2006-2007
- Executive Director of Secondary Schools, NYC Department of Education, 2005-2006

EdPlex:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

EdPlex provides strategic consulting to schools, districts, and educational organizations with a focus on supporting rapid school improvement and district transformation.

Relevant Experience

EdPlex brings together two leaders in the field of developing school choice systems and process that are parent-centered and easily navigable.

Key Staff

Marissa Ferrari, Consultant

Director of Marketing, Denver Public Schools, 2009-2014

- Launched Denver's unified enrollment system -- developed the district's comprehensive internal and external communications strategy, and all multi-lingual "school chooser tools" -- print guide, school finder website, animated video, school fairs, etc.
- Helping families understand and navigate their school and program choices
- Developed and implemented district-wide, regional, and school-specific communications aimed at helping families assess school performance, programs, culture, and other indicators of quality.
- Developed the organizational structure to support this work: creating, hiring, and managing a team of regionally-based marketing specialists who focused on a cohort of schools as well as contributed to regional and district-wide strategies.

Shannon Fitzgerald, Consultant

Program Manager (Contractor), Enroll West Contra Costa, March 2017 - present

- Working with 13 charter schools to implement a unified charter enrollment system for the 2018/19 school year.
- Developing outreach and engagement strategy which will be executed upon in Fall/Winter 2017.

Program Manager (Contractor), Enroll Oakland Charters, 2014-2017

- Facilitated cross-sector collaboration between 40 charter schools, Oakland Unified School District (OUSD), and Alameda County of Education (ACOE) to develop and launch printed Options Guide and online School Finder: (<https://oaklandfinder.schoolmint.net/school-chooser>).
- Developed targeted outreach strategy to reach low-income families with students in transition grades.
- Implemented unified charter enrollment system (<https://enrolloak.org>).

Executive Director of Choice and Enrollment Services, Denver Public Schools, 2008-2013

- Supported development of tools and processes that allowed all families to gain exposure to and better understand the public educational options available to their student.

Fun da Mentals for Education:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop*

Our mission is to change the face of urban education and their communities by responding to the needs of the learner, the teachers, the parents, schools, and their communities.

Relevant Experience

Key Experiences

- Collaborated and participated in Math and Science Family Night at several campuses.
- Designed sever parent letters and surveys for our campuses.
- Designed and implemented a Student Success Conference at a K-8 Middle School to help parents and students understand their student's individual academic needs.
- Created a survey that would help with data regarding parent and community views on the school's instructional program, extra-curricular activities, school climate, teachers and support staff.

Key Staff

Dr. Malika Martin, Owner/Operator/Consultant

- Adjunct Professor, Houston Community College, 2010-Present
- Educational Consultant, Fundamentals for Education, LLC, 2013-Present
- Educational Consultant, Bradford Solutions, LLC, 2004-2013
- Mathematics & Science School Improvement Specialist, Spring Branch ISD, 2005-2008

Terrian Shackelford, Co-Owner, Consultant

- Adjunct Instructor, LeNotre Culinary Institute, 2014-Present
- Educational Consultant, Fundamentals for Education, LLC, 2013-Present
- Consultant & Tutor, Bradford Solutions, LLC, 2004-2013
- Teacher, Houston ISD, 1995-2004

Elaine Lewis, Consultant

- Educational Consultant, Fundamentals for Education, LLC, 2014-Present
- High School Principal, Houston ISD, 2009-2014
- Dean of Instruction, Houston ISD, 1998-2009

Mark Spillman, Consultant

- Educational Consultant, Fundamentals for Education, LLC, 2014-Present
- Adjunct Instructor, University of Houston Downtown, 2013-Present
- Instructional Coach, Houston ISD, 2015-2017
- Dean of Instruction, Woodson K8, 2013-2015

Kitamba, Incorporated:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 5: Reimagine, Lever 6: Align*

From our early days providing strategic counsel to reform-minded educational and philanthropic organizations, Kitamba has grown into a full-service firm offering strategic consulting and implementation support, product development, and investment and advisory services. We've delivered lasting impact to dozens of school districts, education technology companies, and foundations in the US and abroad. Our expertise in charter schools, data innovation, and strategic finance make us the go-to firm for organizations seeking smart, hands-on support.

Relevant Experience

Key Experiences

- Led universal enrollment system design and development and sustainability planning.
- Re-designing the technical enrollment systems while simultaneously developing support and structures necessary to engage and support families in accessing and maximizing the new process.
- Created a common application and timeline to ease the burden of school enrollment for families.

Key Staff

Rajeev Bajaj, CEO & Partner

- Led universal enrollment system design and development and sustainability planning.
- Led the re-design of the technical enrollment systems while simultaneously developing support and structures necessary to engage and support families in accessing and maximizing the new process.
- Created a common application and timeline to ease the burden of school enrollment for families.

Erin McGoldrick Brewster, COO & Partner

- Led universal enrollment system design and development and sustainability planning.
- Led the re-design of the technical enrollment systems while simultaneously developing support and structures necessary to engage and support families in accessing and maximizing the new process.

Collin Moore, Chief of Staff & Senior Project Manager

- Managed and supported universal enrollment system design and development and sustainability planning.
- Managed and supported the re-design of the technical enrollment systems while simultaneously developing support and structures necessary to engage and support families in accessing and maximizing the new process.
- Managed the creation of a common application and timeline to ease the burden of school enrollment for families.

RTI International:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 4: Build, Lever 5: Reimagine, Lever 6: Align*

RTI is an independent, nonprofit institute that provides research, development, and technical services to government and commercial clients worldwide. Our mission is to improve the human condition by turning knowledge into practice.

Relevant Experience

New Hanover County School District, New CTE High School Project
<ul style="list-style-type: none">Helped the community to understand available schooling options, collected and analyzed community data, and designed tactics to share messaging in virtual and live settings.
NCLDC
<ul style="list-style-type: none">Translated complex information into simple and compelling summaries and connected similar districts to share successful strategies.Helped district leaders align education options with parent demandCo-designed communications, policy briefs, and other community-facing materials

Key Staff

Edna Wallace, Senior Education Consultant
<ul style="list-style-type: none">Senior Director of Policy and Partnerships, NC New Schools, 2012-2016Special Assistant to the Vice Chancellor for the University Relations, UNC Charlotte, 2008-2012
Dr. Kaleen Healey, Senior Education Consultant
<ul style="list-style-type: none">Research Scientist, University of Chicago Consortium on School Research, 2012-2016<ul style="list-style-type: none">Designed and implemented mixed-method studies

Tembo, Inc:

Other Approved Lever: Lever 2: Develop

Our mission is to help education agencies better define, communicate, and drive school quality and educational equity. As a team, we are deeply committed to making education data clear, accessible, and actionable. Whether building interactive web tools for the public or developing data modelling tools for administrators, our team helps organizations leverage data to make more informed decisions.

Relevant Experience

Key Experiences

- **Configurable software to support parents in school search.** Based on extensive research with parents and families, as well as direct feedback from our own clients, Tembo has created an online application that allows LEAs to easily configure an interactive, friendly school finder for the families that they serve.
 - **School Finder.** Families start with an interactive school finder. The finder has a school results list, a map that visualizes schools and distance to home, and a series of filters that allows families to indicate their must-haves and nice-to-haves. The filters are completely configurable to the data you have available.
 - **School Profiles.** Every school in the system also has a detailed profile. We will work with you to configure engaging profiles with your data - everything from school mission statements, to school photos, to highlight stories, to videos, to performance data in charts, to easy-to-skim lists for programs, offerings, admissions criteria, etc.
 - **Additional features** include: support for multiple languages, “favoriting” schools for easy access, integration with Google Maps for transit times and distance, and the inclusion of school boundaries and transportation zones.
- **Extensive experience supporting states and LEAs in this area.** Tembo has created a ‘playbook’ engagement structure to walk LEAs through the key steps in creating these tools, which include: defining goals and requirements, mapping available data, organizing the best content structure, creating data file formats, advising on parent-friendly language, and configuring key features. Most recently, we have guided the following education agencies through this process: El Paso Independent School District, Louisiana DOE, New Mexico DOE, TN DOE, Enroll Indy (Indianapolis public and charter schools), and MySchoolDC.

Key Staff

David Stewart, CEO & Founder

- Founder & CEO, Tembo, Inc., 2010-2017
 - Built the company from a one-person consultancy to an organization that currently employs 15 in three different states
 - Successfully implemented more than 50 projects in more than 10 different states
- Executive Director, Evaluation and Performance Reporting & Director of Analytics, New York City Department of Education, 2007-2009
 - Managed the development and implementation of the School Progress Reports, Learning Environment Surveys, and School Quality Reviews
 - Defined methodology and business rules to evaluate school performance
 - Provided analytic support to Chancellor and Chief Accountability Officer
- Vice president of Product Development and Research, The Grow Network/McGraw-Hill, 2005-2007
 - Led all phases of product development process including discovery, business case development, field-testing, and development of functional requirements
 - Managed design, product development, research, and psychometric teams

- Provided product and project management support to key clients in New Mexico, New York City, Chicago, and Qatar
- Associate Vice President, Princeton Review, 1993-2005
 - Opened Princeton Review's first office in Canada in Toronto in 1996
 - Managed Princeton Review's largest school district clients within its K-12 practice in Los Angeles, Fairfax, and Philadelphia
 - Provided analytic support and training to Princeton Review's K-12 interim assessment team
 - Authored Cracking the Regents Spanish Exam and revised and edited Cracking the AP Spanish Exam

Michael Moore, Chief Operating Officer

- Chief Operating Officer, Director of Product Design, Tembo, Inc., 2012-2017
 - Oversaw development of BUILD from first prototypes through to final v1.0 live on the web
 - Supported accountability model design and production for multiple clients, including Baltimore City Public Schools and the School District of Philadelphia, conducting stakeholder engagement, metric development, metric calculation, report design, and report production.
- Research Assistant, Center for Policy Research in Education, 2011-2012
 - Developed online data collection tools, conducted interviews and analyzed participant data
- Editor-in-Chief, Perspectives on Urban Education, 2010-2012
 - Doubled submission rate and improved readership by 50%

Sabrina Yusuf, Engagement Leader

- Engagement Leader, Tembo, Inc., 2015-2017
 - Led the development of a school accountability framework for Indianapolis Public Schools to support portfolio planning and decision-making
 - Led the development of a school accountability framework for the Office of the State Superintendent of Education (OSSE) in Washington, D.C. for submission as part of the state's ESSA plan
 - Led the development and implementation of a School Finder and School Profiles in Indianapolis to support school choice and the launch of a universal enrollment system
- Strategic Data Fellow, Harvard University, Center for Education Policy Research, 2013-2015
 - Acted as a resource for agencies developing and implementing performance management tools
- Manager of Office of Strategic Analytics, School District of Philadelphia, 2011-2015
 - Led the development and implementation of the School Progress Report (SPR), a unified accountability tool designed to assess the quality of educational programming in Philadelphia's traditional and charter public schools

LEVER 4: BUILD AN ECOSYSTEM OF EFFECTIVE SCHOOL SUPPORT AND TALENT PROVIDERS

Cross & Joftus:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 5: Reimagine, Lever 6: Align*

C&J's supports district staff on how to organize and reorganize their resources (people, time and money) and capacity building for community agencies to ensure the provision of quality services and readiness to engage in deep partnerships with districts. Mr. Brizard along with C&J associates have sat in school and district leadership seats—they know what it takes to create deep and lasting changes, and are committed to supporting others in their efforts to do the same.

Relevant Experience

Represented by Jean-Claude Brizard, Partner & Vice President

- Chief Executive Officer of Chicago Public Schools, 2011-2012
- Superintendent of Schools for Rochester, NY School District, 2008-2011
- Regional Superintendent, NYC Department of Education, 2006-2007
- Executive Director of Secondary Schools, NYC Department of Education, 2005-2006

EdPlex:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 5: Reimagine, Lever 6: Align*

EdPlex provides strategic consulting to schools, districts, and educational organizations with a focus on supporting rapid school improvement and district transformation.

Relevant Experience

EdPlex has the ability to support districts in the development of their talent pipeline, through both internal efforts and partnerships with local or national organizations.

Key Staff

Connie Casson, Consultant
<ul style="list-style-type: none">• Adviser to Oakland Unified School District for School Performance Framework, 2014-2017• Consultant to Madison (WI) Metropolitan School District to redesign teacher talent strategy, 2015-16• Executive Director of Accountability, Research, and Evaluation for Denver Public Schools, 2010-2013• Deputy Strategy Officer for Denver Public Schools, 2007-2010
Rebecca Grant Zarret, Consultant
<p>Director of School Turnaround & School Improvement Initiatives, Denver Public Schools, 2009-2015</p> <ul style="list-style-type: none">○ Managed multiple school support partnerships to support turnaround efforts, including: The National Center on Time and Learning, Metro Center for Urban Education, The Center on Data Driven Research in Education, Blueprint Schools Network, SchoolWorks, Cambridge Education, and City Year.○ Hired and managed a team of independent strategy consultants that helped individual schools craft a school strategic plan, using a template her office developed that meshed with the state's required improvement plan documentation.○ Helped support the establishment of a math tutoring program in a set of Denver turnaround schools by directing federal funds to make such a program financially viable.

Empower Schools:

Other Approved Lever: Lever 2: Develop, Lever 5: Reimagine

Empower Schools partners with communities to help them get the schools they want with the results students need. We believe schools and communities thrive when educators are empowered and held accountable for making the key decisions at the school level that are best for students. We have developed Empowerment Zones as structures that create and sustain the conditions enabling empowered schools. Zones are clusters of autonomous schools within a district that are supported by a non-profit that builds the capacity of school leaders, brokers technical assistance, and ensure strong results via a performance management framework. Empowerment Zones are part of a national Third Way movement that leverages and fuses the best of districts and charters to help students, especially disadvantaged ones, succeed.

Relevant Experience

Springfield Empowerment Zone Partnership (SEZP) - Springfield, Massachusetts

- Within the Springfield Empowerment Zone, Empower built an ecosystem of effective educational and talent support by attracting top-tier external partners and boosting internal capacity to ensure that schools had access to proven and promising tools and partners.
- Empower built external partnerships with:
 - [TNTP](#), [The Achievement Network](#), and the [Teaching and Learning Alliance](#) to provide coherent and comprehensive school coaching
 - [Generation Teach](#), [Relay Graduate School of Education](#), and [Teach Western Mass](#) to develop talent pipelines
 - [UnboundEd](#), [Better Lesson](#), and [Student Achievement Partners](#) to design customized professional development
 - [New Classrooms](#) and [UP Education Network](#) to introduce new school designs and successful school operator models to Springfield
- Empower helped SEZP build a structure of school support for its schools. An independent evaluator provides ongoing feedback to principals. In addition, SEZP's Director of School Improvement and Student Success convenes a professional learning community of principals, leads quarterly data analysis meetings with each individual schools, and coordinates the external partnerships discussed above.
- Talent work in SEZP, spearheaded by an Empower employee who worked intensively with SEZP leaders and district officials, has led schools to hire candidates significantly earlier and has effectively eliminated the practice of schools opening the school year without being fully staffed. To support these outcomes Empower:
 - Supported the district in adopting a web-based applicant tracking process - helping to streamline the hiring process district-wide
 - Developed partnerships with local colleges and universities as well as with organizations including Teach for America, TNTP, Relay Graduate School of Education, and Achievement First to support the recruitment and training of high-quality educators
 - Helped to launch an independent non-profit called Teach Western Mass that is supporting talent efforts in the area around Springfield by improving the ability of schools to recruit top-quality teachers. Teach Western Mass has also launched two teacher pipeline programs to help ensure a supply of high-quality educators over the long term
- Empower recruited three high-potential leaders and provided intensive supports as they launched new schools within SEZP.

Key Staff

Brett Alessi, Co-Founder & Managing Director

- Co-Founder & Managing Director, Empower Schools (2014-Present)
 - Leads Empower's work in Colorado
- Managing Director of New Initiatives, Massachusetts 2020 Foundation (2012-2013)
 - Partnered with Lawrence Public Schools Receiver and Massachusetts Department of Elementary and Secondary Education to craft district-wide turnaround strategy based on the portfolio model of high autonomy and high accountability schools, resulting in a 40 percentage point increase in the share of Lawrence Public Schools attending Level 1 and Level 2 schools.
- Executive Director of Greater Boston and New England, Education Pioneers (2008-2012)
- Began his career as a classroom teacher before helping to start a think tank focused on youth civic engagement in Washington DC.

Chris Gabrieli, Co-Founder, CEO

- Co-Founder and CEO, Empower School (2014-Present)
 - Leads Empower's work in Massachusetts and Tennessee
- Co-Founder and Chairman, Transforming Education (2011-Present)
- Lecturer, Harvard Graduate School of Education (2009-Present)
- Chairman, Massachusetts Board of Higher Education & Springfield Empowerment Zone (2015-Present)
- Chairman, National Center on Time & Learning/Massachusetts 2020 (2000-2015)

Joe Rull, Senior Director

- Senior Director/Technical Assistance Coach, National Center on Time and Learning (2008-2016)
 - Coached schools in MA and across the country on effective practices for both planning and implementation of expanded learning time
- School Change Coach, Center on Secondary School Redesign (2007-2009)
 - Provided on site coaching for high schools
- Superintendent of Schools, Weymouth Public Schools (2004-2007)

Matt Matera, Program Director

- Program Director, Empower Schools (2014-Present)
 - Helped create and manage the Springfield Empowerment Zone Partnership and led the design, launch, and initial operation of the Zone
- Director of Innovation and Talent, Lawrence Public Schools (2013-2014)
- Director of Human Capital Investments, New Schools for New Orleans (2011-2013)
- Language Arts Teacher, Murdoch Middle School at Innovation Academy Charter School (2005-2008)

Alyssa Schechter, Manager of Strategic Growth

- Manager of Strategic Growth, Empower Schools (2016-Present)
 - Supports Empower's work with potential new partners in Massachusetts and Tennessee
- Analyst, Education Pioneers (2013 & 2015)
- Senior Associate Consultant, Bain & Company (2010-2014)

Sarah Robb, Senior Program Manager

- Senior Program Manager, Empower Schools (2015-Present)
 - Provided direct programmatic and implementation support to the Springfield Empowerment Zone Partnership
- Analyst, TNTP (2014-2015)

- Program Manager, City Year San Jose/Silicon Valley (2011-2013)
- Biology Teacher, Dusable Leadership Academy (2009-2011)

RTI International:

Other Approved Levers: *Lever 1: Establish Lever 2: Develop, Lever 3: Help, Lever 5: Reimagine, Lever 6: Align*

RTI is an independent, nonprofit institute that provides research, development, and technical services to government and commercial clients worldwide. Our mission is to improve the human condition by turning knowledge into practice.

Relevant Experience

Charlotte-Mecklenburg Schools, District CTE Alignment Project
<ul style="list-style-type: none">• Collaborated to train a cohort of more than 20 district-based instructional coaches and open a new career academy high school.• Provided school-based planning and principal leadership development.
CCRESA, LATP Program
<ul style="list-style-type: none">• Co-designed the program with a district that has a track record with lateral-entry teachers.
Peer Learning Network
<ul style="list-style-type: none">• Convenes the partners, curates session presentations, facilitates communication, and provides access to practical research.

Key Staff

Frank McKay, Education Consultant/Coach
<ul style="list-style-type: none">• Director of School Services, NC New Schools, 2013-2016• Teacher, Exploris Middle School, 2002-2013
Dr. Laurie Baker, Senior Education Consultant
<ul style="list-style-type: none">• Senior Director of Client Services, NC New Schools/Breakthrough Learning, 2015-2016<ul style="list-style-type: none">◦ Managed national expansion activities and programmatic oversight for a \$20M grant.• Director of School Services, North Carolina New Schools, 2013-2015<ul style="list-style-type: none">◦ Led national expansion to develop the capacity of schools and districts to create opportunities for traditionally underrepresented students to graduate
Dr. Robin Wisniewski, Senior Education Consultant
<ul style="list-style-type: none">• Director of Research and Consulting, McREL International, 2012-2015• Director, University of Arizona, 2011-2012• Director (Founding), Baldwin-Wallace University Berea, 2005-2011

Taca Consulting:

Other Approved Levers: Lever 1: Establish, Lever 5: Reimagine

Relevant Experience

Key Experiences

- Created and implemented competency-based selection models for teacher-level and central-office positions
- Developed and executed a competency-based principal selection process inclusive of the community, senior leadership, and school staff
- Consulted senior district leadership in the re-organization of human capital and human resources functions
- Re-organized central office in four school districts in service of school-based autonomy and differentiated supports
- Developed an alternate re-staffing process for transformation and turnaround schools to ensure mutual consent despite CBA regulations
- Advised senior district leadership on the development of a CBA that allowed for mutual consent, early hiring, and pay for performance
- Executed an alternative teaching and certification program
- Significant expertise and knowledge of alternative certification programs and requirements

Key Staff

Christopher Maher, Consultant

- Superintendent of Providence Public School District
- Mass Insight Education

Ami Magunia, Consultant

- Engagement Director, Mass Insight Education, 2012-2015
 - Changed Indiana state policy to reflect the inclusion of the internal lead partner model as a school improvement model.
 - Designed and launched a knowledge management platform
- Manager of School-Based Staffing and Recruitment, Baltimore City Public Schools, 2010=2011
 - Doubled number of applicants for teacher-level positions by implementing new recruitment strategies
 - Developed a rigorous, competency-based selection process for all teacher-level staff
- Special Assistant to the Chief Human Capital Officer, Baltimore City Public Schools, 2010
 - Created and implemented the operational implementation of a competency-driven assessment process for school leadership
 - Implemented key recruitment and selection strategies to ensure 31 school leadership vacancies were addressed
 - Developed internal process to implement ground-breaking teacher contract that aligned performance with compensation

LEVER 5: REIMAGINE CENTRAL SERVICE OFFERINGS TO SUPPORT SCHOOL BASED DECISION MAKING

Afton Partners:

Afton Partners supports America's public education organizations by advising on and implementing financial strategies that sustain effective educational programs.

Relevant Experience

Overview

Our services create an alignment between academic priorities and finance. Our primary service areas include:

- [Sustainability Planning](#). Afton provides financial expertise to ensure your resources are allocated in alignment with strategic priorities that are financially viable in the long-term.
- [Funding Equity and Fiscal Transparency](#). Afton provides advisory and analytical services that improve the potential for fiscal equity and transparency within state and local public education funding structures.
- [Operational Efficiency and Effectiveness](#). Afton provides management advisory services and supporting data analysis to drive operational efficiency and effectiveness within school operators.

Key Staff

Carrie Stewart, Co-Founder and CEO

- **Chicago Public Schools / Michael & Susan Dell Foundation (Chicago, IL)**
 - Co-led team to implement student based budgeting (SBB) in the nation's third largest public school district, reallocating \$2.6 billion of the district's operating budget on a student-need basis
- **North Chicago CUSD 187 (North Chicago, IL)**
 - Provided project oversight for the district as it expanded school choice, closed a school, implemented a student based budgeting formula for its charter schools, and re-aligned district-run school grade configurations.
- **Other Representative Clients** include School District of Philadelphia, Bill & Melinda Gates Foundation, Orleans Parish School Board, District of Columbia Public Schools, State of Tennessee Department of Education, Aspire Public Schools

Scott Milam, Co-Founder and Managing Director

- [Raise Your Hand Texas, Raising Blended Learners](#): Financial technical advisor supporting 20 demonstration and pilot network sites implementing innovative, blended learning models throughout the State.
- **Tennessee Public School Collaborative**: Afton Partners worked in collaboration with the [Metro Nashville Public Schools](#) (MNPS) and the [Tennessee Charter School Center](#) (TCSC) to develop an analysis for the Public Schools Collaborative (PSC) on per pupil spending at district-run and charter schools. The summary report can be found [here](#).
- **Other Representative Clients** include KLE Foundation (Austin, TX), District of Columbia Public Schools, Next Generation Learning Challenges, the Massachusetts Port Authority

Katie Morrison-Reed, Director

- **Chief of Staff, Portfolio/Innovation Office & Director of Transition Operations, Chicago Public Schools**
 - Led policy development for District's conversion to Student-Based Budgeting.
 - Served as a key advisor and led implementation of portfolio processes including new school authorization and incubation, charter/contract school accountability, and enrollment functions.
 - Led project management of 2013-14 school actions transitions (closures, co-locations, turnarounds)
 - Developed District's Ten-Year Facility Master Plan

Caerus Management:

Caerus provides advisory services to clients in education, government, and the private sector. Areas of expertise include financial management, data analysis, organizational structure, system design, strategy development, and project management. Caerus advisors have significant experience in the education sector and share a common belief that all families should have access to multiple free, excellent schools for their children.

Relevant Experience

Newark Public Schools (NPS), 2015-2017

- Developed 3-year Strategic Plan for Department of Special Education, serving 5,800 students with disabilities
- Assisted the district in growing Extraordinary Aid funding by 96%, or roughly \$1.2M in 2017
- Saved the district over \$1.2M in paraprofessional aide costs by designing and implementing oversight systems.
- Developed the CST Hub Strategy to reduce the allocation of restrictive-services and provide CSTs more capacity to work with students in areas of expertise.
- Implemented CST Performance Scorecards to increase CST compliance.
- Developed systems and tools to increase OSE oversight of the OOD placement process and optimize the placement decision making process.

School District of Philadelphia (SDP), 2016

- Supported the development of the newly formed Autonomy Network, consisting of 25 in-district schools, by researching autonomy-related efforts undertaken in 5 urban school districts and conducting surveys and interviews with SDP school leaders.
- Provided district leadership with policy recommendations regarding school evaluation, communication, budgeting, staffing, and accountability standards.

Key Staff

Adrian Mendez, Principal

- Principal and New Initiatives Director, Caerus Management
 - Lead advisor for client engagements within education sector
 - Areas of focus include strategy design, execution, project management and leadership coaching
- Strategy Director, Louisiana Association of Public Charter Schools
 - Led the restructure of internal organization to improve fundraising program, doubled the operating budget, and grew internal staff from 3 to 10.
 - Designed and implemented statewide program to create and train high quality school boards
 - Led the execution of the 3-year Strategic Plan to support 90 charter schools serving 38,000 students.
- School Operations Director, New Schools for New Orleans
 - Oversaw finance and operations-related start-up activities for 12 New Orleans charter schools and charter management organizations serving 7,000 students, or 20% of New Orleans public school students

Elliott Edwards, Advisor

- Caerus Advisor: Newark Public Schools Project
 - Developed data management systems to identify per-pupil costs for all students with disabilities across district
 - Developed data-driven evaluation system for principals to better assess CST staff
- Board Treasurer, Big Class
 - Board member of a growing nonprofit that offers creative writing and literacy-focused programming for youths
 - Led annual budget development activities
 - Developed financial management systems and reporting tools
- Education Pioneers Fellow: Algiers Charter School Association
 - Created and standardized operational procedures for a school district serving 1,400 students
 - Transformed how information was collected, stored, and disseminated throughout the school district
 - Authored two Operations Manuals; one for school administrators and one for teachers
- Plus One Kids (Seoul, South Korea): Elementary Teacher
- Childrens' Creative Learning Center (Seoul, South Korea): Elementary Teacher

Charlie Crosby, Advisor

- Caerus Advisor: Newark Public Schools Project
 - Authored Special Education Department 3-year Strategic Plan
 - Developed CST Hub Strategy to standardize IEP evaluation process, improve compliance, and provide more time for CSTs to focus on areas of expertise
 - Developed system to track paraprofessional aide utilization, saving the district millions in the short and long-term.
- Caerus Advisor: School District of Philadelphia
 - Conducted research and developed policy recommendations for SDP Autonomy Network
- Teach for America: Corps Member, Middle School Teacher
- Undergraduate Intern: Recovery School District
- Undergraduate Intern: Cowen Institute for Public Education Initiatives

Drew Mouton, Principal & Managing Director

- Founder or C-level manager of more than a dozen companies
- Diverse leadership experience in science & technology, financial services, software, telecommunications, real estate, manufacturing, and government.
- Experienced leader, project manager, tech entrepreneur and strategy consultant.
- Former CEO of a publicly traded company and significant experience serving in Board of Directors roles

Cross & Joftus:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 6: Align*

We believed that the school is the unit of execution. Therefore reform effort pivots on the school building leader. In the absence of a compelling reason to retain control centrally, school leaders, as the primary agents of change, should have freedom and flexibility over how best to use their resources (time, people and money) to create meaningful changes that directly impact students. Operating within a clear framework of standards for student success, highly effective school leaders use their resources to develop effective practices and innovative school designs, to best meet the needs of their students. Highly effective teachers reinforce high expectations for all students and are responsible for and supported to provide instruction that is standards-aligned, student-centered, engaging and data-informed.

Relevant Experience

Represented by Jean-Claude Brizard, Partner & Vice President

- Chief Executive Officer of Chicago Public Schools, 2011-2012
- Superintendent of Schools for Rochester, NY School District, 2008-2011
- Regional Superintendent, NYC Department of Education, 2006-2007
- Executive Director of Secondary Schools, NYC Department of Education, 2005-2006

Education Resource Strategies:

Other Approved Lever: Lever 2: Develop

Education Resource Strategies (ERS) is a non-profit organization dedicated to transforming how urban school systems organize resources—people, time, technology, and money—so that every school succeeds for every student.

Relevant Experience

Cleveland Metropolitan School District

- Helped district leadership team fully understand long-term financial risks and challenges associated with significant changes and investments that were proposed and helped implement a plan.
- Analyzed district data to build a transparent fact base around how resources are actually distributed and used across the district.
- Designed and implemented a new SBB funding system where dollars are allocated to schools based on their student enrollment and student needs.
- Supported the redesign of the district's Central Office to better support the district's new "portfolio model".

Key Staff

Karen Hawley Miles, President and Executive Director

- Independent Consultant 1993-2004,
 - Consulted and supported urban school districts and reform organizations in strategic resource use and allocation, instruction concerning resource use, leadership development, and curriculum development.
- Management Consultant, Boston Public Schools and Mayor's Office
 - Identified opportunities to reallocate over \$15 million towards educational priorities.

Stephen Frank, Co-Founder & Partner

- Strategy Consultant, Bain & Company, 2000-2002
- Partner, Education Resource Strategies, 2002 to Present
- Heads ERS research, methodology, and data analytics; and state practices.
- Has led strategy development projects in Texas (Aldine, El Paso, and Spring Branch) and across the country, including Los Angeles, Chicago, Washington D.C., Baltimore, Atlanta, Syracuse, Rochester, Buffalo, St. Paul; Prince George's County, MD, Tulsa and elsewhere.
- Has worked with state departments of Education in TN, Louisiana, NY and Georgia.

Courtney Hitchcock, Manager

- MBA Summer Intern, Technical Development Corporation, 2012
 - Designed and built a financial model for school used to project revenues and expenses in order to optimize student enrollment levels
 - Led a current state assessment for a midsized nonprofit in order to inform its five-year strategic plan
- Business Analyst, Public Consulting, 2008-2011
 - Managed the development of customized data management system utilized in over 25 school districts
 - Led implementation of largest education project in company history, a statewide management system

Taran Raghuram, Associate

- Coordinator, Sidney Frank Scholars Association, 2013-2014
 - Organized monthly events and talks for students with the highest demonstrated financial need
- Research Intern, Janaagraha, 2013
 - Co-created the CRBI index, a measure of public sector corruption in Indian cities using crowdsourced bribery data

EdPlex:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 6: Align*

EdPlex provides strategic consulting to schools, districts, and educational organizations with a focus on supporting rapid school improvement and district transformation.

Key Staff

Shannon Fitzgerald, Consultant

Executive Director of Choice and Enrollment Services, Denver Public Schools, 2008-2013

- Implemented and administered one of the nation's first unified enrollment systems, inclusive of all traditional neighborhood schools, charter schools, and magnet schools.
- Provided DPS leadership with comprehensive and comparative school supply/demand data for the first time, allowing for a more accurate understanding for purposes of strategic decision-making.

Director of Data Governance, Denver Public Schools, 2008-2009

- Conducted thorough analysis of district's data systems and associated processes, prioritizing areas of focus for improvement which enabled true data-driven decision-making.

Brenna Copeland, Founder & CEO

Consultant to Associate Chief of Academics in Denver Public Schools

- Working on project to support the head of curriculum and academics at DPS in a data-driven approach to offering support services to schools
- The purpose of the project is to be able to provide school principals with real data about whether or not central office supports contribute towards improved school-level outcomes, as these principals are asked to make decisions about which central office supports to purchase as part of their annual budgeting process

Executive Director of Portfolio Management, Denver Public Schools, 2011-2015

- Created a new menu of central services that innovation school could choose from, in collaboration with the DPS finance team
- Prepared bi-annual report to the DPS Board of Education on how schools were using site-based decision-making and autonomy to drive performance
- Directly supervised innovation school principals that were opening new schools in the district during their year zero and year one, to ensure that these schools received differentiated oversight aligned to their unique school-based autonomies

Rebecca Grant Zarret, Consultant

Director of School Turnaround & School Improvement Initiatives, Denver Public Schools, 2009-2015

- Worked with turnaround schools pursuing innovation status, a designation written into state law, that allows schools to waive implementation of some state and district policies if they determine these policies impeded progress toward meeting the goals of the schools' turnaround plan. Such autonomy is a requirement of schools receiving funding from the Title I School Improvement Grant (SIG), the grant program Rebecca managed

Special Assistant to the Superintendent, Austin ISD, 2009

Executive Intern to the Superintendent, Fort Worth ISD, 2008-2009

- Worked closely with schools undergoing a turnaround effort to examine, as a part of their planning process, what they really needed to be successful since their turnaround status created conditions that allowed for more autonomous, creative and tailored site-based decision-making (FWISD, AISD, DPS)

Connie Casson, Consultant

Adviser to Oakland Unified School District on School Performance Framework
Executive Director of Accountability, Research, and Evaluation for Denver Public Schools, 2010-2013
Deputy Strategy Officer for Denver Public Schools, 2007-2010

Empower Schools:

Other Approved Lever: *Lever 2: Develop, Lever 4: Build*

Empower Schools partners with communities to help them get the schools they want with the results students need. We believe schools and communities thrive when educators are empowered and held accountable for making the key decisions at the school level that are best for students. We have developed Empowerment Zones as structures that create and sustain the conditions enabling empowered schools. Zones are clusters of autonomous schools within a district that are supported by a non-profit that builds the capacity of school leaders, broker's technical assistance, and ensure strong results via a performance management framework. Empowerment Zones are part of a national Third Way movement that leverages and fuses the best of districts and charters to help students, especially disadvantaged ones, succeed.

Relevant Experience

Springfield Empowerment Zone Partnership (SEZP) - Springfield, Massachusetts

- Empower worked closely with the district to write the autonomy-enabling agreements governing SEZP schools. These agreements include:
 - **MOU:** A contract that sets forth clear roles and responsibilities for SEZP schools and shields them from having to follow the majority of district regulations and participate in district-wide programs and services that do not meet school needs..
 - **CBA:** A separate collective bargaining agreement with the teachers union that allows working conditions to be set at the school-level rather than being uniform across the entire district. (Although the context is different in Texas, informal negotiations with teachers will nevertheless be required as they become accustomed to the more flexible conditions in the zone. The Empower team is skilled in guiding these discussions to constructive conclusions.)
- Under these agreements SEZP schools have autonomy over:
 - **Budget:** School leaders have authority to allocate more than 80% of the total per-student funding generated by the school. SEZP and SPS keep a small amount for essential district services and SEZP operations. Schools may opt-in, on an a-la-carte basis, to many district services. These services are priced at cost (or close thereto) on a per-student basis. Empower partnered with the district in the development of this price list for services as well as the creation of the list of services.
 - **Staffing:** All hiring decisions are made at the school-level and schools have the flexibility to structure their staff as necessary to meet student needs.
 - **Curriculum:** School leaders make curriculum decisions. These decisions are memorialized in school operational plans and approved by the SEZP board.
 - **Schedule:** Schools have an extended day, the option for an extended school-year, and the flexibility to structure their daily and weekly schedules for student instruction and teacher collaboration/PD. SEZP coordinates with the district to help manage transportation costs.
 - **Culture:** Schools have the autonomy to craft an individualized, high-expectations plan for their school.

Luminary Learning Network (LLN) - Denver, Colorado

- Empower supported a similar re-imagining of the relationship between Denver's central office and the 4 schools in the Luminary Learning Network (LLN).
 - Schools have significant decision-making authority. The LLN framework that Empower worked to create explicitly redefines the relationship between the district offices and preserves the important academic and budget autonomies.

Key Staff

Brett Alessi, Co-Founder & Managing Director

- Co-Founder & Managing Director, Empower Schools (2014-Present)
 - Leads Empower's work in Colorado
- Managing Director of New Initiatives, Massachusetts 2020 Foundation (2012-2013)
 - Partnered with Lawrence Public Schools Receiver and Massachusetts Department of Elementary and Secondary Education to craft district-wide turnaround strategy based on the portfolio model of high autonomy and high accountability schools, resulting in a 40 percentage point increase in the share of Lawrence Public Schools attending Level 1 and Level 2 schools.
- Executive Director of Greater Boston and New England, Education Pioneers (2008-2012)
- Began his career as a classroom teacher before helping to start a think tank focused on youth civic engagement in Washington DC.

Chris Gabrieli, Co-Founder, CEO

- Co-Founder and CEO, Empower School (2014-Present)
 - Leads Empower's work in Massachusetts and Tennessee
- Co-Founder and Chairman, Transforming Education (2011-Present)
- Lecturer, Harvard Graduate School of Education (2009-Present)
- Chairman, Massachusetts Board of Higher Education & Springfield Empowerment Zone (2015-Present)
- Chairman, National Center on Time & Learning/Massachusetts 2020 (2000-2015)

Joe Rull, Senior Director

- Senior Director/Technical Assistance Coach, National Center on Time and Learning (2008-2016)
 - Coached schools in MA and across the country on effective practices for both planning and implementation of expanded learning time
- School Change Coach, Center on Secondary School Redesign (2007-2009)
 - Provided on site coaching for high schools
- Superintendent of Schools, Weymouth Public Schools (2004-2007)

Matt Matera, Program Director

- Program Director, Empower Schools (2014-Present)
 - Helped create and manage the Springfield Empowerment Zone Partnership and led the design, launch, and initial operation of the Zone
- Director of Innovation and Talent, Lawrence Public Schools (2013-2014)
- Director of Human Capital Investments, New Schools for New Orleans (2011-2013)
- Language Arts Teacher, Murdoch Middle School at Innovation Academy Charter School (2005-2008)

Alyssa Schechter, Manager of Strategic Growth

- Manager of Strategic Growth, Empower Schools (2016-Present)
 - Supports Empower's work with potential new partners in Massachusetts and Tennessee
- Analyst, Education Pioneers (2013 & 2015)
- Senior Associate Consultant, Bain & Company (2010-2014)

Sarah Robb, Senior Program Manager

- Senior Program Manager, Empower Schools (2015-Present)
 - Provided direct programmatic and implementation support to the Springfield Empowerment Zone Partnership
- Analyst, TNTP (2014-2015)
- Program Manager, City Year San Jose/Silicon Valley (2011-2013)
- Biology Teacher, Dusable Leadership Academy (2009-2011)

Kitamba, Incorporated:

Other Approved Levers: Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 6: Align

From our early days providing strategic counsel to reform-minded educational and philanthropic organizations, Kitamba has grown into a full-service firm offering strategic consulting and implementation support, product development, and investment and advisory services. We've delivered lasting impact to dozens of school districts, education technology companies, and foundations in the US and abroad. Our expertise in charter schools, data innovation, and strategic finance make us the go-to firm for organizations seeking smart, hands-on support.

Relevant Experience

Key Experiences

- Supported student weighted funding and school based budgeting
- Supported change management associated with moving from a fixed to a variable cost organization.
- Worked to define network structures, associated autonomies, analysis and development of a menu of services for schools.
- Led work from a variety of entry points including the annual budget cycle, as part of a broader system transformation, and as part of the development of a redesign school support structures and network affiliation for all schools in a district.
- Worked with districts to design and develop capacity for leaders in a more autonomous system of schools.
- Led the financial analysis, offering /RFP/ affiliation, and capacity building and change management components of re-envisioning central support school level autonomy and decision making.

Key Staff

Rajeev Bajaj, CEO & Partner

- Supported student weighted funding and school based budgeting
- Supported change management associated with moving from a fixed to a variable cost organization.
- Worked to define network structures, associated autonomies, analysis and development of a menu of services for schools.
- Led work from a variety of entry points including the annual budget cycle, as part of a broader system transformation, and as part of the development of a redesign school support structures and network affiliation for all schools in a district.
- Worked with districts to design and develop capacity for leaders in a more autonomous system of schools.
- Led the financial analysis, offering /RFP/ affiliation, and capacity building and change management components of re-envisioning central support school level autonomy and decision making.

Erin McGoldrick Brewster, COO & Partner

- Led data and accountability office in Washington D.C., developed accountability framework for D.C. schools, led evaluations and supported implementation of data driven culture including training, data analysis, and other data-related initiatives for all school stakeholders.
- Supported and project managed portfolio process and annual portfolio management cycle in large urban districts in the northeast.

Collin Moore, Chief of Staff & Senior Project Manager

- Supported student weighted funding and school based budgeting
- Supported change management associated with moving from a fixed to a variable cost organization.
- Worked to define network structures, associated autonomies, analysis and development of a menu of services for schools.
- Led work from a variety of entry points including the annual budget cycle, as part of a broader system transformation, and as part of the development of a redesign school support structures and network affiliation for all schools in a district.
- Worked with districts to design and develop capacity for leaders in a more autonomous system of schools

Mark Viehman, Director of New Ventures & Senior Project Manager

- Managed all aspects of budget cycle and strategic finance in Newark New Jersey including school based budgeting, staffing projections and analysis

RTI International:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 6: Align*

RTI is an independent, nonprofit institute that provides research, development, and technical services to government and commercial clients worldwide. Our mission is to improve the human condition by turning knowledge into practice.

Relevant Experience

Durham Public Schools, Multi-Tiered System of Support (MTSS) Project
<ul style="list-style-type: none">• Developed customized professional learning for districts leaders• Connected Multi-Tiered System of Support (MTSS) with current district initiatives• Created a plan for implementation in schools
Johnston County Schools, Project-Based Learning (PBL) Project
<ul style="list-style-type: none">• Help design and roll out multi-year initiative to embed PBL specialists in a selected cohort of pilot schools.• Supported in the implementation of a cohort-based model with limited participant numbers to maximize opportunities for direct support and growth.
Surry County (NC) Schools
<ul style="list-style-type: none">• Aligned central office priorities with school needs and adapting strategies to function across a diverse set of schools.

Key Staff

Dr. Angela Quick, Senior Education Consultant
<ul style="list-style-type: none">• Senior Vice President/Interim CEO, NC New Schools, 2013-2016<ul style="list-style-type: none">◦ Created, implemented, and monitored a 20-million-dollar i3 federal grant• Deputy Chief Academic Officer & Academic Services and Instructional Support, North Carolina Department of Public Instruction, 2008-2013<ul style="list-style-type: none">◦ Facilitated all curricular and assessment programming
Joe Edney, Senior Education Consultant
<ul style="list-style-type: none">• Senior Education Consultant, New Hanover CTE High School, 2016-present<ul style="list-style-type: none">◦ Supporting a large school system (UNC General Administration) in developing an “implementation guide” to help individual districts launch new programs and open schools.• Education Consultant, Knightdale High School of Collaborative Design, 2013- present<ul style="list-style-type: none">◦ Facilitated strategy sessions between school leaders and district leadership staff.◦ Planned and facilitated community engagement sessions◦ Conducted background research and analysis◦ Developed performance measures
Dr. Katherine McKnight, Senior Education Consultant
<ul style="list-style-type: none">• Director of Center for Educator Learning and Effectiveness, Pearson Education, 2013-2016• Director of Research and Evaluation, School Achievement, Pearson Education, 2006-2013

Taca Consulting:

Other Approved Levers: Lever 1: Establish, Lever 4: Build

Relevant Experience

Key Experiences

- Re-organized central office in four school districts to support school-based autonomy and differentiated central office support to schools
- Developed performance contracts for operators (both charter and non-charters) to define expectations for school performance and outline responsibilities for central office support
- Trained central office staff responsible for school management in school effectiveness frameworks and their use in providing differentiated services to schools
- Developed process to ascertain the needs of schools in order to differentiate central office support

Key Staff

Christopher Maher, Consultant

- Superintendent of Providence Public School District
- Mass Insight Education

Ami Magunia, Consultant

- Engagement Director, Mass Insight Education, 2012-2015
 - Changed Indiana state policy to reflect the inclusion of the internal lead partner model as a school improvement model.
 - Designed and launched a knowledge management platform
- Manager of School-Based Staffing and Recruitment, Baltimore City Public Schools, 2010=2011
 - Doubled number of applicants for teacher-level positions by implementing new recruitment strategies
 - Developed a rigorous, competency-based selection process for all teacher-level staff
- Special Assistant to the Chief Human Capital Officer, Baltimore City Public Schools, 2010
 - Created and implemented the operational implementation of a competency-driven assessment process for school leadership
 - Implemented key recruitment and selection strategies to ensure 31 school leadership vacancies were addressed
 - Developed internal process to implement ground-breaking teacher contract that aligned performance with compensation

LEVER 6: ALIGN CIVIC PARTNERS AND ENGAGE THE COMMUNITY

Cross & Joftus:

Other Approved Levers: Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine

The business and philanthropic community need to be integral to the design of reform strategies. Chicago's (under Brizard's tenure) uniform accountability committee, for example, included district and charter leadership, funders, community leaders and members of the board of education. In addition to a first-ever parent office, the Chicago school system maintained an active Faith liaison office. The leadership of the Chicago Public Schools, Chicago's charter management organizations, and the educational non-profit community shared a vision of providing every student with a quality education that prepares them for college and career, regardless of school type or provider. As formalized in the District-Charter Compact, charter and district leaders acknowledge a shared responsibility for student success. This Charter Compact identified critical commitments for the district and charters to work together to best serve Chicago's families and students: a fair and transparent funding system, clear systems of support for school operators (including facilities for charters), centralized enrollment and equitable student assignment, systemic ways of sharing effective practices across school operators, a multi-faceted talent strategy, and activities to engage parents and families.

Relevant Experience

Represented by Jean-Claude Brizard, Partner & Vice President
<ul style="list-style-type: none">• Chief Executive Officer of Chicago Public Schools, 2011-2012• Superintendent of Schools for Rochester, NY School District, 2008-2011• Regional Superintendent, NYC Department of Education, 2006-2007• Executive Director of Secondary Schools, NYC Department of Education, 2005-2006

EdPlex:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine*

EdPlex provides strategic consulting to schools, districts, and educational organizations with a focus on supporting rapid school improvement and district transformation.

Relevant Experience

The whole EdPlex team has experience working to support authentic community engagement, effective communications and collaboration across district and third-party organizations.

Key Staff

Brenna Copeland, Founder & CEO
<p>Founder & CEO, EdPlex - School Restart Work 2015-present</p> <ul style="list-style-type: none">Established first of its kind best practice guidance for districts around the country to facilitate thorough community engagement processes as part of their school intervention work (see www.schoolrestarts.org)Facilitated cohort-based learning sessions focused on authentic community engagement and citywide communication strategies for Oakland Unified School District, Nevada's Achievement School District and two authorizers in Minnesota (each city/region is supported by partner philanthropic organizations) <p>Executive Director of Portfolio Management, Denver Public Schools, 2011-2015</p> <ul style="list-style-type: none">Supported the Charter Compact work that brought together partner organizations, charter leaders and district leaders to define new policy and practice aligned to shared goals for student performance and equity of access for students
Marissa Ferrari, Consultant
<p>Director of Marketing, Denver Public Schools, 2009-2014</p> <ul style="list-style-type: none">Helping families understand and navigate their school and program choicesDeveloped and implemented district-wide, regional, and school-specific communications aimed at helping families assess school performance, programs, culture, and other indicators of quality.Developed the organizational structure to support this work: creating, hiring, and managing a team of regionally-based marketing specialists who focused on a cohort of schools as well as contributed to regional and district-wide strategies.
Rebecca Grant Zarret, Consultant
<p>Education Consultant, 2014-present</p> <ul style="list-style-type: none">Developed communications collateral to support school turnaround efforts and related processes (FWISD, AISD, Oakland Unified School District). <p>Director of School Turnaround & School Improvement Initiatives, Denver Public Schools, 2009-2015</p> <ul style="list-style-type: none">Served as primary point of contact in regard to the School Improvement Grant (SIG) and DPS's school turnaround work, including fielding inquiries, and developing materials and a website to communicate about Denver's school turnaround work (DPS) <p>Special Assistant to the Superintendent, Austin ISD, 2009</p> <p>Executive Intern to the Superintendent, Fort Worth ISD, 2008-2009</p>
Shannon Fitzgerald, Consultant

Program Manager (Contractor), Enroll Oakland Charters, 2014-2017

- Collaborated with Oakland Unified Public Schools (OUSD) to plan and execute on a 4-month intensive community engagement process, aimed at gathering input about plans to implement a unified enrollment system.
- Created and participated in execution of outreach strategy for Enroll Oakland Charters enrollment system.

Executive Director of Choice and Enrollment Services, Denver Public Schools, 2008-2013

- Engaged with local funders and community based organizations to identify and quantify equity-of-access challenges facing low income families in Denver.
- Planned and conducted multiple stakeholder engagement gatherings with parents, school staff, and community members from various Denver neighborhoods.
- Supported community outreach efforts as unified enrollment system was being introduced to the city (i.e., planned and facilitated community-based meetings).

Kitamba, Incorporated:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 5: Reimagine*

From our early days providing strategic counsel to reform-minded educational and philanthropic organizations, Kitamba has grown into a full-service firm offering strategic consulting and implementation support, product development, and investment and advisory services. We've delivered lasting impact to dozens of school districts, education technology companies, and foundations in the US and abroad. Our expertise in charter schools, data innovation, and strategic finance make us the go-to firm for organizations seeking smart, hands-on support.

Relevant Experience

Key Experiences

- Worked with partners and government agencies to build the political will and support.
- Created a sustained view of a campaign and conversation with community that ensures feedback can be incorporated into decision-making and authentic voice.

Key Staff

Rajeev Bajaj, CEO & Partner

- Worked with partners and government agencies to build the political will and support.
- Created a sustained view of a campaign and conversation with community that ensures feedback can be incorporated into decision-making and authentic voice.

Erin McGoldrick Brewster, COO & Partner

- Worked with partners and government agencies to build the political will and support.
- Created a sustained view of a campaign and conversation with community that ensures feedback can be incorporated into decision-making and authentic voice.

Collin Moore, Chief of Staff & Senior Project Manager

- Worked with partners and government agencies to build the political will and support.
- Created a sustained view of a campaign and conversation with community that ensures feedback can be incorporated into decision-making and authentic voice.

Mark Viehman, Director of New Ventures & Senior Project Manager

- Worked with partners and government agencies to build the political will and support.
- Created a sustained view of a campaign and conversation with community that ensures feedback can be incorporated into decision-making and authentic voice.

RTI International:

Other Approved Levers: *Lever 1: Establish, Lever 2: Develop, Lever 3: Help, Lever 4: Build, Lever 5: Reimagine*

RTI is an independent, nonprofit institute that provides research, development, and technical services to government and commercial clients worldwide. Our mission is to improve the human condition by turning knowledge into practice.

Relevant Experience

New Hanover County Schools, New CTE High School Project
<ul style="list-style-type: none">Designed the communications strategy for the school, including a process to build talking points based on community input.Helped to organize launch materials and activities.
Lab School Initiatives
<ul style="list-style-type: none">Conducting site-based support to help connect participating universities and districts with their communities and key stakeholders.Facilitated the engagement among partners, launched new initiatives, and developed new capacity for community outreach among district teams.
Business for Educational Success and Transformation in North Carolina (BEST NC)
<ul style="list-style-type: none">Supported the planning and rolling out an ambitious, statewide initiative.Designed and executed North Carolina's first Education Innovation Lab, which was attended by nearly 100 diverse education stakeholders and expertsCurrently lead a developmental evaluation to inform BEST NC on their progress toward their goals and to develop future metrics and evaluation protocols.

Key Staff

Edna Wallace, Senior Education Consultant
<ul style="list-style-type: none">Senior Director of Policy and Partnerships, NC New Schools, 2012-2016Special Assistant to the Vice Chancellor for the University Relations, UNC Charlotte, 2008-2012
Joe Edney, Senior Education Consultant
<ul style="list-style-type: none">Senior Education Consultant, New Hanover CTE High School, 2016-present<ul style="list-style-type: none">Supporting a large school system (UNC General Administration) in developing an "implementation guide" to help individual districts launch new programs and open schools.Education Consultant, Knightdale High School of Collaborative Design, 2013- present<ul style="list-style-type: none">Facilitated strategy sessions between school leaders and district leadership staff.Planned and facilitated community engagement sessionsConducted background research and analysisDeveloped performance measures
Dr. Robin Wisniewski, Senior Education Consultant
<ul style="list-style-type: none">Director of Research and Consulting, McREL International, 2012-2015Director, University of Arizona, 2011-2012Director (Founding), Baldwin-Wallace University Berea, 2005-2011