

# Technical Assistant Provider Profiles

## **Lever 1:** Establish and administer portfolio review and planning process

Bell Creek Consulting	Margo Roen
Eschbacher Consulting	McRel International
Cross & Joftus	N2 Learning, L C
EdPlex	RTI International
Fun Da Mentals for Education	Taca Consulting
Kitamba, Incorporated	Tembo, Inc

## **Lever 2:** Develop and expand great schooling options

Bellwether Education Partners	Kitamba, Incorporated
Cross & Joftus	Margo Roen
Education Resource Strategies	NACSA
EdPlex	RTI International
Empower Schools Inc.	School Empowerment Network
Fun Da Mentals for Education	

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

Bellwether Education Partners	Fun Da Mentals for Education
Eschbacher Consulting	Kitamba, Incorporated
Cross & Joftus	RTI International
EdPlex	Tembo, Inc

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

Bellwether Education Partners	N2 Learning, L C
Cross & Joftus	RTI International
EdPlex	Taca Consulting
Empower Schools Inc.	TNTP
McRel International	

## **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

Bellether Education Partners	Kitamba, Incorporated
Cross & Joftus	RTI International
EdPlex	TNTP

# LEVER 1: ESTABLISH AND ADMINISTER PORTFOLIO REVIEW AND PLANNING PROCESSES

## Bell Creek Consulting:

*Bell Creek is a boutique management consulting firm that serves mission-driven organizations including education institutions, government agencies, nonprofits, foundations, and social-purpose private enterprises. We support leaders driving change at pivotal moments for their organizations—helping our clients transform to achieve and sustain new levels of performance and effectiveness for the public good. Bell Creek’s team has worked extensively across the PreK to career continuum, including with public school districts, charter school networks, higher education systems, and workforce development centers. As a result, we are uniquely positioned to help “connect the dots” in support of student success.*

*Bell Creek Consulting approach to engagements is characterized by:*

- **A customized approach built for your unique context and goals**  
*Our work is anything but cookie cutter. While we draw on a deep well of proven methods, frameworks, and approaches, we bring them to bear in a customized approach designed for your specific needs.*
- **Strategic perspective joined with an urgency for action**  
*We combine strategic, objective perspective with practical, action-oriented approaches. We know our clients are working on urgent problems and don’t time for “strategy studies” that are disengaged from driving real impact for real people. We don’t, either—there is too much important work to be done.*
- **A collaborative model that draws from our collective strengths**  
*We know our clients know a lot. And we believe we know even more together. We strive to bring the best out of our collective team to build solutions that neither of us could generate alone. We work shoulder-to-shoulder with clients and are equally effective and comfortable in the classroom as we are in the boardroom.*
- **Deep commitment to sustainable impact and relationships**  
*We only work where we believe that significant impact will outlive our involvement. We do not write reports that sit on shelves. We build reality into our thinking. We work with your team in ways that build your passion, commitment, capability and capacity to take action. We help you think about the best way to achieve your aims, whether that includes us or not.*

## Relevant Experience

### Key Experiences

- Bell Creek has nationally recognized expertise in School Portfolio Management having supported multiple districts in the development and implementation of best-in-class approaches to systematically moving schools to higher performance.
- In recent projects, Bell Creek:
  - Built strong school and neighborhood-level analytics, planned and conducted thoughtful stakeholders outreach, and aligned leadership on school intervention levers and the criteria for their application.
  - Delivered a clearly documented and sustainable process that included tools and templates for analytics, stakeholder engagement, and senior decision making meetings, customized for each district’s specific context
  - Grew capacity and expertise of staff, especially those primarily tasked with facilitating the school portfolio decision making process, to allow them to pick up and deploy the process without interruption and with an eye toward continuous improvement over time.
  - Strengthened the ‘connective tissue’ between departments and functions at both the leadership and staff levels and helped architect and deliver efforts to cultivate a culture of collaboration and data-driven decision making.

## Key Staff

### Star Wallin, Founder & Principal

- Founder and CEO, Bell Creek Consulting, 2012-present
  - Leader of Bell Creek's School Portfolio Management service line
  - Related areas of expertise include: strategy design and implementation, governance and complex decision making, top team alignment, talent management, change management, capability building programs, and business process improvement
- Teacher, District of Columbia Public Schools, 2010-2012
  - Led efforts to assess student progress and design and implement interventions in support of students' academic and behavioral success.
- Engagement Management, McKinsey & Company, 2006-2010
  - Led projects across the public, private, and social sectors at this globally renowned strategic consulting firm

### Matthew Van Itallie

- Senior Consultant, Bell Creek Consulting, 2013-present
  - Brings deep expertise in school performance analytics, system-wide performance management, and process design
- Founder and Managing Partner, Canterbury Road Partners, a Higher Education Software and Innovation Management Startup, 2012-2014
- Transformation Executive for Urban School Systems, 2008-2011
  - Roles included Chief Accountability Officer for Baltimore City Public Schools, Strategy and Operations Advisor to the KIPP Foundation, and Deputy Chief of Staff for District of Columbia Public Schools

## 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
<ul style="list-style-type: none"><li>• Chief Executive Officer of Chicago Public Schools, 2011-2012</li><li>• Superintendent of Schools for Rochester, NY School District, 2008-2011</li><li>• Regional Superintendent, NYC Department of Education, 2006-2007</li><li>• Executive Director of Secondary Schools, NYC Department of Education, 2005-2006</li></ul>

## 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
<ul style="list-style-type: none"><li>• Designed and implemented Curriculum Institutes for Elementary, Middle and High schools.</li><li>• Created individualized school academic intervention programs using assessment data and other school information relative to instructional practices.</li><li>• Designed and created a collaborative team planning form to be used in content specific PLCs.</li><li>• Designed and implemented professional development evaluation forms to be used with all the campuses' staff developments.</li><li>• Designed a content minute model, which allowed teachers to optimize instructional time and create consistency during instruction across content areas.</li><li>• Collaborated on school master schedule</li><li>• Collaborated and created school's responsibility chart.</li></ul>

### Key Staff

Dr. Malika Martin, Owner/Operator/Consultant
<ul style="list-style-type: none"><li>• Adjunct Professor, Houston Community College, 2010-Present</li><li>• Educational Consultant, Fundamentals for Education, LLC, 2013-Present</li><li>• Educational Consultant, Bradford Solutions, LLC, 2004-2013</li><li>• Mathematics &amp; Science School Improvement Specialist, Spring Branch ISD, 2005-2008</li></ul>
Terrian Shackelford, Co-Owner, Consultant
<ul style="list-style-type: none"><li>• Adjunct Instructor, LeNotre Culinary Institute, 2014-Present</li><li>• Educational Consultant, Fundamentals for Education, LLC, 2013-Present</li><li>• Consultant &amp; Tutor, Bradford Solutions, LLC, 2004-2013</li><li>• Mathematics Teacher, Houston ISD, 1995-2004</li></ul>
Elaine Lewis, Consultant
<ul style="list-style-type: none"><li>• Educational Consultant, Houston ISD, 2014-Present</li><li>• High School Principal, Houston ISD, 2009-2014</li><li>• Dean of Instruction, Houston ISD, 1998-2009</li></ul>
Mark Spillman, Consultant
<ul style="list-style-type: none"><li>• Educational Consultant, Fundamentals for Education, LLC, 2014-Present</li><li>• Adjunct Instructor, University of Houston Downtown, 2013-Present</li><li>• Instructional Coach, Houston ISD, 2015-2017</li><li>• Dean of Instruction, Woodson K8, 2013-2015</li></ul>

## 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.

## McREL International:

**Other Approved Levers:** *Lever 4: Build*

*Helping educators flourish by turning research into solutions that transform teaching, learning, and leading.*

### Relevant Experience

#### Key Experiences with Multiple Clients

- Customized services to reflect the specific needs of the student population rather than using a one-size-fits-all approach.
- Developed processes and systems for continuous improvement, data collections and review, adoption and implementation of research-based practices, and building capacity to strengthen leadership.
- Analyzed math and English language arts curriculum documents using a curriculum evaluation tool, co-developed by McREL and the district, to determine the alignment of district curriculum to state standards and to assess how often and with what depth each standard was addressed in the curriculum.
- Analyzed district assessment policies and practices, and district-developed or selected assessments to determine how well assessment practices were aligned with the expectations of the CCSS, and to determine alignment of assessments with the content and instructional shifts of the state standards.
- Administered a teacher and leader survey (co-developed by the client and McREL) about implementation of the instructional shifts required by the state standards.
- Conducted classroom observations to collect data about implementation of identified instructional practices.
- Partnered with district and school leaders to regularly review data, plan for next steps, and develop tools to support schools in their improvement and innovation efforts, recognizing that each school has different needs, based on where it is along the continuum.
- Guided district leadership team in establishing success criteria and data collection plans for each action step in their improvement process, and continue to work with them to monitor data and plan for next leadership actions.

### Key Staff

#### Adena Miller, Managing Consultant

Managing Consultant, McREL International, 2015-present

Previously: School District Response to Intervention Manager; Principal Consultant, Colorado Department of Education; Special Education Teacher

- Coordinates and facilitates organizational, financial, programming, and planning.
- Provides technical assistance supporting districts as they work to increase student achievement through program and curriculum development.
- Designs and delivers high-quality professional learning and capacity building for education professionals through face-to-face and technology-enhanced means.
- Works closely with principals, superintendents, and other educational leaders to develop research-based guaranteed and viable curricula and instructional programs that align with state and national standards.

#### Ben Cronkright, Consultant

Consultant, McREL International, 2016-present

Previously: Federal Program Manager, Hawaii Department of Education; Principal; Assistant Principal; Teacher

- Develops and delivers technical assistance services and coordinates research and evaluation projects.
- Coordinates planning and delivery of professional development and consulting services for state, school, and district-level systems improvement, leadership development, educator effectiveness, and educator evaluation.
- Increased stakeholders' understanding of the use of data, research, and evaluation in examining and affecting the implementation, assessment, and ongoing improvement of a variety of educational initiatives, including the development and implementation of a teacher evaluation system.
- Developed and designed statewide academic performance measures for all public charter schools across the state of Hawaii.

### **Kent Davis, Associate Director**

Associate Director, McREL International, 2011-present

Previously: Associate Superintendent; School District Regional Director; Principal; Assistant Principal; Teacher

- Plans and delivers professional learning and coaching services for school and district leadership teams to learn and implement leadership practices that support student learning.
- Facilitates school and district leadership teams in conducting needs assessments, analyzing data, and planning for improvement, including setting goals and determining success criteria.
- Provides technical assistance supporting schools and districts as they work to reduce variability in teacher practices and increase student achievement through alignment of programs, services, goals, and actions.
- Engages school and district leadership teams in school and district improvement planning processes, driven by research-based indicators of success.

### **Shelby Danks, Managing Researcher**

Managing Researcher, McREL International, 2017-present

Previously: District Continuous Quality Improvement (CQI) Leader; School District Performance Measurement Analyst; Staff Development Specialist; Classroom Teacher

- Collaborates with McREL's partners and clients to design and deploy project plans and research protocols (including measurement tools and processes) to facilitate the appropriate use and interpretation of results for clients, as well as strategic decision making.
- Uses mixed methods to analyze data for program evaluations, research initiatives, and needs assessments.
- Developed performance-based, analytic rubric/instrument used by campus administrators to self-assess their project-based learning leadership practices.
- Developed an end-of-program assessment, associated assessment templates, and a performance-based scoring rubric instrument to assess the extent to which teacher candidates demonstrate goals of their teacher education program.
- Designed and facilitated workshop to build capacity for faculty and staff to design additional assessments and rubrics for their programs.

### **Kathleen Dempsey, Senior Director**

Senior Director, McREL International, 2007-present; Director of the North Central Comprehensive Center, 2010-present

Previously: School District Mathematics Coordinator; Staff Developer; Teacher

- Provides technical assistance and professional learning services to K–12 educators and state education agencies.
- Designs and conducts curriculum and instruction audits for schools and districts.
- Led research team and provided professional learning for teachers focused on effective use of formative assessment in mathematics classrooms.

- Designs and delivers professional learning and consulting services about standards alignment, curriculum development, research-based instructional strategies, mathematics education, and differentiated instruction, among other topics.

#### **Dale Lewis, Senior Director**

Senior/Executive Director, McREL International, 2015-present

Previously: Director of Texas Comprehensive Center (through SEDL/AIR); Consultant/Program Manager; School District Director of Special Education; Educational Diagnostician; Special Education Teacher

- Facilitates needs assessment and development of innovation configuration maps to support continuous improvement.
- Use tools, such as *Stages of Concern* and *Levels of Use* protocols, to help schools and districts determine progress of implementation efforts and plan for next steps.
- Engages clients in strategic planning to achieve results, based on focused goals.
- Utilizes various data to help clients determine strengths and areas for growth, with a focus on leveraging “bright spots” for improvement.

#### **Kristin Rouleau, Senior Director**

Senior Director, McREL International, 2014-present

Previously: School District Coordinator of Curriculum; Principal; Curriculum Specialist and Staff Developer; Teacher

- Facilitates systematic improvement processes for individuals, schools, districts, and education agencies.
- Develops and delivers responsive, customized professional learning to help schools and districts achieve their goals, with an emphasis on curriculum and standards alignment, high-leverage instructional strategies, use of data, and leadership development.
- Collaborates with district leaders to design interactive professional learning to advance participants’ understanding of the technical and adaptive challenges involved in implementing change initiatives.
- Engaged leaders in instructional rounds process to identify bright spots and articulate the systems and supports needed to expand those examples to more classrooms and schools.

## N2 Learning, L C:

**Other Approved Levers:** *Lever 4: Build*

N2 Learning's mission is to help school districts achieve their highest aspirations. As no two school districts are alike, no two N2 projects are alike. Our experienced team offers proven success in all areas of public education with specialization in assessment and accountability, leadership and professional development, strategic planning, and transformational learning environments. We are dedicated to partnering with clients to customize projects that facilitate change and ensure success.

### Relevant Experience

Key Experiences
<ul style="list-style-type: none"><li>• Developed systematic plans of protocols in school districts to ensure a consistent approach to continuous improvement for student learning outcomes at all schools.</li><li>• Facilitated the implementation of systematic components of instructional processes and planning with a focus on standards and assessment for an optimal learning culture.</li><li>• Assisted school leadership in an aligned system of support utilizing the Texas Accountability Intervention System.</li><li>• Facilitated district and school improvement planning processes, including comprehensive portfolio data, with stakeholders annually.</li></ul>

### Key Staff

Dr. Susan Borg, Senior Associate
<ul style="list-style-type: none"><li>• Served as associate superintendent for instruction and student services in a large, suburban district (51,000+ students and 42 campuses)</li><li>• Provided educational leadership for 35 years in the roles of teacher, assistant principal, principal, executive director, and associate superintendent</li><li>• Led the development and implementation of a 5-year initiative to help campus and teacher leaders focus on transforming learning environments and improving student engagement; work based on articles of <i>Creating a New Vision for Public Education in Texas</i> (Visioning Document)</li><li>• Provided leadership development to administrators based on the Visioning Document</li><li>• Provide consultative services to educational institutions and charter schools related to executive coaching, professional development, and special projects</li></ul>
Dr. Linda Mora, Senior Associate
<ul style="list-style-type: none"><li>• Served as deputy superintendent for curriculum and instruction in a large, urban/suburban district (105,000+ students and 119 campuses)</li><li>• Provided educational leadership for 45 years in the roles of teacher, assistant principal, principal, associate superintendent, and deputy superintendent</li><li>• Guided the development and implementation of a long-term professional development series for campus leaders focused on the Visioning Document</li><li>• Developed and implemented the process for providing direct support to struggling schools</li><li>• Developed and implemented training for first-year principals and their mentors</li><li>• Assisted school districts, education service centers, and education related associations with planning and decision-making processes, preparing for accountability on-site visits, and providing team building training</li><li>• Provided oversight of the implementation of the state's monitoring system in seven areas: accreditation, district effectiveness and compliance, school governance, equal educational opportunity, complaints investigations, non-traditional schools, and special data inquiries</li></ul>

- Provide consultative services to education entities related to executive coaching, professional development, mediation, and special projects

#### **Stephanie Edgar, Associate**

- Served as director of campus instructional support in a large, suburban district (51,000+ students and 42 campuses)
- Provided educational leadership for 36 years in the roles of teacher, instructional specialist, program coordinator, and director
- Developed and provided differentiated professional development for campus administrators aligned to current level of experience and instructional needs
- Trained administrators on the school improvement plan process, provided assistance, and monitored the development and implementation of plans
- Guided the development and implementation of a 5-year initiative to help campus and teacher leaders focus on transforming learning environments and improving student engagement; work based on articles of the Visioning Document
- Provided leadership development to administrators based on the Visioning Document
- Provide consultative services to educational institutions and charter schools related to executive coaching, professional development, and special projects

## 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

<b>Knightdale High School, Collaborative Design School Redesign Project</b>
<ul style="list-style-type: none"><li>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.</li></ul>
<b>Johnston County Schools, Project-Based Learning (PBL) Project</b>
<ul style="list-style-type: none"><li>Supported a district-level task force focused on developing teachers to support a self-directed PBL performance framework.</li><li>Supported a central office to assess and match schools from a district portfolio to participate in an instructional initiative.</li><li>Developed an aligned assessment, planning and implementation process.</li></ul>

### Key Staff

<b>Dr. Angela Quick, Senior Education Consultant</b>
<ul style="list-style-type: none"><li>Senior Vice President/Interim CEO, NC New Schools, 2013-2016<ul style="list-style-type: none"><li>Created, implemented, and monitored a 20-million-dollar i3 federal grant</li></ul></li><li>Deputy Chief Academic Officer &amp; Academic Services and INstructional Support, North Carolina Department of Public Instruction, 2008-2013<ul style="list-style-type: none"><li>Facilitated all curricular and assessment programming</li></ul></li></ul>
<b>Dr. Kaleen Healey, Senior Education Consultant</b>
<ul style="list-style-type: none"><li>Research Scientist, University of Chicago Consortium on School Research, 2012-2016<ul style="list-style-type: none"><li>Designed and implemented mixed-method studies</li></ul></li></ul>
<b>Dr. Laurie Baker, Senior Education Consultant</b>
<ul style="list-style-type: none"><li>Senior Director of Client Services, NC New Schools/Breakthrough Learning, 2015-2016<ul style="list-style-type: none"><li>Managed national expansion activities and programmatic oversight for a \$20M grant.</li></ul></li><li>Director of School Services, North Carolina New Schools, 2013-2015<ul style="list-style-type: none"><li>Led national expansion to develop the capacity of schools and districts to create opportunities for traditionally underrepresented students to graduate</li></ul></li></ul>
<b>Dr. Robin Wisniewski, Senior Education Consultant</b>
<ul style="list-style-type: none"><li>Director of Research and Consulting, McREL International, 2012-2015</li><li>Director, University of Arizona, 2011-2012</li><li>Director (Founding), Baldwin-Wallace University Berea, 2005-2011</li></ul>

## Taca Consulting:

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

### Relevant Experience

Key Experiences
<ul style="list-style-type: none"><li>• Oversaw the instructional and operational activities at four Baltimore public STEM schools.</li><li>• Developed the core components of the academic model including school improvement planning tools, school evaluation rubrics, and ways to monitor instructional quality.</li><li>• Led the team of field consultants to develop school and district effectiveness frameworks that diagnosed school and district performance.</li><li>• 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.</li><li>• 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.</li></ul>

### Key Staff

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



## 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

### Bellwether Education Partners:

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

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

### Relevant Experience (selected examples)

The Mind Trust
<ul style="list-style-type: none"><li>• Bellwether provided research, analysis, and strategic advising support for The Mind Trust’s efforts to facilitate creation of Innovation Network Schools (INS) in Indianapolis.</li><li>• Conducted research on models of district-charter collaboration and non-charter autonomous schools in other districts around the country, and identified best practices and key issues to address in the contract between the district and the INS school operator.</li></ul>
Accelerate Great Schools Cincinnati
<ul style="list-style-type: none"><li>• Wrote a five-year business plan for a new city-based intermediary to support the creation of 15,000 high-performing seats in district, charter, and Catholic schools over the next 10 years.</li><li>• Built a fact-based understanding of how other city intermediaries approach quality seat creation and developed a detailed understanding of the existing Cincinnati landscape, including current gaps in high-quality education options.</li><li>• Analyzed data on educational achievement gaps, developed a model to calculate the current need for and supply of high-performing school seats, projected a rollout and expansion pathway to build supply to meet unmet needs, and developed a financial model for the Accelerator.</li><li>• Helped craft the new organization’s mission, goals, and five-year organizational priorities, and developed a staffing plan, governance model, and financial model to support the successful implementation of those priorities.</li></ul>
Boston Schools Fund Strategic Planning
<ul style="list-style-type: none"><li>• Created a strategic plan for a new nonprofit that would be singularly focused on increasing the number of schools serving low-income students and generating outstanding academic outcomes, regardless of governance structure.</li><li>• Built a fact-based understanding of the Boston landscape, led multiple focus groups and stakeholder engagement sessions, and partnered with the Boston fund’s founder to craft a plan for a highly targeted fund with seat-creation goals.</li></ul>

### Key Staff

Mary Kroupa Wells, Co-Founder & Managing Partner
<ul style="list-style-type: none"><li>• Bellwether Education Partners, 2008-Present<ul style="list-style-type: none"><li>◦ Co-founded and lead national non-profit whose mission is to help education organizations become more effective and achieve dramatic results, especially for underserved students. Manage budget of over \$11M and staff of over 50.</li><li>◦ Provide strategic planning and implementation support to a wide variety of education organizations, with a focus on school systems, human capital providers and entrepreneurs.</li></ul></li></ul>

- Redesigned the business model with an alternative teacher preparation program to enhance the financial sustainability of the organization while improving the participant value proposition.
  - Supported large district to build out personalized learning strategy, including identifying central systems and supports and process to support the creation of cohorts of innovative pilot schools.
  - Supported several entrepreneurs in building out initial business plans to support the launch of new ventures and provided executive advisory support during the startup phase.
- Senior Program Officer, Communities Foundation of Texas, 2004-2007
  - Designed and managed secondary education reform initiative to transform science, technology, engineering, and mathematics (STEM) education in Texas.
  - Led the design and implementation of grant support programs to ensure quality and consistency of results.

#### **Lina Bankert, Partner, Strategic Advising**

- Bellwether Education Partners, 2012-Present
  - Organizational/issue area expertise: districts, charter management organizations, foundations, teacher and leader effectiveness, college access and persistence
  - Capability expertise: strategic planning, business plan development, growth and expansion strategy, human capital and organizational design, performance improvement and sustainability, and grant development and implementation
- Consultant, Manager, & Principal, Bain & Company, 2005-2012
  - Led work with executive teams across a broad range of industries and capabilities in both the private and public sectors
  - Led final design and startup of a K-8 charter school in Chicago

#### **Katie Vivalo Rouse, Associate Partner, Strategic Advising**

- Bellwether Education Partners, 2017-Present
  - Member of Strategic Advising leadership team; Manages project teams to deliver high impact strategies and plans to support strategic growth and expansion; organizational design and effectiveness; and performance improvement.
  - Clients served include charter management organizations, districts, education nonprofits and entrepreneurs.
- Chief Operating Officer, DC Prep, 2013-2016
  - Implemented first ever transparent internal role transition and promotion process providing opportunity for teachers and leaders to apply for vacant roles.
  - Led team to hire for over 100 roles annually using improved data tracking, rubrics, screening tools and processes.
  - Managed operations across five campuses and home office including launching a new campus.
  - Developed human resources function to support growing organization including moving paper processes to electronic, writing and updating policies to support employees and training managers on policy and management.
- Broad Resident, Chicago Public Schools, 2011-2013
  - Led consulting and internal teams to develop first draft of educational master facilities plan.
  - Led labor relations team to analyze financial impact of proposed policies
  - Organized first annual back-to-school leadership development event for 1,700 teachers and parents.

## 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
<ul style="list-style-type: none"><li>• Created and collaborated on school's content specific non-negotiables.</li><li>• Created an Accountability and Responsibility Guide to be used in all of our Academic Academies.</li><li>• Designed and collaborated on an Enrichment/Remediation Summer Workshop for incoming 9<sup>th</sup> grade students.</li><li>• Designed and implemented a meet and greet social for students and parents participating in our Academic Academy.</li><li>• Designed and implemented a "Enhancement Models" that is designed to help teachers improve and enhance their instructional practices based on their individual needs.</li><li>• Designed and implemented "Master Mathematics Programs" for Elementary, Middle, and High schools.</li></ul>

### Key Staff

Dr. Malika Martin, Owner/Operator/Consultant
<ul style="list-style-type: none"><li>• Adjunct Professor, Houston Community College, 2010-Present</li><li>• Educational Consultant, Fundamentals for Education, LLC, 2013-Present</li><li>• Educational Consultant, Bradford Solutions, LLC, 2004-2013</li><li>• Mathematics &amp; Science School Improvement Specialist, Spring Branch ISD, 2005-2008</li></ul>
Terrian Shackelford, Co-Owner/Consultant
<ul style="list-style-type: none"><li>• Adjunct Instructor, LeNotre Culinary Institute, 2014-Present</li><li>• Educational Consultant, Fundamentals for Education, LLC, 2013-Present</li><li>• Consultant &amp; Tutor, Bradford Solutions, LLC, 2004-2013</li><li>• Teacher, Houston ISD, 1995-2004</li></ul>
Elaine Lewis, Consultant
<ul style="list-style-type: none"><li>• Educational Consultant, Fundamentals for Education, LLC, 2014-Present</li><li>• High School Principal, Houston ISD, 2009-2014</li><li>• Dean of Instruction, Houston ISD, 1998-2009</li></ul>
Mark Spillman, Consultant
<ul style="list-style-type: none"><li>• Educational Consultant, Fundamentals for Education, LLC, 2014-Present</li><li>• Adjunct Instructor, University of Houston Downtown, 2013-Present</li><li>• Instructional Coach, Houston ISD, 2015-2017</li><li>• Dean of Instruction, Woodson K8, 2013-2015</li></ul>

## 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

<b>Deputy Superintendent/Chief of Strategy &amp; Portfolio Management, Tennessee Achievement School District, 2011-2017</b>
<ul style="list-style-type: none"><li>• 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.</li><li>• 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)</li><li>• 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.</li></ul>
<b>Systems Director/Co-Assistant Principal, New Orleans Charter Science and Math HS, 2006-2010</b>
<ul style="list-style-type: none"><li>• Founding team member of New Orleans's first charter high school post-Hurricane Katrina.</li></ul>



## 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

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

### Key Staff

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

## 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

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

### Key Staff

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

## 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

## Bellwether Education Partners:

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

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

## Relevant Experience

Enroll Indy
<ul style="list-style-type: none"><li>Helped develop several important inputs for the enrollment system through best practice research, refining the theory of change, and developing targeted short-term action steps.</li><li>Developed a flexible five-year operating and financial model that set Enroll Indy on a path toward long-term sustainability and served as a tool to assess the financial impact of changes as the unified enrollment program evolves and operational factors adjust.</li></ul>
Innovation in Public School Choice
<ul style="list-style-type: none"><li>Supported the Institute for Innovation in Public School Choice (IIPSC) in developing a five-year strategic expansion plan. IIPSC works with cities and school systems interested in developing a common enrollment system that is equitable, efficient, and transparent for families.</li><li>Explored various elements of developing a more equitable system of choice, and identified the ways that IIPSC could support decision-makers in cities to reduce the barriers to a fair system of school choice.</li></ul>

## Key Staff

Mary Kroupa Wells, Co-Founder & Managing Partner
<ul style="list-style-type: none"><li>Bellwether Education Partners, 2008-Present<ul style="list-style-type: none"><li>Co-founded and lead national non-profit whose mission is to help education organizations become more effective and achieve dramatic results, especially for underserved students. Manage budget of over \$11M and staff of over 50.</li><li>Provide strategic planning and implementation support to a wide variety of education organizations, with a focus on school systems, human capital providers and entrepreneurs.</li><li>Redesigned the business model with an alternative teacher preparation program to enhance the financial sustainability of the organization while improving the participant value proposition.</li><li>Supported large district to build out personalized learning strategy, including identifying central systems and supports and process to support the creation of cohorts of innovative pilot schools.</li><li>Supported several entrepreneurs in building out initial business plans to support the launch of new ventures and provided executive advisory support during the startup phase.</li></ul></li><li>Senior Program Officer, Communities Foundation of Texas, 2004-2007<ul style="list-style-type: none"><li>Designed and managed secondary education reform initiative to transform science, technology, engineering, and mathematics (STEM) education in Texas.</li><li>Led the design and implementation of grant support programs to ensure quality and consistency of results.</li></ul></li></ul>
Steph Itelman, Principal

- Bellwether Education Partners, 2013-Present
  - Serve on leadership team of Strategic Advising practice (15-20 consulting staff): lead consulting engagements with change agents in public education reform, including districts, charter management organizations (CMOs), foundations, and education entrepreneurs.
  - Collaborate with and support clients on their most pressing strategic and operational issues through rigorous analysis and project and change management; work includes strategic planning, business plan development, growth and expansion strategy, human capital and organizational redesign, performance improvement and sustainability, and Federal grant development and implementation.
- Chief of Staff to the CEO, Aspire Public Schools
  - Provided input on behalf of CEO; focused CEO time on priority activities; led cross-functional projects; managed ad hoc projects. Provided input in strategic planning process leading to decision to expand outside of California to Memphis, TN.
  - In absence of full time COO throughout tenure as chief of staff, led multiple strategic initiatives including, framework for assessing future strategic decisions, strategic data usage by management team, roll-out of compensation initiatives, political and operations functions for legal issues and renewal of Statewide Benefit Charter, and evolving governance and leadership structures

## 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
<ul style="list-style-type: none"><li>• Chief Executive Officer of Chicago Public Schools, 2011-2012</li><li>• Superintendent of Schools for Rochester, NY School District, 2008-2011</li><li>• Regional Superintendent, NYC Department of Education, 2006-2007</li><li>• Executive Director of Secondary Schools, NYC Department of Education, 2005-2006</li></ul>

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

### Key Staff

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

## 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

## Bellwether Education Partners:

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

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

## Relevant Experience

### Cullen Foundation, Buffalo Public Schools, and Local Charter Schools

- Partnered with The Cullen Foundation to understand the current and future talent needs of the charter schools and traditional public schools operating in Buffalo, and the potential strategies to address those needs at both the sector and school levels.
- Assessed the degree to which schools within Buffalo, NY are functioning as talent-ready organizations today (i.e. innovative, effectively managed, great places to work that generate sustainable results and durable, authentic relationships with the communities they serve), the current perceptions and experiences of staff members at all levels, and the greatest strengths and challenges around attracting and developing talent.
- Projected talent hiring needs (teacher, teacher leader and school leader; and by grade and subject are) across the Buffalo public school sector over the next ten years.
- Mapped the current sources of talent and identified potential additional sources of talent with proven programs or newly incubated programs.
- Defined a specific set of strategic options that Cullen Foundation can pursue to strengthen the talent pipeline across both charters and traditional public schools.

### Pharr San Juan Alamo ISD and IDEA Public Schools

- Facilitated a partnership between PSJA ISD and IDEA to work side-by-side to develop a best in-class, comprehensive human capital system that addresses all phases of the talent pipeline.

## Key Staff

### Mary Kroupa Wells, Co-Founder & Managing Partner

- Bellwether Education Partners, 2008-Present
  - Co-founded and lead national non-profit whose mission is to help education organizations become more effective and achieve dramatic results, especially for underserved students. Manage budget of over \$11M and staff of over 50.
  - Provide strategic planning and implementation support to a wide variety of education organizations, with a focus on school systems, human capital providers and entrepreneurs.
  - Redesigned the business model with an alternative teacher preparation program to enhance the financial sustainability of the organization while improving the participant value proposition.
  - Supported large district to build out personalized learning strategy, including identifying central systems and supports and process to support the creation of cohorts of innovative pilot schools.
  - Supported several entrepreneurs in building out initial business plans to support the launch of new ventures and provided executive advisory support during the startup phase.
- Senior Program Officer, Communities Foundation of Texas, 2004-2007

- Designed and managed secondary education reform initiative to transform science, technology, engineering, and mathematics (STEM) education in Texas.
- Led the design and implementation of grant support programs to ensure quality and consistency of results.

#### **Jeff Schulz, Principal**

- Bellwether Education Partners, 2012-Present
  - Serve on leadership team of Strategic Advising practice (15-20 consulting staff): lead strategic planning and implementation support engagements with a wide variety of education organizations, with a focus on school districts, charter schools, intermediaries, human capital providers and entrepreneurs.
  - Capability expertise: strategic planning, business plan development, growth and expansion strategy, human capital and organizational design, performance improvement and sustainability, and grant development and implementation
  - Led business planning efforts to launch “great schools” intermediaries in Boston, MA; Cincinnati, OH; and the state of New Mexico.

## 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

- 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

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

- 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)

## McREL International:

**Other Approved Levers:** *Lever 1: Establish*

*Helping educators flourish by turning research into solutions that transform teaching, learning, and leading.*

### Relevant Experience

#### Key Experiences

- Facilitate the design of a process for district leaders to learn through participation in instructional rounds.
- Helped synthesize and analyze the data collected through instructional rounds and predict the conditions that had to be present in each setting as well as the district and regional levels for powerful learning to occur.
- Designed and facilitated processes for data review, action planning, and reflection that have led to intentional decision-making about programming, including the supports needed by both teachers and school leaders to successfully implement innovative instructional programs for all students.
- Partnered with district leaders to build capacity of building staff to lead efforts to reduce instructional variability and increase personalized learning opportunities for all students.
- Supported development of instructional supervisors who observe teachers, monitor curriculum implementation, and lead implementation of curriculum initiatives, by focusing supervisors on leadership practices that support their work.
- Guided district staff in designing and implementing effective professional learning experiences for teachers focused on district and school goals, using best practices for adult learners.
- Supported principals and district leaders in understanding the specific leadership responsibilities associated with managing change, and then coached the leaders to determine their school needs relative to how individuals experience change. With this information, the leaders were able to plan the appropriate support needed for teachers to be successful with the change initiative, with attention to specific leadership actions likely to result in a positive outcome.
- Partnered with district leaders to build capacity of teachers to understand, plan for, and implement curriculum standards.
- Designed and implemented a professional learning and coaching plan for school-level leaders, teacher leaders, peer coaching teams, and individual classroom teachers.
- Built capacity for district in developing processes and protocols for curriculum implementation, instructional materials selection, lesson development, and decision-making.

### Key Staff

#### Adena Miller, Managing Consultant

Managing Consultant, McREL International, 2015-present

Previously: Response to Intervention Manager, Denver Public Schools; Principal Consultant, Colorado Department of Education; Special Education Teacher

- Coordinate and facilitate organizational, financial, programming, and planning.
- Provide technical assistance supporting districts as they work to increase student achievement through program and curriculum development.
- Design and deliver high-quality professional learning and capacity building for education professionals through face-to-face and technology-enhanced means.
- Works closely with principals, superintendents, and other educational leaders to develop research-based guaranteed and viable curricula and instructional programs that align with state and national standards.

#### Ben Cronkright, Consultant

Consultant, McREL International, 2016-present

Previously: Federal Program Manager, Hawaii Department of Education; Principal; Assistant Principal; Teacher

- Develops and delivers technical assistance services and coordinates research and evaluation projects.
- Coordinates planning and delivery of professional development and consulting services for state, school, and district-level systems improvement, leadership development, educator effectiveness, and educator evaluation.
- Developed schoolwide teacher/instructional program development model to provide teaching and learning reliability at all grade levels and all content areas schoolwide.
- Developed schoolwide reading and math intervention programs using the Response to Intervention Framework.
- Piloted 1:1 iPad classroom initiative to support district-wide efforts in the purposeful use of educational technology to support closing achievement gaps.

### **Kent Davis, Associate Director**

Associate Director, McREL International, 2011-present

Previously: Associate Superintendent; School District Regional Director; Principal; Assistant Principal; Teacher

- Plan and deliver professional learning and coaching services for school and district leadership teams to learn and implement leadership practices that support student learning.
- Facilitate school and district leadership teams in conducting needs assessments, analyzing data, and planning for improvement, including setting goals and determining success criteria.
- Provide technical assistance supporting schools and districts as they work to reduce variability in teacher practices and increase student achievement through alignment of programs, services, goals, and actions.
- Engage school and district leadership teams in school and district improvement planning processes, driven by research-based indicators of success.
- Serve as coach for school- and district-level leaders, using McREL's *Balanced Leadership* professional learning as a research-based foundation to guide leader actions.

### **Kathleen Dempsey, Senior Director**

Senior Director, McREL International, 2007-present; Director of the North Central Comprehensive Center, 2010-present

Previously: School District Mathematics Coordinator; Staff Developer; Teacher

- Provides technical assistance and professional learning services to K–12 educators and state education agencies.
- Designs and conducts curriculum and instruction audits for schools and districts.
- Designs and delivers professional learning and consulting services about standards alignment, curriculum development, research-based instructional strategies, mathematics education, and differentiated instruction, among other topics.
- Led research team and provided professional learning for teachers focused on effective use of formative assessment in mathematics classrooms.

### **Dale Lewis, Senior Director**

Senior/Executive Director, McREL International, 2015-present

Previously: Director of Texas Comprehensive Center (through SEDL/AIR); Consultant/Program Manager; School District Director of Special Education; Educational Diagnostician; Special Education Teacher

- Facilitates needs assessment and development of innovation configuration maps to support continuous improvement.
- Use tools, such as *Stages of Concern* and *Levels of Use* protocols, to help schools and districts determine progress of implementation efforts and plan for next steps.
- Engages clients in strategic planning to achieve results, based on focused goals.
- Utilizes various data to help clients determine strengths and areas for growth, with a focus on leveraging “bright spots” for improvement.

### **Kristin Rouleau, Senior Director**

Senior Director, McREL International, 2014-Present

Previously: School District Coordinator of Curriculum; Principal; Curriculum Specialist and Staff Developer; Teacher

- Facilitates systematic improvement processes for individuals, schools, districts, and education agencies.
- Develops and delivers responsive, customized professional learning to help schools and districts achieve their goals, with an emphasis on curriculum and standards alignment, high-leverage instructional strategies, use of data, and leadership development.
- Collaborates with district leaders to design interactive professional learning to advance participants’ understanding of the technical and adaptive challenges involved in implementing change initiatives.
- Engaged leaders in instructional rounds process to identify bright spots and articulate the systems and supports needed to expand those examples to more classrooms and schools.

## N2 Learning, L C:

### **Other Approved Levers:** *Lever 1: Establish*

N2 Learning's mission is to help school districts achieve their highest aspirations. As no two school districts are alike, no two N2 projects are alike. Our experienced team offers proven success in all areas of public education with specialization in assessment and accountability, leadership and professional development, strategic planning, and transformational learning environments. We are dedicated to partnering with clients to customize projects that facilitate change and ensure success.

### Relevant Experience

#### Key Experiences

- Implemented campus support teams and differentiated professional development for administrators and teachers that resulted in campus learning environments focused on maximizing student outcome.
- Partnered with the Human Resources for optimal talent acquisition for campuses.
- Facilitated the implementation of the continuous improvement of critical success factors including leadership effectiveness and teacher quality.
- Fostered a culture of district ownership and accountability with commitments to continuous improvement and innovation at lower performing schools.

### Key Staff

#### Dr. Susan Borg, Senior Associate

- Served as associate superintendent for instruction and student services in a large, suburban district (51,000+ students and 42 campuses)
- Provided educational leadership for 35 years in the roles of teacher, assistant principal, principal, executive director, and associate superintendent
- Led the development and implementation of a 5-year initiative to help campus and teacher leaders focus on transforming learning environments and improving student engagement; work based on articles of *Creating a New Vision for Public Education in Texas* (Visioning Document)
- Provided leadership development to administrators based on the Visioning Document
- Provide consultative services to educational institutions and charter schools related to executive coaching, professional development, and special projects

#### Dr. Linda Mora, Senior Associate

- Served as deputy superintendent for curriculum and instruction in a large, urban/suburban district (105,000+ students and 119 campuses)
- Provided educational leadership for 45 years in the roles of teacher, assistant principal, principal, associate superintendent, and deputy superintendent
- Guided the development and implementation of a long-term professional development series for campus leaders focused on the Visioning Document
- Developed and implemented the process for providing direct support to struggling schools
- Developed and implemented training for first-year principals and their mentors
- Assisted school districts, education service centers, and education related associations with planning and decision-making processes, preparing for accountability on-site visits, and providing team building training
- Provided oversight of the implementation of the state's monitoring system in seven areas: accreditation, district effectiveness and compliance, school governance, equal educational opportunity, complaints investigations, non-traditional schools, and special data inquiries
- Provide consultative services to education entities related to executive coaching, professional development, mediation, and special projects



### **Stephanie Edgar, Associate**

- Served as director of campus instructional support in a large, suburban district (51,000+ students and 42 campuses)
- Provided educational leadership for 36 years in the roles of teacher, instructional specialist, program coordinator, and director
- Developed and provided differentiated professional development for campus administrators aligned to current level of experience and instructional needs
- Trained administrators on the school improvement plan process, provided assistance, and monitored the development and implementation of plans
- Guided the development and implementation of a 5-year initiative to help campus and teacher leaders focus on transforming learning environments and improving student engagement; work based on articles of the Visioning Document
- Provided leadership development to administrators based on the Visioning Document
- Provide consultative services to educational institutions and charter schools related to executive coaching, professional development, and special projects

## 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

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

### Key Staff

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

## 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

## TNTP:

**Other Approved Levers:** *Lever 5: Reimagine, Lever 6: Align*

*TNTP believes our nation's public schools can offer all children an excellent education. A national nonprofit founded by teachers, we help school systems end educational inequality and achieve their goals for students. We work at every level of the public education system to attract and train talented teachers and school leaders, ensure rigorous and engaging classrooms, and create environments that prioritize great teaching and accelerate student learning. Since 1997, we've partnered with more than 200 public school districts, charter school networks and state departments of education. We have recruited or trained more than 50,000 teachers, redefined critical education issues through acclaimed studies like *The Widget Effect* (2009) and *The Mirage* (2015), and launched one of the nation's premiere awards for excellent teaching, the Fishman Prize for Superlative Classroom Practice. Today, TNTP is active in more than 30 cities. [tntp.org](http://tntp.org)*

## Relevant Experience

### Key Experiences

- Helped more than 200 districts design sustainable solutions for teacher talent
- Developed a suite of diagnostic tools to assess and understand schools' academic, talent, and instructional culture needs that provide schools and LEAs with a picture of strengths, challenges, and opportunities and lead to recommendations for improvements and for ongoing monitoring of the talent and school support landscape.
- Designed and implemented school supports – either directly or in partnership with other support organizations – to help districts set clear academic priorities and sound strategies for engaging families and key community stakeholders, which is necessary to attract, develop, and retain strong teachers and leaders.
- Designed and implemented – directly or in partnership with other pipeline programs – recommendations for the recruitment, selection, and hiring systems, processes, and practices
- Case Study - Working alongside Empower Schools, TNTP created a unified strategy for multiple districts and CMOs in Western Massachusetts to produce a more reliable pipeline of high-quality teachers. Our approach started with the design and execution of an aggressive recruitment campaign that included advising the district on creating and launching their brand, and launching the Teach Western Mass website. We also provided strategic advisory to the district – developing a talent collaborative working group and steering committee, and providing district-specific support in Holyoke and Springfield. In just one year, Holyoke Public Schools dramatically improved their hiring timeline and filled nearly 90% of all vacancies by August 1<sup>st</sup> – the prior year, a majority of vacancies had been filled in August or September.

## Key Staff

### Crystal Harmon, Executive Vice President

- Executive Vice President, TNTP, 2016-present
  - Oversees one-half of TNTP's portfolio—approximately 50 active projects
  - Leads TNTP's efforts supporting partners to design and implement Portfolio Strategy, including partnerships with Camden City School District to implement the district's vision for an improved system of schools and redesign central office and with Detroit Public Schools to help the district reorganize with an emphasis on empowering local leaders
- Vice President, TNTP, 2011-2016
  - Responsible for the oversight and success of Strategies & Operations and Performance Management departments
- Partner and Chief of Staff, TNTP, 2007-2011
  - Spearheaded local strategies to build awareness of new reforms, created political pressure for contractual, regulatory and legislative reform, and ensure effective follow-through.

- Advised districts on effective human capital strategies for hiring, evaluating, developing, and retaining a teaching force that can improve student achievement and close the achievement gap.

#### **Lesley Guggenheim, Vice President**

- Vice President, TNTP, 2013-present
  - Lead development and implementation of new teacher pipeline solutions
  - Oversee the organization's teacher and leader recruitment and selection services
- Partner, TNTP, 2008-2013
  - Managed the success of a portfolio of contracts with states and/or school districts focused on recruiting, selecting, developing, and retaining great teachers
  - Developed and facilitate the design of innovative new approaches to raise the quality of education for students
- Program Director, NYC Teaching Fellows, 2006-2008
  - Oversaw delivery of approximately 500-1500 alternate route teachers per year to New York City public schools.

#### **Kelvey Oeser, Partner**

- Partner, TNTP, 2013-present
  - Manage a portfolio of contracts focused on recruiting, developing, and retaining great teachers, including directly managing teacher pipeline programs, partnering with districts to set-up grow-your-own programs, consulting with districts on human capital systems, and designing new innovative pathways in partnership with higher education institutions
  - Lead statewide strategy and new partnership development efforts in Texas, including launching new partnerships with Dallas ISD, San Antonio ISD, Midland ISD, and the five demonstration districts in the Raise Your Hand Texas *Raising Blended Learner Initiative*
  - Lead design of organization-wide new teacher coaching model and redesign of TNTP's national teacher preparation training curriculum (*Fast Start*)
- Vice President of Staff Training Design, Teach for America National Team, 2010-2013
  - Led improvements to all nationally designed resources and trainings for TFA's 550+ full-time instructional staff members and 800+ part-time summer staff members,
  - Developed and managed district and school-site partnerships in support of charter pre-service teacher training institute.

# 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

## Bellwether Education Partners:

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

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

### Relevant Experience

#### Richmond Public Schools

- Worked with Richmond Public Schools, the City of Richmond, and community stakeholders to develop a shared understanding of the \$350 million school district budget and identify opportunities to optimize the budget for student success.
- Helped stakeholders understand the city's financial context and revenue and expense drivers for the district, analyzed how the budget compared to that of "peer" districts of similar size and demographics, and translated the findings in a report accessible to the community.
- Created a final report that explained each element of the budget and offered specific ideas and considerations around both short-term and long-term decisions (e.g., facilities planning) that the district and the city were considering.

#### San Francisco Unified School District

- Worked with stakeholders across the district to identify high-priority strategic initiatives for the next five years and how they might be implemented.
- Advised the SFUSD's chief of staff on the design and launch of an investment infrastructure to support implementation of these priorities, as well as the overall 2025 vision, with extensive support from the community.
- Developed a "Digital District Plan" informed by best practices from other districts.

#### Cleveland Metropolitan School District

- Drove a robust change management program that included widespread stakeholder analysis to understand the diverse perspectives, needs, fears, and motivations of staff across the district.
- Created and facilitated a design team made up of a cross-section of district staff to help shape the redesign, share key messages with impacted staff throughout the process, and embed expert support within the organization for the variety of coordinated vehicles.
- Created and implemented a series of trainings and management capacity-building workshops, discussion groups, and coaching sessions to enable staff to successfully implement the new system and adopt new behaviors.

### Key Staff

#### Mary Kroupa Wells, Co-Founder & Managing Partner

- Bellwether Education Partners, 2008-Present
  - Co-founded and lead national non-profit whose mission is to help education organizations become more effective and achieve dramatic results, especially for underserved students. Manage budget of over \$11M and staff of over 50.
  - Provide strategic planning and implementation support to a wide variety of education organizations, with a focus on school systems, human capital providers and entrepreneurs.
  - Redesigned the business model with an alternative teacher preparation program to enhance the financial sustainability of the organization while improving the participant value proposition.

- Supported large district to build out personalized learning strategy, including identifying central systems and supports and process to support the creation of cohorts of innovative pilot schools.
  - Supported several entrepreneurs in building out initial business plans to support the launch of new ventures and provided executive advisory support during the startup phase.
- Senior Program Officer, Communities Foundation of Texas, 2004-2007
  - Designed and managed secondary education reform initiative to transform science, technology, engineering, and mathematics (STEM) education in Texas.
  - Led the design and implementation of grant support programs to ensure quality and consistency of results.

#### **Lina Bankert, Partner**

- Bellwether Education Partners, 2012-Present
  - Organizational/issue area expertise: districts, charter management organizations, foundations, teacher and leader effectiveness, college access and persistence
  - Capability expertise: strategic planning, business plan development, growth and expansion strategy, human capital and organizational design, performance improvement and sustainability, and grant development and implementation
- Consultant, Manager, & Principal, Bain & Company, 2005-2012
  - Led work with executive teams across a broad range of industries and capabilities in both the private and public sectors
  - Led final design and startup of a K-8 charter school in Chicago

#### **Katie Vivalo Rouse, Associate Partner**

- Bellwether Education Partners, 2017-Present
  - Member of Strategic Advising leadership team; Manages project teams to deliver high impact strategies and plans to support strategic growth and expansion; organizational design and effectiveness; and performance improvement.
  - Clients served include charter management organizations, districts, education nonprofits and entrepreneurs.
- Chief Operating Officer, DC Prep, 2013-2016
  - Implemented first ever transparent internal role transition and promotion process providing opportunity for teachers and leaders to apply for vacant roles.
  - Led team to hire for over 100 roles annually using improved data tracking, rubrics, screening tools and processes.
  - Managed operations across five campuses and home office including launching a new campus.
  - Developed human resources function to support growing organization including moving paper processes to electronic, writing and updating policies to support employees and training managers on policy and management.
- Broad Resident, Chicago Public Schools, 2011-2013
  - Led consulting and internal teams to develop first draft of educational master facilities plan.
  - Led labor relations team to analyze financial impact of proposed policies
  - Organized first annual back-to-school leadership development event for 1,700 teacher and parents.



## 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 mid-sized 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

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

### Key Staff

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

## 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

## TNTP:

**Other Approved Levers:** *Lever 4: Build, Lever 6: Align*

*TNTP believes our nation's public schools can offer all children an excellent education. A national nonprofit founded by teachers, we help school systems end educational inequality and achieve their goals for students. We work at every level of the public education system to attract and train talented teachers and school leaders, ensure rigorous and engaging classrooms, and create environments that prioritize great teaching and accelerate student learning. Since 1997, we've partnered with more than 200 public school districts, charter school networks and state departments of education. We have recruited or trained more than 50,000 teachers, redefined critical education issues through acclaimed studies like *The Widget Effect* (2009) and *The Mirage* (2015), and launched one of the nation's premiere awards for excellent teaching, the Fishman Prize for Superlative Classroom Practice. Today, TNTP is active in more than 30 cities. [tntp.org](http://tntp.org)*

## Relevant Experience

### Key Experiences

- Supported large urban districts, including Camden City Schools and Detroit Public Schools, with large scale central office transformation and restructuring initiatives to meet the needs of their shifts toward portfolio and more autonomous models.
- Currently supporting a medium-sized, Midwestern CMO (that operates a portfolio of schools) to define a new strategy, develop school autonomy provisions, and design a central organizational structure to accomplish their goals.
- Created central services pricing menus and processes for schools to purchase services from central office.
- Case Study - In 2013, after decades of declining enrollment, low performance, and faced with a \$75M deficit, Camden City School District (CCSD) partnered with TNTP and Parthenon-EY to transform CCSD according the district's strategic plan and support the district in bringing high-quality schools to Camden. We supported the district in designing and implementing a vision for an improved system of schools and a central office that could better support a diverse portfolio of schools. Our work including developing a 5-year strategic plan, redesigning the CCSD central office and creating or reimagining several smaller offices, and overhauling the district's budget. We also supported the district in developing and implementing new and more efficient school-based staffing processes and practices. On July 1, 2014 the new central office launched with 219 positions at a cost of \$13,301,206 – representing a 42% reduction in positions and 34% reduction in personnel cost.

## Key Staff

### Crystal Harmon, Executive Vice President

- Executive Vice President, TNTP, 2016-present
  - Oversees one-half of TNTP's portfolio—approximately 50 active projects
  - Leads TNTP's efforts supporting partners to design and implement Portfolio Strategy, including partnerships with Camden City School District to implement the district's vision for an improved system of schools and a central office designed and with Detroit Public Schools to help the district reorganize with an emphasis on empowering local leaders
- Vice President, TNTP, 2011-2016
  - Responsible for the oversight and success of Strategies & Operations and Performance Management departments
- Partner and Chief of Staff, TNTP, 2007-2011
  - Spearheaded local strategies to build awareness of new reforms, created political pressure for contractual, regulatory and legislative reform, and ensure effective follow-through.
  - Advised districts on effective human capital strategies for hiring, evaluating, developing, and retaining a teaching force that can improve student achievement and close the achievement gap.

### Lesley Guggenheim, Vice President

- Vice President, TNTP, 2013-present
  - Lead development and implementation of new teacher pipeline solutions
  - Oversee the organization's teacher and leader recruitment and selection services
- Partner, TNTP, 2008-2013
  - Managed the success of a portfolio of contracts with states and/or school districts focused on recruiting, selecting, developing, and retaining great teachers
  - Developed and facilitate the design of innovative new approaches to raise the quality of education for students
- Program Director, NYC Teaching Fellows, 2006-2008
  - Oversaw delivery of approximately 500-1500 alternate route teachers per year to New York City public schools.

### Kelvey Oeser, Partner

- Partner, TNTP, 2013-present
  - Manage a portfolio of contracts focused on recruiting, developing, and retaining great teachers, including directly managing teacher pipeline programs, partnering with districts to set-up grow-your-own programs, consulting with districts on human capital systems, and designing new innovative pathways in partnership with higher education institutions
  - Lead statewide strategy and new partnership development efforts in Texas, including launching new partnerships with Dallas ISD, San Antonio ISD, Midland ISD, and the five demonstration districts in the Raise Your Hand Texas *Raising Blended Learner Initiative*
  - Lead design of organization-wide new teacher coaching model and redesign of TNTP's national teacher preparation training curriculum (*Fast Start*)
- Vice President of Staff Training Design, Teach for America National Team, 2010-2013
  - Led improvements to all nationally designed resources and trainings for TFA's 550+ full-time instructional staff members and 800+ part-time summer staff members,
  - Developed and managed district and school-site partnerships in support of charter pre-service teacher training institute.



## LEVER 6: ALIGN CIVIC PARTNERS AND ENGAGE THE COMMUNITY

### Bellwether Education Partners:

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

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

### Relevant Experience

Rhode Island Department of Education and New Haven Public Schools
<ul style="list-style-type: none"><li>Helped with development of the successful Race to the Top application for the Rhode Island Department of Education (RIDE) and for New Haven Public Schools (NHPS).</li><li>Provided comprehensive assistance including planning and support for stakeholder engagement across a wide array of constituencies: leadership cabinet, staff, elected officials, unions, teachers, principals, community groups, parents, and students.</li><li>Helped RIDE and NHPS create a calendar and a plan for engagement, developed materials for and attend meetings, and ensured that recommendations coming out of those conversations were incorporated into the applications.</li></ul>
Accelerate Great Schools Cincinnati
<ul style="list-style-type: none"><li>Wrote a five-year business plan for a new city-based intermediary to support the creation of 15,000 high-performing seats in district, charter, and Catholic schools over the next 10 years.</li><li>Built a fact-based understanding of how other city intermediaries approach quality seat creation and developed a detailed understanding of the existing Cincinnati landscape, including current gaps in high-quality education options.</li><li>Analyzed data on educational achievement gaps, developed a model to calculate the current need for and supply of high-performing school seats, projected a rollout and expansion pathway to build supply to meet unmet needs, and developed a financial model for the Accelerator.</li><li>Helped craft the new organization's mission, goals, and five-year organizational priorities, and developed a staffing plan, governance model, and financial model to support the successful implementation of those priorities.</li></ul>

### Key Staff

Mary Kroupa Wells, Co-Founder & Managing Partner
<ul style="list-style-type: none"><li>Bellwether Education Partners, 2008-Present<ul style="list-style-type: none"><li>Co-founded and lead national non-profit whose mission is to help education organizations become more effective and achieve dramatic results, especially for underserved students. Manage budget of over \$11M and staff of over 50.</li><li>Provide strategic planning and implementation support to a wide variety of education organizations, with a focus on school systems, human capital providers and entrepreneurs.</li><li>Redesigned the business model with an alternative teacher preparation program to enhance the financial sustainability of the organization while improving the participant value proposition.</li><li>Supported large district to build out personalized learning strategy, including identifying central systems and supports and process to support the creation of cohorts of innovative pilot schools.</li><li>Supported several entrepreneurs in building out initial business plans to support the launch of new ventures and provided executive advisory support during the startup phase.</li></ul></li></ul>

- Senior Program Officer, Communities Foundation of Texas, 2004-2007
  - Designed and managed secondary education reform initiative to transform science, technology, engineering, and mathematics (STEM) education in Texas.
  - Led the design and implementation of grant support programs to ensure quality and consistency of results.

#### **Lina Bankert, Partner**

- Bellwether Education Partners, 2012-Present
  - Organizational/issue area expertise: districts, charter management organizations, foundations, teacher and leader effectiveness, college access and persistence
  - Capability expertise: strategic planning, business plan development, growth and expansion strategy, human capital and organizational design, performance improvement and sustainability, and grant development and implementation
- Consultant, Manager, & Principal, Bain & Company, 2005-2012
  - Led work with executive teams across a broad range of industries and capabilities in both the private and public sectors
  - Led final design and startup of a K-8 charter school in Chicago

#### **Katie Vivalo Rouse, Associate Partner**

- Bellwether Education Partners, 2017-Present
  - Member of Strategic Advising leadership team; Manages project teams to deliver high impact strategies and plans to support strategic growth and expansion; organizational design and effectiveness; and performance improvement.
  - Clients served include charter management organizations, districts, education nonprofits and entrepreneurs.
- Chief Operating Officer, DC Prep, 2013-2016
  - Implemented first ever transparent internal role transition and promotion process providing opportunity for teachers and leaders to apply for vacant roles.
  - Led team to hire for over 100 roles annually using improved data tracking, rubrics, screening tools and processes.
  - Managed operations across five campuses and home office including launching a new campus.
  - Developed human resources function to support growing organization including moving paper processes to electronic, writing and updating policies to support employees and training managers on policy and management.
- Broad Resident, Chicago Public Schools, 2011-2013
  - Led consulting and internal teams to develop first draft of educational master facilities plan.
  - Led labor relations team to analyze financial impact of proposed policies
  - Organized first annual back-to-school leadership development event for 1,700 teacher and parents.

## 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

- 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

<b>Brenna Copeland, Founder &amp; CEO</b>
<p>Founder &amp; CEO, EdPlex - School Restart Work 2015-present</p> <ul style="list-style-type: none"><li>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 <a href="http://www.schoolrestarts.org">www.schoolrestarts.org</a>)</li><li>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)</li></ul> <p>Executive Director of Portfolio Management, Denver Public Schools, 2011-2015</p> <ul style="list-style-type: none"><li>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</li></ul>
<b>Marissa Ferrari, Consultant</b>
<p>Director of Marketing, Denver Public Schools, 2009-2014</p> <ul style="list-style-type: none"><li>Helping families understand and navigate their school and program choices</li><li>Developed and implemented district-wide, regional, and school-specific communications aimed at helping families assess school performance, programs, culture, and other indicators of quality.</li><li>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.</li></ul>
<b>Rebecca Grant Zarret, Consultant</b>
<p>Education Consultant, 2014-present</p> <ul style="list-style-type: none"><li>Developed communications collateral to support school turnaround efforts and related processes (FWISD, AISD, Oakland Unified School District).</li></ul> <p>Director of School Turnaround &amp; School Improvement Initiatives, Denver Public Schools, 2009-2015</p> <ul style="list-style-type: none"><li>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)</li></ul> <p>Special Assistant to the Superintendent, Austin ISD, 2009</p> <p>Executive Intern to the Superintendent, Fort Worth ISD, 2008-2009</p>
<b>Shannon Fitzgerald, Consultant</b>

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

## Key Staff

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

## TNTP:

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

*TNTP believes our nation's public schools can offer all children an excellent education. A national nonprofit founded by teachers, we help school systems end educational inequality and achieve their goals for students. We work at every level of the public education system to attract and train talented teachers and school leaders, ensure rigorous and engaging classrooms, and create environments that prioritize great teaching and accelerate student learning. Since 1997, we've partnered with more than 200 public school districts, charter school networks and state departments of education. We have recruited or trained more than 50,000 teachers, redefined critical education issues through acclaimed studies like *The Widget Effect* (2009) and *The Mirage* (2015), and launched one of the nation's premiere awards for excellent teaching, the Fishman Prize for Superlative Classroom Practice. Today, TNTP is active in more than 30 cities. [tntp.org](http://tntp.org)*

## Relevant Experience

### Key Experiences

- Developed the Community Engagement Compass, a diagnostic tool that allows districts to gain a clear picture of their unique community context, quickly identify opportunities for proactive communications and engagement, and proactively address any potential challenges
- Supported districts to develop and implement holistic communications and community engagement plans that include specific goals, strategies, and tactics on both short-term and long-term priorities
- Provided support on family and community engagement to Houston Independent School District, San Antonio Independent School District, the Bureau of Indian Education, and the Springfield Empowerment Zone in MA, leading to the creation of new resources and structures to support internal and external engagement, the ongoing implementation of family and student surveys, and systematic efforts to educate and engage parents and external stakeholders on important district priorities (e.g. changes in student enrollment and efforts to improve struggling schools).

## Key Staff

### Crystal Harmon, Executive Vice President

- Executive Vice President, TNTP, 2016-present
  - Oversees one-half of TNTP's portfolio—approximately 50 active projects
  - Leads TNTP's efforts supporting partners to design and implement Portfolio Strategy, including partnerships with Camden City School District to implement the district's vision for an improved system of schools and a central office designed and with Detroit Public Schools to help the district reorganize with an emphasis on empowering local leaders
- Vice President, TNTP, 2011-2016
  - Responsible for the oversight and success of Strategies & Operations and Performance Management departments
- Partner and Chief of Staff, TNTP, 2007-2011
  - Spearheaded local strategies to build awareness of new reforms, created political pressure for contractual, regulatory and legislative reform, and ensure effective follow-through.
  - Advised districts on effective human capital strategies for hiring, evaluating, developing, and retaining a teaching force that can improve student achievement and close the achievement gap.

### Kenya Nicole Bradshaw, Vice President



- Vice President, TNTP, 2013-present
  - Developed and leads TNTP's community engagement strategy and community engagement department
  - Consults on education contracts with public school districts, including Houston Independent School District, Shelby County Schools, Oakland Unified School District, and Durham Public Schools, on community engagement, strategic human resources, and academic priorities
  - Managed TNTP's Foundations contract with the Houston Independent School District dedicated to improving teacher effectiveness through recruitment, development, compensation, appraisal, and differential retention
- Tennessee Executive Director, Stand for Children, 2009-2013
  - Developed and implemented Stand for Children's Tennessee community re-entry and expansion plan
  - Created Education Study Circles curriculum to educate community about education reform initiatives
  - Formed and led community-based advocacy teams across racial, occupational, and geographic lines
  - Coordinated advocacy campaigns around education reform issues, including: a school funding campaign resulting in an \$86-million-dollar increase in K-12 funding, passage of voluntary Pre-K, seven successful school board races, and the passage of five ballot measures
- Community Planning and Development Specialist, The Urban Child Institute, 2006-2009
  - Cultivated and developed relationships with policymakers, child care providers, early childhood educators, and community groups for the purpose of facilitating and implementing the organization's strategic plan
  - Planned, facilitated, and implemented strategies to increase the number of NAEYC accredited Pre-K centers from three to 23 in three years
  - Developed and implemented "First Years Last a Lifetime" and "Touch, Talk, Read, and Play" campaign that resulted in a 35% increase in community knowledge of early brain development.