PROPOSAL FORM: Strategic Planning Facilitation

1. **Respondent Information-Corporate**

Name:	Scott Joftus
Address:	8610 Ridge Rd.
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2. **Primary Contact Person Information (please provide other contact information on a separate sheet as deemed necessary)**

Name:	Scott Joftus
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Fax Number	

3. **Authorization**

Signature	
Date	07/08/2021
Title	President

4. **Check if you have included the required proposal copies**

X	Two (2) paper copies of the proposal including pricing
X	One (1) electronic copy of the proposal on a flash drive

6. **Attach a list of references per Instructions to Respondents.**

7. **Summary of what differentiates your services and products from others.**

8. **Please provide a detailed description of how your proposed solution meets or exceeds the criteria detailed in the Scope of Service. Please provide responses in the order they appear in the Scope of Service.**

Return by July 12, 2021, at 12:00 p.m.:

> Raytown C-2 School District
> Attn: Dr. Allan Markley
> Raytown Quality Schools Administration Building
> 6608 Raytown Road,
> Raytown, MO 64133

Proposal for Strategic Planning Facilitation

Submitted to Raytown Quality Schools

July 9, 2021

Submitted by:
Dr. Scott Joftus, President
Scott@FourPointEducation.com
301-524-2603

Dr. Allan Markley
Superintendent of Schools
Raytown C-2 School District
6608 Raytown Rd.
Raytown, MO 64133

Dear Dr. Markley:

On behalf of FourPoint Education Partners, I am pleased to submit this proposal to Raytown Quality Schools (RQS) to help facilitate strategic planning for the district. FourPoint has been dedicated to supporting education leaders achieve outstanding results for all students since 2004 and brings unmatched organizational experience in helping LEAs engage community, assess needs, and plan strategically. We have done so with a number of districts, including three recent clients—Bensalem Township (PA), Champaign (IL), and Alexandria City (VA) during the pandemic. In all of these districts, we have provided additional supports including training to become an anti-racist organization and technical assistance related to change and performance management. In addition, FourPoint was recently selected by the Texas Education Agency to provide strategic planning services to Texas districts receiving a State grant to lengthen their school year and restructure their school day, and we recently completed support two districts— San Marcos ISD and Alief ISD.

FourPoint has a high-quality approach and strong project management plan to ensure that we meet an agreed-upon timeline, and that RQS and its stakeholders receive a strategic plan that will enable the district to significantly improve outcomes of all students. Our intense focus on equity also involves using creative means to engage stakeholders and to addressing the interests and concerns of all stakeholders in RQS. Finally, since our experience extends beyond strategic planning, FourPoint is able to support RQS in implementing the newly created strategic plan through leadership coaching, performance management, systems development and change, and anti-racism training.

We look forward to discussing our proposal with you and to the prospect of serving the RQS community.

Sincerely,

Scott Joftus, Ed.D.
Co-Founder and President

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Approach and Scope of Work

One of FourPoint's most common consulting services is working with districts to assess their strengths and needs and using the results from the assessment to inform the development of a strategic plan focused on eliminating opportunity gaps for low-income students, students of color, English language learners, and students with disabilities. To support RQS, FourPoint will adapt the methodologies used successfully in our engagements with districts and states as diverse as Omaha and Grand Island (NE), Fayette County (KY), Jersey City (NJ), Hartford (CT), Champaign (IL), and Alexandria City (VA). These methodologies have been designed and shown both to collect the information necessary to complete a high-quality strategic plan and to engage stakeholders from across the district, ensuring that they feel that their perspectives have been represented.

FourPoint's project plan addresses RQS' scope of services as outlined in the RFP (see Box to right) through four phases outlined below.

Phase 1. Planning, Communication, Project Management (Fall 2021)

> ### Scope of Services as Outlined in RQS RFP
>
> Work with the Citizens' Advisory Committee and others as directed by the Superintendent
>
> Planning and Communication
> - Work with RQS to design the overall strategic planning process resulting in a "1 and 5 plan"
> - Design a robust and inclusive student, community, and staff engagement process to maximize stakeholder input, including in-person meetings, online feedback tools, and other effective modes
> - Engage with Supe, leadership team, and Board
> - Assist in development of communications materials
>
> Information Gathering and Synthesis
> - Review pertinent RQS data and programs
> - Comply with confidentiality requirements
> - Present research and best practices to inform the plan
> - Synthesize and identify themes from feedback, data review, and research
>
> Plan Formation
> - Facilitate the CAC in development of strategic plan
>
> Implementation
> - Facilitate CAC in development of implementation plan

Within two weeks of contract signing, FourPoint will meet virtually with the main point of contact/project manager at RQS to address questions related to project management across all phases of the project and to customize our process to align with the district's specific needs. Questions to be addressed include:

Questions about Phase 1: Planning, Communication, and Management of the Process
- What, if any, changes to the project timeline (see Proposed Project Timeline, below) are needed?
- What plans need to be made in case Covid-19 requires schools to be closed? Which interviews
- How frequently and in what ways should RQS and FourPoint communicate about the project's status?

Questions about Phase 2: Information Gathering and Synthesis
- What data and information will RQS provide to FourPoint, and in what format?
- Who at RQS will be responsible for helping FourPoint set up meetings with stakeholders, administer surveys, and conduct classroom observations?
- How can RQS and FourPoint ensure that stakeholders from all geographic regions of the district participate and feel that their participation was authentic?
- How do we ensure that the community engagement is transparent and inclusive?

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Questions about Phase 3: Plan Formation
- How do we ensure the strategic planning process is transparent and inclusive?
- How can RQS and FourPoint ensure that stakeholders from all geographic regions of the district participate and feel that their participation was authentic?
- Should any board members serve on the strategic planning committee? Who else will participate?[1]
- How do we ensure that the final strategic plan promotes equity and excellence?
- Is there general agreement about what the final strategic plan will look like?[2]
- In what ways should the draft plan be communicated and edited based on feedback?

Questions about Phase 4: Implementation
- What is the role of the CAC in implementation planning?
- Does RQS have a preferred technology platform for the monitoring dashboard?
- Who will be involved in developing (with FourPoint) and managing the monitoring system?

Following this meeting, which will take approximately two hours, FourPoint will draft and submit a memo outlining key decisions made, describing the processes for engaging RQS, and detailing the final timeline. FourPoint will also provide a status report to RQS throughout the study on at least a monthly basis.

Phase 2. Information Gathering and Synthesis (Fall 2021)

FourPoint's strategy for collecting data that can inform the strategic plan accomplishes two key objectives. First, it collects the "hard" and perceptual data that enable FourPoint to develop valid and meaningful findings and to propose important goals, objectives, indicators, and strategies for the strategic plan. Second, our process for collecting data was designed to ensure engagement of all stakeholders, ensuring that they feel they were heard—whether or not they agree with specific strategies going forward. We have seen this to be true in places as diverse as Omaha (NE), Jersey City (NJ), Hartford (CT), rural and urban Kansas, and Alexandria City (VA): This buy-in is critical if the district hopes to drive sustained improvements in school quality and student outcomes.

FourPoint uses a variety of methodologies—including extant data and document analysis, online surveys, and interviews and focus groups with a wide range of stakeholders—to assess the systemic coherence of the district. Systemic coherence means that the policies and practices of the district "work together in an integrated way to implement an articulated strategy."[3] FourPoint applies this framework through six overarching questions, which will guide data collection and stakeholder engagement:

> FourPoint assesses systemic coherence to ensure that all students—especially children of color, English language learners, and students with disabilities—are given the instruction and supports needed to succeed.

1) What are the district's student outcomes and goals?
2) What is the district's overarching theory for improving the quality of its schools and the outcomes of its students?
3) Is that theory consistent with stakeholder belief systems and current student outcomes and

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[1] FourPoint recommends a group no larger than 15 people.
[2] FourPoint will provide sample products for discussion purposes.
[3] Childress, S., R. Elmore, A. Grossman, and C. King (January 2007). *Note on the PELP Coherence Framework*. Public Education Leadership Project at Harvard University.

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demographics?

4) Do the district's policies and practices reflect its theory of change?
5) Are district practices—in each of the domains defined by RQS and FourPoint (see below)—effective?
6) How can the district best support the needs of the community, schools, and students and families?

In addition to these overarching research questions, FourPoint will draft more domain-specific research questions based on our work in the planning phase. For example, domains that FourPoint typically studies include curriculum and assessment, instruction, special populations (typically SPED and ELL), school improvement planning and implementation, human resources, finance, organizational structure, school governance, and operations. We will work with RQS to define up to five specific domains of interest.[4] Rather than examine equity as a separate domain, FourPoint uses the lens of equity to study all domains and in making recommendations in the final report. See Figure 1 for the domains and research questions recently addressed by FourPoint for another district client.

Figure 1. Domains and Research Questions Guiding the Reviews of a Recent FourPoint Client

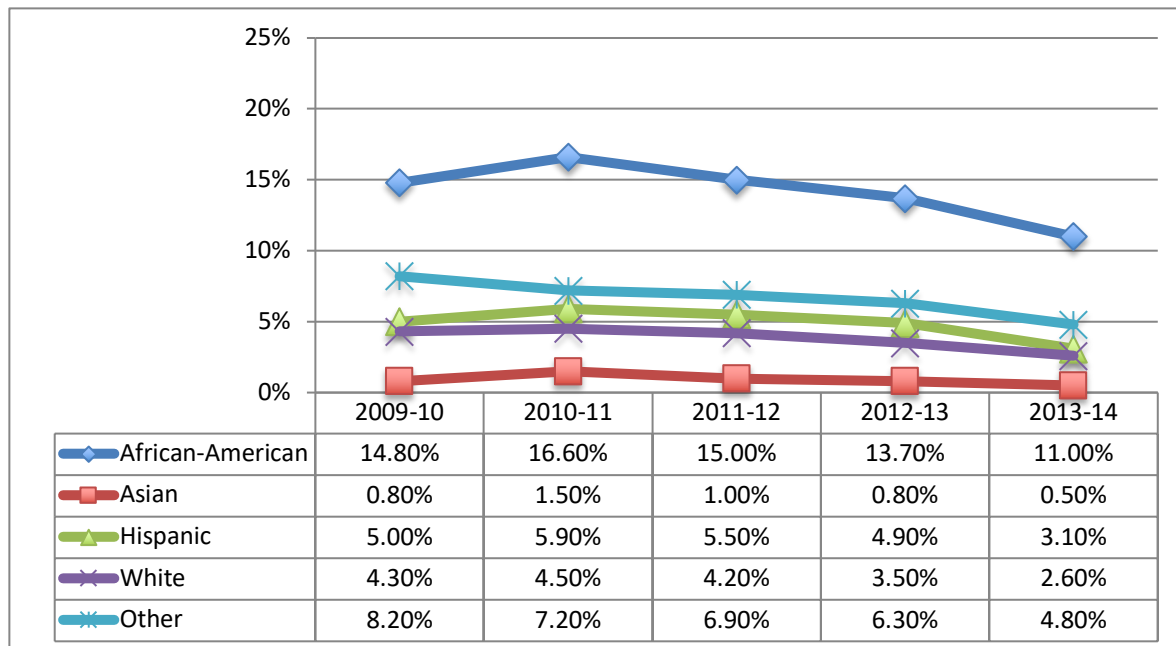| Domain	Research Questions
Vision, Strategy, Culture, and Structure	• What is the district's overall vision? • What is the district's theory of action (TOA)? • What is the district's main set of strategies for improvement? • How well are the vision, TOA, and strategies aligned and understood by stakeholders? • How do stakeholders describe district and school culture? • To what extent do the district's organizational structure and board policies enable/slow implementation of its strategies for improvement?
Finance	• To what extent are resources equitably distributed to schools? • Are budgeting and allocation processes transparent? • What are the greatest funding challenges facing the district, and how can they best be addressed?
Academics	• What curriculum and instructional resources are used by the district? • How effectively is the curriculum taught and assessed? • To what extent are research-based instructional strategies taught (professional development), supported (coaching), and monitored (classroom observations and PLCs)? • To what extent is response to intervention used in schools?
Special Populations	• How and how effectively do schools support students struggling to meet academic standards, including students with disabilities and English language learners? • To what extent is the district facing any compliance issues? • What models are used to ensure that all students meet grade-level standards? • To what extent do educators and administrators use best practices to support students?
Data Accountability, Research, Evaluation	• What data are made available to administrators and teachers to shape instruction? • To what extent do teachers and administrators make use of available data to improve instruction and supports for students? • How does the district hold schools accountable for improvement? • To what extent does the district evaluate school and district initiatives and use findings as part of a continuous improvement process?

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[4] If the district wishes, additional domains (e.g., Operations, HR) can be added, but the budget will need to be increased.

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Domain	Research Questions
School Management	• What are the characteristics and challenges of schools across the district? Of those identified as needing to improve? • How much autonomy do schools have? Is this well understood by key stakeholders? • What is the district's strategy for school improvement? To what extent is this strategy consistent with the district's goals and theory of action and implemented?

The overarching research questions and issue-specific questions will then be addressed using the following methodologies. Although our plan and budget assume an in-person site visit (four days with four consultants), most of these methods—with the exception of classroom observations—can be conducted virtually if Covid-19 requires it.

- **Extant Data and Document Analysis.** FourPoint will review existing planning and assessment documents (including current strategic plan, vision and mission, and current success plan and implementation plan required for submission the Department of Education). Data will include a variety of student outcomes but might also highlight—for example—schools that are performing better than expected (given their student demographics), schools that are experiencing teacher or administrator shortages in specific areas, and schools that have particular programs of interest (e.g., AP, IB, CTE, etc.). Information will include key policies related to school and district improvement. Figure 2 provides an example of part of the analysis FourPoint recently conducted for a district.

Figure 2. Partial Extant Data Analysis from a Recent FourPoint Client: Percentage of District Students Suspended, by Race and Year

	2009-10	2010-11	2011-12	2012-13	2013-14
African-American	14.80%	16.60%	15.00%	13.70%	11.00%
Asian	0.80%	1.50%	1.00%	0.80%	0.50%
Hispanic	5.00%	5.90%	5.50%	4.90%	3.10%
White	4.30%	4.50%	4.20%	3.50%	2.60%
Other	8.20%	7.20%	6.90%	6.30%	4.80%

- **Web-based Teacher and Principal Surveys**. FourPoint uses online surveys in all of our district reviews. These surveys ask for teacher and principal feedback on a number of important domains, including curriculum and instruction, school improvement, special

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populations (students with disabilities and ELLs), instructional strategies, tiered interventions, human capital, professional development, and central services. Before coming on site, FourPoint will provide draft surveys of teachers and principals to the district for review and feedback. Once approved, FourPoint will send the Survey Monkey links of the surveys to the district along with suggested text for two emails—one to all teachers in the district and one to all principals. We ask that the district send the email, as we have found that teachers and principals will be more likely to respond to the survey. Typically, the survey is sent prior to our site visit but not closed until after our visit, as we can remind teachers and principals to complete the survey while we are on site.

Figure 3 provides an example of some of the survey results FourPoint recently included in a needs assessment report for a district client. The report included many similar tables to summarize all of the survey data collected.

Figure 3. Partial Principal and Teacher Survey Results from a Recent FourPoint Client

	Principals - Strongly Agree/ Agree	Teachers - Strongly Agree/ Agree
Educators use strategies to promote student engagement.	92%	88%
Educators communicate content standards and objectives/learning goals for lessons.	90%	91%
Educators regularly check for understanding to assess and inform instruction.	87%	89%
Educators use strategies that accelerate learning (e.g., homework practice opportunities, cooperative learning, etc.)	84%	82%
Educators use think-aloud strategies.	64%	71%

- **Interviews, Focus Groups, and Listening Sessions**. Based on our conversations during the planning phase, FourPoint will submit a list of recommended individuals and stakeholder groups to interview or include in focus groups. In general, we will want to interview up to 5 high-profile individuals (e.g., university presidents, CEOs, religious and civic leaders, etc.) from across the district and conduct a total of approximately 8 focus groups representing the following stakeholder groups: parents, district leaders, principals, teachers, high school students, civic leaders, business leaders, and religious leaders.

- **Classroom Observations**. Classroom observations are a key part of many of FourPoint's reviews. Observing classrooms is critical to understanding the extent to which outstanding instruction is being delivered equitably across the district. During our site visit, one analyst who is an instructional expert will conduct a total of approximately 50 classroom observations using FourPoint's Focused Classroom Walkthrough tool. As with the interviews and focus groups, FourPoint's program manager will provide the district a template for planning the visit. The observations are intended to support the analysis of the school and instructional improvement as well as the extent to which research-based instructional strategies are used in the district (complementing the information and data obtained through the online principal and teacher surveys and the interviews and focus groups).

Figure 4 provides an example classroom observation results FourPoint recently included in a needs assessment report for a district client. The report included many similar graphs to summarize all the observation data collected.

Figure 4. Partial Classroom Observation Results from a Recent FourPoint Client
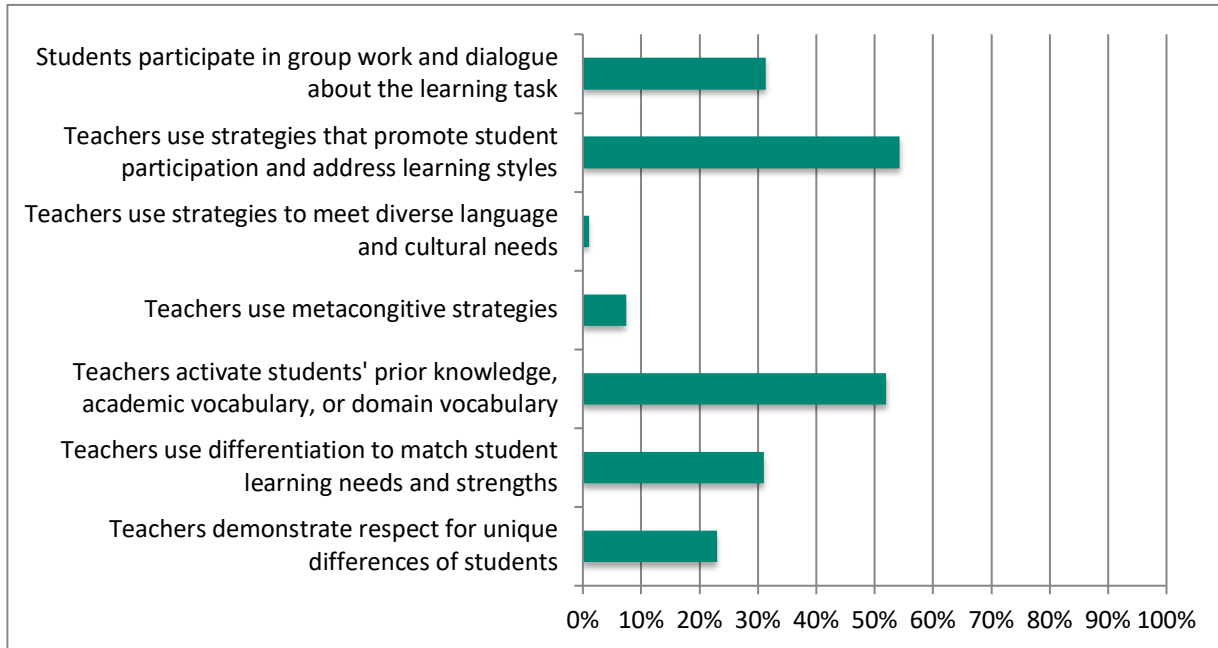
Once all data are collected and analyzed, FourPoint will submit a draft report in Microsoft Word to RQS After incorporating feedback, we will submit the final report in Word and present to stakeholders using PowerPoint.

The final report of the needs assessment will include the following:

- Introduction and context of the work
- Summary of the methodology
- Findings of school and district strengths and challenges supported by data and with comparisons to comparable city and school district efforts to achieve systemic, sustained, and measurable progress toward non-remediation college readiness and skill-based career readiness
- Recommendations that address the findings and include strategies for improving outcomes for all children in the district.

Phase 3. Draft and Present Strategic Plan (Winter 2021-22)

Once the needs assessment is complete, FourPoint will develop a results-based plan based on identified areas highlighted by stakeholders, and we will author the report with the guidance and assistance of the CAC. To begin, FourPoint will meet with the school board and two teams to develop the strategic plan (Figure 5).

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Figure 5. Facilitation Process for Developing RCS Strategic Plan

Meeting Group	Focus Areas and Description
The School Board will meet 4 times.	• At the beginning of the planning process to begin work on the district's vision, mission, and core values. • Soon after the first meeting to finalize vision, mission, and core values. • Toward the end of the planning process to review and provide feedback on the draft strategic plan. • At the end of the planning process to approve the final plan and discuss monitoring and next steps.
A high-level advisory group (Citizens' Advisory Group?)—comprising district and community leaders—will meet twice.	• At the beginning of the planning process to learn about the findings and recommendations from the needs assessment and provide guidance on vision, mission, and strategic goals. • At the end of the project to review a draft of the completed strategic plan and to determine what, if any, role they will play moving forward for monitoring implementation of the plan. For example, in Omaha, this group continued to meet annually to hear updates from the superintendent and serve as a "critical friend" on strategic plan implementation.
A strategic plan working group (Citizens' Advisory Group?)—comprising district administrators, principals, and teachers will meet three (possibly four) times for 3-4 hours each.	• Meeting 1 will begin with a review of the needs analysis so that team members all start from a similar place of understanding. In addition, a few high-quality plans from other states and districts will be presented so that team members have a clear idea of the product they are being asked to produce. Then, FourPoint will facilitate a process to develop draft vision and mission statements and SMART goals. • Meeting 2 will begin with a review of the work produced by the team in Meeting 1 (and edited and refined by FourPoint). An opportunity will be given to offer changes to the vision and mission statements and SMART goals. Then, FourPoint will facilitate a process to develop draft indicators (how do we know goals are being met?), objectives (defined as process outcomes that will result in achieving the goals), and measures (how do we know the objectives are being met?). • Meeting 3 will begin with a review of the work produced by the team in Meeting 2 (and edited and refined by FourPoint). An opportunity will be given to offer changes to any of the work to date. Then, FourPoint will facilitate a process to develop strategies for accomplishing the objectives. FourPoint will take care to explain the difference between strategies (relatively broad steps that will be taken) and action steps (specific actions that identified individuals will complete by a certain date). Action steps will not be part of the strategic planning process but may be addressed in an optional follow-up phase if the district desires. Following meetings 2 and 3, FourPoint will work with key senior administrators to estimate costs and possible sources of funding for strategy implementation.

FourPoint will then present (virtually) the proposed strategies at a board of education meeting and/or hold a town-hall-style meeting to provide an opportunity for the public to learn about and provide feedback on the proposed strategies.

FourPoint will then complete and submit an edited and professionally laid out draft strategic plan. The plan will include shared vision and mission, goals, objectives, measures, strategies, and theory of action. It will also include evidence of broad community engagement and input, support based on reliable data and educational research, resource development strategies, and initial communication strategies.

A simple, adaptable, and effective process for engaging stakeholders while drafting a bold but realistic plan.

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FourPoint will then present the proposed plan at a public meeting. At the meeting, FourPoint will facilitate small group discussions (rather than having participants speak individually at the meeting) to solicit feedback about the draft plan. Following the meeting, FourPoint will work with RQS leadership to make appropriate changes to the draft plan before finalizing.

Following final approval of the plan, FourPoint will work with RQS leadership to build capacity for effective implementation and monitoring of the plan during Phase 4.

Phase 4. Implementation (Winter 2021-22)

Dashboard design will start with distilling success based on the strategic plan and establish associated short and long term metrics to measure progress and effectiveness. To visualize the work, we will also develop an outcome-based dashboard to track progress against milestones over time. The dashboard will be fully aligned with the strategic plan. The process starts with creating success metric followed by action planning as follows:

Metric Setting: As a final component of the strategic plan, we will create success metrics for each goal. These metrics help RQS track the implementation of selected strategies and the progress made toward goals. Each goal will have an outcome metric as well as shorter cycle metrics to assess the fidelity of strategic implementation.

Action Planning: Action planning serves as an evolving roadmap for implementing the strategic plan. For each individual activity, the action plan documents the timeline for completing that activity, any metrics that aid in determining whether the activity implementation is on track for completion, and an assignment of ownership for the work using the "RACI" concept. A RACI chart documents who is Responsible, Accountable, Consulted, and Informed for doing the work. As we facilitate this process, we attempt to identify names of individuals, not departments or positions, to better ensure accountability (see Figure 6, for example).

Figure 6. Sample Action Plan

Goal Identifier	Goal language								
Timeline					**RACI**				
Key Activity	**Start Date**	**End Date**	**Metrics**		**Pat Answer**	**Angel Heart**	**Charlie Trotters**	**Frankie Beans**	**Jules Crown**
Example Activity A	7/1	7/15	0/0 complete		C	A	R	R	
Example Activity B	7/3	7/20	Survey score			C	A/R		
Example Activity c	7/16	8/15	# of units		C	A/R	I		R

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Once complete, we will translate metrics and success measures into a dashboard to visualize progress and effectiveness of implementation. The dashboard design will be static and follow principles we have established over 17 years of similar projects: easy for all members to assess, simple for RQS to update independently, and not requiring a psychometrician to explain the views! FourPoint's tech partner has extensive experience building interactive dashboards, scorecards, and data visualizations for a wide range of states and districts, including the South Carolina Department of Education, Portland School District, Cleveland School District, and the Texas Education Agency.

Schedule

Figure 7 outlines the proposed timeline for the project described above. The timeline will be adjusted during our first meeting with RQS.

Figure 7. Proposed Timeline for the Engagement

Activity and Phase	Date
Phase 1: Planning, Communication, and Management	
Talk with district representatives	August 2021
Submit memo outlining decisions, engagement plan, and final timeline	August 2021
Assist in development of communication materials	Aug 2021 & ongoing
Provide status update to district	Regularly
Phase 2: Information Gathering and Synthesis	
Receive initial data and information from district	August 2021
Submit interview and focus group participant recommendations	August 2021
Submit draft surveys to district	August 2021
Finalize survey and help district send out via email	September 2021
Conduct site visit (interviews, focus groups, and classroom observations)	September 2021
Collect extant data and information	September 2021
Analyze data from all sources	October 2021
Submit draft needs assessment (Word)	October 2021
Submit and present final report (PDF and PPT)	November 2021
Phase 3: Strategic Planning	
Hold first and second meeting with board (vision, mission, values)	November 2021
Hold Advisory Group and Working Group Meeting 1	November 2021

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Hold Working Group Meeting 2	November 2021
Hold Advisory Group Meeting 2 and Working Group Meeting 3	November 2021
Revise plan based on district feedback	December 2021
Hold third meeting with board (present draft plan for feedback)	December 2021
Submit final plan incorporating public feedback and present to board	December 2021
Phase 4: Implementation	
Facilitate metric setting meetings	November 2021
Facilitate action planning	December 2021
Develop and engage input on dashboard mock-ups	December 2021
Finalize and handoff dashboard	January 2022

Fees

FourPoint proposes a total project budget of $142,400, which includes all costs related to personnel, travel, incidental expenses, overhead, and layout and design of the final strategic plan. Figure 8 breaks out the budget by project phase (and activities marked with ** in the RFP), and the assumptions that were made in developing the budget follow. Please note that a small discount is provided for each phase if all activities are accepted rather than eliminating select ones.

Figure 8. Proposed Budget by Project Phase and RFP Scope Elements

Phase and Required RFP Elements	Budget
Phase 1: Planning, Communication, and Management Total	**$9,700**
Work with RQS to design overall strategic planning process	$5,300
Assist in development of communication materials	$4,600
Provide status update to district	$1,200
Phase 2: Information Gathering and Synthesis Total	**$42,100**
Review pertinent data and programs and conduct site visit	$30,500
Comply with confidentiality requirements	$0
Present relevant research and best practices to inform plan	$9,000
Synthesize and identify themes from feedback, data review, and research	$5,100
Phase 3: Strategic Planning Total	**$30,900**

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Hold first and second meeting with board (vision, mission, values)	$8,000
Hold Advisory Group and Working Group Meeting 1 (note: one or both of these groups might be the CAC)	$5,800
Hold Working Group Meeting 2	$4,800
Hold Advisory Group Meeting 2 and Working Group Meeting 3	$5,800
Revise plan based on district feedback	$4,200
Hold third meeting with board (present draft plan for feedback)	$4,800
Submit final plan incorporating public feedback and present to board (includes professional layout of the plan)	$5,200
Phase 4: Implementation Total	**$59,700**
Facilitate metric setting meetings with CAC	$21,000
Facilitate action planning with CAC	$16,000
Develop and engage input on dashboard mock-ups	$28,000
Finalize and handoff dashboard	$13,000

The following assumptions were made in developing the budget in Figure 8.

Phase 1
- Two-hour video conference with the project director and project manager to initiate project
- Revision of timeline, establishment of domains to be studied, memo summarizing major decision points from kick-off meeting
- Regular check-ins over the course of the project

Phase 2
- Submission, revision of draft surveys; administration and analysis of final surveys
- Collection and analysis of extant data from the district
- Four-day site visit by three-member team (including project director, project manager and subject matter expert) to conduct interviews, focus groups, and classroom observations
- Quantitative analysis of extant and survey data by data analyst
- Submission and revision of draft needs analysis (Word); submission and presentation of final report (PDF and PPT)

Phase 3
- Two visits by project director and project manager to facilitate strategic planning committees and school board (and use of virtual meetings if needed to supplement)
- Drafting and editing of strategic plan
- Submission and/or presentation of the strategic plan
- Final edits of strategic plan
- Layout and graphic design for plan

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- Presentation of plan to board and community

Phase 4
- Two meetings to establish success metrics
- Two meetings to complete action planning
- One input session on dashboard views
- One meeting with RQS technical/data team to transfer knowledge for updating dashboard views based on implementation data

Loaded Hourly Rates and Travel
- Project director: $220 per hour
- Project manager: $200 per hour
- Subject matter expert (needs analysis): $175 per hour
- Data analyst: $120 per hour
- Long distance travel
  - Needs assessment: 3 four-day trips at $1,500 each
  - Strategic planning: 4 three-day trips at $1,400 each

Staff

FourPoint is proposing a leadership team with years of experience working with and for school districts and states in the areas of needs analysis and strategic planning, governance and policy, school and district improvement, community engagement, and project management. The leadership team will be complemented by subject matter experts who will be selected based on the domains chosen for the information gathering and synthesis phase.

Scott Joftus, co-founder and president of FourPoint, is the proposed project director. Dr. Joftus brings significant experience helping districts plan strategically with a focus on equity and racial justice, leading FourPoint's work in this area and doing so for districts as diverse as Grand Island and Omaha (NE), Tulsa (OK), districts across Kansas, Washington, DC, Camden and Jersey City (NJ), Lee County (FL), Hartford (CT), Alexandria City (VA), and—currently—Champaign (IL) and Bensalem Township (PA).

Dr. Joftus was the primary developer and is now the director of The Learning Network, a partnership approach to school and school system improvement, which was implemented statewide in Kansas and now in Washington, DC. He was also the founding director, senior strategic advisor, and technical assistance provider of the Race to the Top Technical Assistance Network, a $43 million initiative funded by the U.S. Department of Education to help states implement major reforms and achieve dramatic improvements in student outcomes. Dr. Joftus also serves as an adjunct professor at

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The George Washington University's Graduate School of Education and Human Development, where he teaches leadership, program evaluation, and education policy.

> A senior team with unmatched experience in public school systems, needs assessment, school improvement, and strategic planning.

Previously, Dr. Joftus served as the policy director for the Alliance for Excellent Education, where he helped develop the agenda for the newly created policy organization focused on ensuring all students graduate high school prepared for college. From 1998 to 2002, Dr. Joftus was director of policy, research, and evaluation for The McKenzie Group, an education policy consulting firm. In this position, he conducted numerous evaluations for and provided technical assistance to the U.S. Department of Education and states and school districts nationwide.

He also served as a senior associate at the Council for Basic Education and as a strategic planning consultant to the San Francisco-based think tank Public Policy Institute of California. In addition, he was an elementary school teacher as a member of the first-ever corps of Teach for America. Dr. Joftus earned his bachelor's degree in public policy from Duke University, a master's degree in public policy from the University of California at Berkeley, and a doctorate in education policy and leadership from The George Washington University. He is currently completing his training to become an Intercultural Development Inventory (IDI) Qualified Administrator.

Iris Bond-Gill, proposed project manager, is founder and president of IBG Consulting, a minority- and woman-owned firm that specializes in strategic planning, school improvement, and equity reviews and training. Ms. Gill was Assistant Superintendent of Elementary and Secondary Education at the Office of the State Superintendent of Education (OSSE) in Washington, DC, where she guided the implementation of the District's ESEA Waiver and a number of K-12 reform initiatives. Prior to joining OSSE, she was Deputy Executive Director at the Campaign for High School Equity, a coalition of civil rights and education organizations, where she led the policy and advocacy agenda while fostering the coalition's relationships with members of Congress, the White House, and other Federal and State education policymakers.
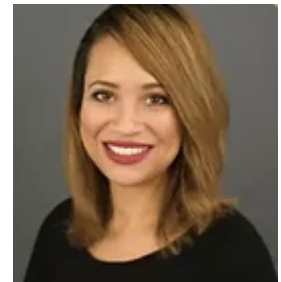
Ms. Gill has worked in education and youth policy for over 20 years, beginning as a classroom teacher in urban New Orleans where she taught under the auspices of *Teach for America*. She brings a passion for education as a vehicle for improving opportunities and outcomes for all young people. Ms. Gill has a Bachelor of Science degree from Arizona State University and a Master of Science degree from the H. John Heinz School of Public Policy and Management at Carnegie Mellon University. She is trained in human-centered design techniques by IDEO and is an Intercultural Development Inventory (IDI) Qualified Administrator.

Qualifications and Experience

FourPoint began operation as Cross & Joftus in 2004 under the direction of Christopher Cross (now retired) and Scott Joftus (current FourPoint President and proposed project director). Mr. Cross and Dr. Joftus created C&J to help education leaders achieve outstanding results for students. After years of

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growth and the addition of four new partners, C&J became FourPoint Education Partners in November 2017. Our commitment to supporting education leaders to improve outcomes for children and youth has remained the same, and we believe that our hard-earned reputation of unmatched customer service, deep knowledge and experience about education policy and school improvement, and a collaborative approach ensures that RQS will receive the support it needs to improve outcomes for all students.

FourPoint has a 17-year track record of helping districts serving low-income and minority students. We help education leaders achieve outstanding results for students by supporting schools, districts, and states through strategic planning, instructional leadership support, performance management, and technical assistance tied to college and career readiness. FourPoint has supported school systems across 34 states ranging from Hawaii and Los Angeles County in the West, to Omaha and Kansas in the Midwest, to Hartford and Washington, DC, in the East, to Hillsborough County (FL) and Guilford County (NC) in the South.

FourPoint has a significant amount of experience helping district and state leaders achieve outstanding results for all students, especially those who have historically been underserved. For the proposed engagement with RQS, four strands of experience in particular demonstrate our capacity: (1) strategic and action planning (2) advancing equity (3) organizational development and performance management and (4) school and district improvement.

Strategic and Action Planning

With a focus on equity and systemic coherence, FourPoint conducts organizational and system reviews for LEAs, SEAs, and education organizations across the country. These reviews always result in high-impact, actionable recommendations and often result in FourPoint facilitating the development of a strategic plan. For example, current or recent engagements include:

- Working with **Fairfax County's (VA)** Office for Children and the County's School Readiness Community Collaborative Council to develop a multi-year school readiness plan. The plan will allow the County and its partners to build on their efforts to ensure that families can access a network of high-quality early-learning programs and related supports.

- Working with **Champaign Unit 4 Public Schools (IL)** and **Alexandria City Public Schools (VA)** on a comprehensive organizational review and strategic plan with a focus on eliminating opportunity gaps and reducing achievement gaps for students of color. In both districts, the work was conducted at least in part during the pandemic, and board members expressed appreciation for the ways in which we engaged community and pushed the district to address issues related to educational equity and justice head on.

- Working with **Alief Independent School District (TX)** and **San Marcos Independent School District (TX)** to engage community and plan strategically for implementation of the Texas Education Agency's Additional Days School Year (ADSY) grant. FourPoint's engagement in both districts, occurring during the pandemic, included conducting interviews and focus groups with stakeholders, producing videos to communicate school and district plans, and facilitating development of strategic plans that are a requirement of the grant.

- Facilitating development of strategic and action plans for many other past district clients including **Topeka (KS), Omaha (NE), Grand Island (NE), Lee County (FL), Jersey City (NJ), Hartford (CT), Buffalo (NY), Bensalem Township (PA), and Guilford County (NC)**.

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Advancing Equity

As noted under our strategic planning experience, FourPoint conducts all our needs assessments and facilitates all strategic plans through an equity lens. In support of this work and other types of engagements, FourPoint has developed two documents:

- Our one-page "Policies and Practices that Promote Equity and Racial Justice in Our Schools" outlines strategies that districts can take to address structural racism in five areas: (1) access to high-quality schools (2) discipline and program placement (3) highly effective educators (4) curricula, instructional practices, and unbiased assessments (5) community schooling.

- Our "Planning for Re-Entry and Recovery: A Guide for Promoting Equity, Improvement, and Innovation" is meant to help district leaders facilitate discussions, analysis, and planning to prepare for returning to "normal" after the pandemic while taking advantage of the crisis to improve systems and support for our most vulnerable youth. As shown in the figure, the guide addresses seven key areas.

In addition to these resources, FourPoint has helped numerous districts advance equity and promote anti-racism through training and technical support. Our most recent examples include the following:

- Following the facilitation of a new strategic plan, currently helping **Grand Island Public Schools (NE)** work with the leadership team (through planning and training) to foster equity across the system.

- Currently helping **Champaign Unit 4 Public Schools (IL)** and **Alexandria City (VA) Public Schools** to plan, develop provide equity and anti-racism training, and design a new approach to family and community engagement.

- Working with the district's Diversity, Equity, and Inclusion Committee, currently conducting an equity audit for **Bensalem Township (PA) School District**. Following the audit, FourPoint will be partnering with the district to facilitate a regional conference on equity, provide training related to becoming an anti-racist organization, and support strategic and action planning to foster greater equity across the district.

Organizational Development and Performance Management

> "It's been clear throughout their engagement that FourPoint understands school district cultures, including the role of the central office as a school service entity. The team understood the political and social interplay that goes hand in hand with a superintendent's job. They understood how to leverage district and other resources to support principals as they look at effective practices that improve student achievement. Finally, their understanding of community proved to be invaluable when dealing with our parents, school board, nonprofits, and other key stakeholders. The team displayed forthrightness, commitment to implementation, and can relate to people on many levels. Skillful, dedicated and visionary, the FourPoint team garners my unequivocal support and recommendation."
>
> --Tawana Grover, Superintendent, Grand Island Public Schools

To promote equity, foster coherence, and ensure improvement, districts must make structural and systemic changes. These changes include restructuring the central office and revising district administrators' job descriptions to align with a new theory of action and strategy; defining, tracking, and reporting implementation and outcome metrics; and designing and implementing new systems and practices including classroom observations, coaching, data consults, program evaluation, and staff evaluation. Examples of recent FourPoint engagements include:

- Following the facilitation of a new strategic plan aligned with its District Models of Excellence, working with **Hartford Public Schools (CT)** central office department leads to develop detailed action plans that are aligned with the strategic plan and with the deputy superintendent's office to develop and implement a performance management system for ensuring continuous improvement that will result in achieving all strategic plan goals. FourPoint also helped to redefine the principal supervisor position; coached the executive directors of school leadership, chief of schools, and director of special education; and developed resources (descriptions, rubrics, Q&A, etc.) to support implementation of the district's new non-negotiables (also identified with FourPoint's support).

Hartford Public Schools
Leadership Meeting: Performance Management

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- Following the facilitation of a new strategic plan, working with **Omaha Public Schools (NE)** to define the new principal supervisor position, coach the new principal supervisors, develop a principal pipeline, and create and implement a new "Stat" process focused on school improvement.
- Following the facilitation of a new strategic plan, helping **Grand Island Public Schools (NE)** restructure its central office, and redefine and coach the new principal supervisor position.

- Developing and delivering training for instructional coaches in **Broward County Public Schools (FL)**.

- Helping **Champaign Unit 4 Public Schools (IL)** to restructure the central office, redefine and coach several district-administrator positions (including school leadership, equity, and teaching and learning), identify and implement new district non-negotiables, and design a new approach to family and community engagement.

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- Providing coaching to principal supervisors to improve instructional leadership in a number of districts, including **Hillsborough County (FL) Public Schools, Omaha (NE) Public Schools, Syracuse and Buffalo Public Schools (NY), Hawaii Public Schools, Council Bluffs (IA) Public Schools, Hartford (CT) Public Schools,** and **Waukegan (IL) Public Schools**.

- Developing and for the last six years managing the **Leaders Leading Leaders (3L) Institute**, which convenes and seeks to develop the leadership capacity of a community of principal supervisors from across the country. As part of the Institute, FourPoint conducted a review of how four participating districts—Kansas City (MO), Racine (WI), Council Bluffs (IA), and Waukegan (IL)—leverage the principal supervisor position to develop instructional leadership capacity at the school level.

School and District Improvement

> "I attribute much of FourPoint's success to their professionalism, their collaborative approach, and their ability to contextualize the services. The FourPoint team has a tremendous amount of expertise, but they approach the work in a humble way, working collaboratively and respectfully with education leaders while still pushing for excellence. I truly valued the partnership that I had with them during my tenure in Kansas, and strongly recommend them to any school system."
>
> --Diane DeBacker, Former Kansas State Superintendent

FourPoint may be the only organization in the country with experience in developing and managing the school and LEA intervention programs and professional development in two states (in addition, we have been approved to provide these services in two additional states—Hawaii and Indiana—and in New York City). Our approach to school and district improvement and professional development was developed in 2008, when we partnered with the Kansas State Department of Education (KSDE) to rethink the State's approach to school reform and increase local systems' capacity to raise achievement and close significant gaps in student learning. The partnership resulted in the Kansas Learning Network (KLN), a change strategy that intentionally bypassed less effective top-down attempts at reform and instead engaged professionals directly in improving results.

By the fourth and final year (2012-13), KLN supported all 36 districts and 43 schools in Kansas identified as on improvement, corrective action, or restructuring as defined by the No Child Left Behind Act. According to evaluations of participating LEAs conducted by graduate students at George Washington University's Graduate School of Education & Human Development, student achievement increased and stakeholders attributed much of the success to KLN.[5]

Based on the success of KLN, the District of Columbia's Office of the State Superintendent of Education (OSSE) contracted with FourPoint beginning in the 2014-15 school year to help transform the eight lowest-performing schools in the "State" (which comprises District of Columbia Public Schools and charter schools in DC). For this work, FourPoint partnered with OSSE to adapt KLN into The Learning Support Network and implement the model in the eight schools. During the first year of implementation,

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[5] Evaluations available upon request.

graduate students from GW's Graduate School of Education & Human Development again found that the Network contributed greatly to improvement of the participating schools.

Based on a promising formative evaluation and feedback from key stakeholders, OSSE contracted again with FourPoint in 2015-16 to implement the Learning Support Network in the state's 21 lowest-performing schools. Again, feedback from stakeholders was extremely positive, and FourPoint was asked to work with OSSE to support 28 of DC's lowest-performing schools in the 2016-17 school year.

The work proved to be impactful on student achievement. Of the 16 priority schools with which FourPoint worked during the 2016-17 school year, 11 showed gains in math and 13 showed gains in ELA from the previous school year.[6] Nine of these schools outpaced the average gains made across Washington, DC, in math, and all 13 schools outpaced the average gains made across Washington, DC, in ELA.

> "FourPoint has been a wonderful partner. Their team is made up of experienced, thoughtful educators who have served in almost every capacity in public education. This experience, I believe, gives them the understanding that there is no silver bullet in education but rather that improvement takes focus, effective coaching, content expertise, capacity building, and outstanding performance management. The FourPoint team helps us and the schools track progress in a way that improves implementation and leads to results."
> —Sharon Gaskins, Former Deputy Assistant Superintendent, OSSE

References

FourPoint Education Partners encourage RQS to contact the following references. Additional references and work samples can be provided upon request.

VERONICA NOLAN	Vice Chair, Board of Education Alexandria City Public Schools 1340 Braddock Pl. Alexandria, VA 22314	703-282-7609 veronica@dreambigbaltimore.org
TAWANA GROVER	Superintendent Grand Island Public Schools 123 S Webb Rd. Grand Island, NE 68802	308-385-5900 tgrover@gips.org
SUSAN ZOLA	Superintendent Champaign Unit 4 Public Schools 502 W Windsor Rd. Champaign, IL 61820	217-351-3838 zolasu@u4sd.org

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[6] OSSE defined gains as the reduction of the percentage of students scoring in levels 1 and 2 on PARCC.

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