

inflexion

decisions that drive student readiness

Red Wing Independent School District #256

Educational Planning Proposal

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Red Wing Independent School District #256 Education Planning Proposal

Edulytix at Inflexion proposes to partner with Red Wing Independent School District #256 in a highly inclusive and participatory process to facilitate the development of a comprehensive, adaptive 10-year education plan focused on a shared vision.

Our Approach to Strategic Planning

The Edulytix theory of what makes an effective district is founded on the development of a strong district identity that informs the structures that support learning aligned with a shared, holistic vision for student readiness (see Figure 1). A strong identity is developed through shared agreements about the purpose of education, beliefs about students and families, as well as the optimal relationship between the school/district and their families/communities; in addition, the identity reflects the mental models about how and which educational practices should be used. Schools and districts that thrive have three unique features: (1) a clear sense of identity, (2) a shared purpose, and (3) coherent systems and processes that reflect the school and district’s identities and support achieving the shared purpose. But *does the identity support achieving the school’s purpose?* Often, like culture, identity is not well articulated or commonly shared, nor used to guide strategy development or actions.

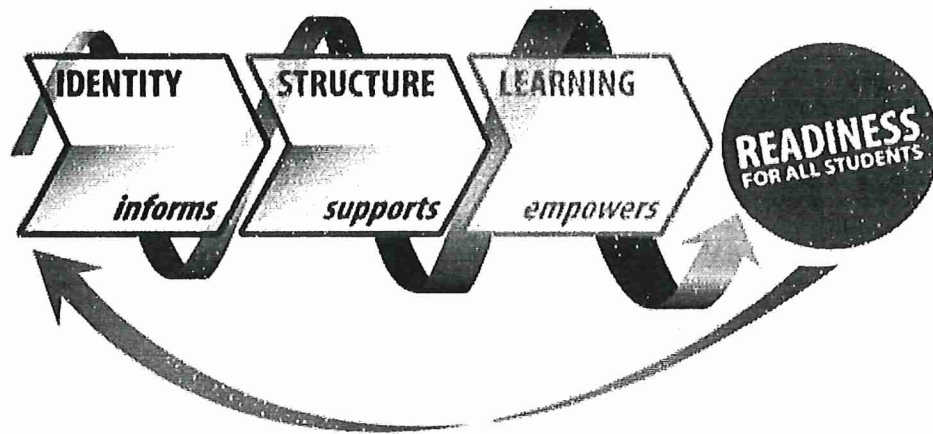


Figure 1. Inflexion Approach

At Edulytix, we challenge our school and district partners to focus on *how* they will implement their identity and vision and develop resources and processes that support implementation. Too often, education is focused on *the what*—what it is or what needs to be done—and not how to do it. When considering transformational change, much of the effort should go into addressing *the how*: Building resources and tools that support implementation. Specifically, we work with our partners to identify what processes and practices leaders need to use to challenge values, beliefs, and mental models held by people responsible for the change.

As part of our approach, we encourage Red Wing Independent School District to build a strategic education plan and subsequent implementation plans that embrace a tight/loose coupling approach, one that provides clear parameters and expectations yet allows for variation and creativity. We have found that successful scaling requires a district to be firm on *what*—the purpose, or vision for a graduate—yet recognize different school communities may take unique paths to achieve the vision.

Scope of Services

Our approach to this work will include three phases, with an optional fourth phase. In Phase 1, we will work with the district to define the two anchors: identity and purpose (i.e., holistic vision for student readiness). In Phase 2, we will determine the district's current state, including an environmental scan, and identify key strengths on which Red Wing can capitalize, as well as the gaps that must be addressed or mitigated through the strategic planning process. In Phase 3, Edulytix will collaborate with Red Wing strategic planning steering committee members to develop a customized, adaptive 10-year strategic plan. In an optional Phase 4, we would assist Red Wing Independent School District with strategic plan implementation. We propose that Phases 1 through 3 described herein occur between March and December 2022.

Project Kickoff and Planning

As noted in the RFP, the Red Wing Independent School District will select 5 to 8 steering committee members to guide the education plan development process. Once the steering committee has been established, the project will begin with a kickoff meeting involving Inflexion's Edulytix team and Red Wing's strategic planning steering committee. Through this meeting, we will develop a shared understanding of the project and ensure the process and deliverables outlined will adequately meet the needs of the team. Specifically, the initial meeting will include finalizing the scope of work and project timelines, agreeing to a progress update schedule, and making key decisions related to Phase 1 work. Once Edulytix and Red Wing agree on an educational planning process, we will collaboratively host a virtual open house to preview the educational planning process and obtain initial feedback from the district community. The Edulytix team will convene a second meeting with the steering committee to discuss the feedback from the open house and explore the necessary revisions. Finally, Edulytix will finalize the plan and timelines and distribute all documents to the steering committee. Inflexion's Edulytix team and Red Wing's strategic planning steering committee a final time to discuss the revisions and finalize the plan scope and timelines. Edulytix will prepare all materials needed for these meetings, facilitate the meetings, and document the meetings as part of our roles and responsibilities. Further, as in all Edulytix projects, we will take an adaptive approach to the management of this project, selecting techniques best suited to the project's objectives, environment, and personnel to optimize project delivery, while continuously collaborating with Red Wing strategic planning steering committee members to refine our activities based on learnings during each phase.

Phase 1: Define the Two Anchors

We will work with the district (via the steering committee) to develop a shared district purpose (i.e., a vision for student readiness) with district and community constituents, including students, families, caring adults, and other community members. From this vision for what students should know and be able to do when they exit the school district, we will backward map the knowledge, skills, and dispositions students should have on successful completion of elementary and middle school. This purpose becomes the end point.

The other anchor is an articulation of the district's identity, which represents the enduring, distinctive characteristics of how the district conducts its business. Identity forms the leading anchor for change through transparent communication of and commitment to sharing and acting from a common set of values, beliefs, and mental models.

We strongly believe that a district's purpose, or its holistic vision for student readiness, should be developed in collaboration with the district's communities. We train district staff and provide protocols for conducting community working sessions to discover community members' visions for what students should know and be able to do when they graduate from the district's schools. Full engagement by a broad base of school and community members ensures the vision for readiness truly reflects the hopes and needs of the communities served by the district. We will take the information collected during these working sessions and synthesize it into district maxims (identity) and a clear purpose that describes desired student outcomes. These serve as the foundation for all other activities.

Phase 2: Determine Current State

To be an effective strategic planning partner, Edulytix staff will develop an accurate and comprehensive understanding of the recent history and journey of Red Wing Independent School District, as well as potential future trajectories. As such, Phase 2 will consist of a comprehensive coherence review of key documents with input from key staff and community partners through assessments, interviews, and surveys.

Document Review

Edulytix research staff will perform a coherence review of key documents and systems. Our coherence review offers a new lens through which leaders may assess the comprehensiveness and alignment of organizational structures and services designed to address equity and increase student success. It is a process that helps district leaders to be more strategic and impactful with their efforts, resources, initiatives, planning, and classroom instruction. Several key questions guide our document review process:

- Is there evidence of a clear, shared sense of identity across the district that is reflected in school structures and processes?

- Is there evidence that the vision for student readiness is shared and aligned with efforts to support learning and in empowering students to be successful in college, careers, and a life full of choice?
- Is there evidence of coherence between and among (a) identity, (b) purpose (shared vision for readiness), and (c) district structures and school-based approaches to learning?

We will work with the strategic planning steering committee (or their designees) to purposely select key documents that contain the most relevant information. Documents may include, but are not limited to the mission, vision, and values; the current Education Plan; the Education Plan in Action; district surveys and individual school quality data; student achievement results; equity history; district initiative documentation and school improvement plans; demographic and enrollment trends; financial status and trends; scheduling and room utilization; facility condition assessment reports; and other relevant information compiled by the District. With a nondisclosure agreement in effect, Red Wing Independent School District and/or individual schools will share relevant documents during this initial period and on a rolling basis if additional documents become available.

The Edulytix team will design a detailed rubric to facilitate the review of Red Wing documents. The rubric elements will be adapted from the topical areas of the Inflexion Approach (see Table 1 below) to district improvement and will include other district functional areas that are relevant to the development of a customized, adaptive strategic plan. After reviewing documents, Edulytix staff will engage with the strategic planning steering committee and key school and community partners to discuss our current understandings and to allow for the steering committee to provide clarifications, fill in missing information, and correct any misconceptions we may have.

Table 1. Inflexion Approach

Coherence Categories of the Inflexion Approach to School Improvement	
Attribute	Descriptor
<i>Identity: Shared values, beliefs, and mental models across the district that are central, unique, and/or enduring.</i>	
	Values and Beliefs (clarity of, communication/known, evident in)
	Mental Models (clarity of, communicated/known, evident in)
	Community-Based (contextually unique, community built, continuously refined)
<i>Structures: The ways in which leadership, relationships, and equitable access are enacted reflects the school's identity and aligns with the vision for readiness</i>	
	Leadership (decision making is inclusive, talent pipeline aligns to school identity and purpose, communications are timely and transparent, continuous improvement is practiced, and there is coherence)

Coherence Categories of the Inflexion Approach to School Improvement	
Attribute	Descriptor
	Relationships (School Board-to-district staff, department-to-department, district-to-school, school leadership-to-school staff, school-to-student, school-to-family, school-to-broader community)
	Equitable Access (decision-making representation, range of student supports, expansive opportunities, coherence)
<i>Approaches to Learning: Curriculum, instruction, expansive opportunities, student learning supports all align with the shared vision for readiness</i>	
	Universal (shared rituals and routines, alignment to vision for readiness, use of targeted and universal teaching approaches, coherence)
	Expansive Opportunities (strategic and intensive supports, other programming, aligned with universal, group specific programming, coherence)
	Student Experience (inclusive practices, supports student agency, equitable access to opportunity, coherence)
<i>Vision for Readiness: A shared set of student outcomes that are holistic, valued, and known</i>	
	Holistic (outcome categories: cognitive and metacognitive, social emotional, wellbeing, behavioral)
	Valued (articulated purpose; evident in decision-making, key structures, approaching to learning, and accountability practices)
	Known/Empowering (basis for family partnership, expressed accessibly, aligned with developing student agency)

School-Level Coherence Audit (Capacity, Utilization, and Educational Adequacy Assessment)

The Edulytix team will perform a school-level coherence assessment for each school facility based on the document and systems review. Aligned to the Inflexion Approach described above, the school-level review will include three primary parts: 1) a capacity assessment, 2) a utilization assessment, and 3) an educational adequacy assessment. The capacity assessment will examine whether school staff collectively have the knowledge, skills, abilities, and time allocations available to support the shared district purpose and identity, as well as specific initiatives in the education plan. This assessment will also interrogate whether the systems and structures in place at the school support the shared district purpose, identity, and education plan initiatives. The utilization assessment will provide an objective review of how the school's assets, facilities, and staff are being used in relation to their capacity. The educational adequacy assessment will explore the ability of the school to meet district requirements

and educational plan initiatives by evaluating the existence, quantity, size, and configuration of spaces defined by education specifications. Again, the Edulytix team will use a tailored rubric to facilitate the review of school-level documents, and Edulytix staff will engage with the strategic planning steering committee and key school and community partners to provide clarifications, fill in missing information, and correct any misconceptions we may have. Further, results from the school-level coherence assessment may inform topics explored in the key district and school leadership interviews and the school community feedback survey.

District and School Community Input

Edulytix staff will take a two-pronged approach to gathering a broad range of perspectives from staff and community members: key district and school leadership interviews and a school community feedback survey. The Edulytix team will compile, analyze, and present the results of the interviews and survey. These data will add nuance to the document review and school-level coherence assessment and inform the gap analysis and strategic plan development (Phase 3).

Key District and School Leadership Interviews

First, we will conduct virtual interviews with Red Wing district staff and administrators at each school facility. The design and structure of individual and group interviews will be carefully considered in collaboration with Red Wing's strategic planning steering committee prior to data collection to (a) ensure common goals for the interviews about "current state" and (b) modify questions and/or interview types to collect data most pertinent to each group. Of particular interest will be examining the current understanding of the district's identity and how that aligns with what Red Wing Independent School District aspires to communicate about this identity, as expressed in the mission, vision, and values. Interview data will be analyzed thematically using a priori and emergent codes.

School Community Feedback Survey

Building on the school-level coherence assessment and the key district and school leadership interviews, Edulytix will develop and administer a customized feedback survey to the broader school community (e.g., school personnel, students, parents, and key community members). Edulytix researchers and strategic planning steering committee members will collaboratively determine the most appropriate sampling plan for survey administration and ensure the most suitable representatives are selected for each group. Again, we will focus on the current understanding of the district's identity and how that aligns with what the district aspires to communicate about this identity, as expressed in the mission, vision, and values. Survey data will be analyzed descriptively for frequencies and variability. We may disaggregate survey responses by school or other key groupings of interest to Red Wing (e.g., role, gender, race, time in district/school).

Edulytix staff will collaborate with district and individual school leaders and incorporate broad community input to examine the alignment between the *current* and *aspired* state and identify gaps and challenges that can be addressed through the strategic planning process (see the section, Our Approach to Community Engagement, later in this document). Drawing on the selected documents

and conversations with steering committee members and other invested school and community members, we will complete Phase 2 with a gap analysis.

Gap Analysis

We will collaboratively review what evidence exists to determine how well Red Wing Independent School District is developing students who graduate with the knowledge, skills, and confidence articulated in the vision for student readiness. We will interrogate existing structures and practices to determine strengths on which Red Wing Independent School District can capitalize, as well as the gaps or challenges that must be addressed or mitigated. Ultimately, the goal of Phase 2 is to provide the Edulytix team with a thorough understanding of Red Wing's current work. Applying this understanding, we will collaborate with the steering committee to identify areas of strength and gaps in current functioning. The gap/challenge analysis technique involves a comparison of current performance against some potential or desired performance, which would be articulated through Red Wing's identity statements and vision for readiness, as well as other metrics selected by the district and/or their constituents. A gap analysis provides a way to identify and document suboptimal or missing strategies, structures, capabilities, processes, practices, technologies, or skills. This technique will allow us to describe the gaps or weaknesses that exist and quantify the differences using a categorical scale. Identified gaps can be prioritized with recommendations developed around each gap or set of gaps.

Once the Edulytix team has completed the gap analysis, the steering committee, School Board, and key school and community partners will be provided an opportunity to review the gap analysis results and add missing information prior to the development of the strategic plan. Further, we will discuss the prioritization of the identified gaps based on Red Wing's aspirations and potential recommendations. Finally, Edulytix researchers will develop policy and practice recommendations based on the gap analysis results that will serve to inform the education planning process.

Phase 3: Develop Strategic Education Plan

Edulytix staff will collaboratively draft an adaptive strategic plan that embodies Red Wing's equity stance and will result in students achieving the shared readiness outcomes. An adaptive strategic plan is more agile than a static, traditional plan, allowing for more engagement, continuous improvement cycles, and iteration as needed to keep it relevant. This is the strategic process of "Setting a direction and testing to it," instead of "Making a plan and sticking to it."¹ The strategic plan will focus on a few key initiatives derived from the document review and gap analysis recommendations and collectively prioritized for the next 10 years as offering the greatest leverage for substantial progress toward Red Wing's desired outcomes. Each initiative's description will include the high-level activities, a logic

¹ O'Donovan, D., & Flower, N. R. (2013, January 10). The strategic plan is dead: Long live strategy. *Stanford Social Innovation Review*.

chain of leading indicators noting progress, and a timeline for progress markers and regular reflection. The initiatives will provide enough detail that district departments and schools will be able to align their activities to the initiatives. The plan will be written in language that is easily understood by educators and community members.

The Edulytix team will work with the steering committee to establish an agreed-upon process for the development of the strategic education plan. Once a process is agreed upon, we will collaboratively host a virtual open house to preview the process and obtain feedback from the district community. Although the final process will be developed in collaboration with the steering committee, Edulytix anticipates that we will hold several work sessions with the steering committee to develop the strategic plan. Edulytix staff will prepare materials for the meetings, facilitate the strategic planning committee meetings, and document and summarize information from those meetings. We also will serve as facilitators and contributors throughout the writing of the plan. The strategic plan will include short-term and long-term programming recommendations, as well as identify resources needed to accomplish recommendations. Edulytix will work with the steering committee to incorporate the recommendations into district educational and facility plans. Finally, the Edulytix team will submit planning documents (including timelines) to implement recommended changes. Due to ongoing pandemic issues and distance, most meetings will be held virtually, although our budget includes four onsite visits (mostly for workshops).

The first work session of the strategic planning committee will involve reviewing the summary information from Phase 1 and 2 and engaging in goal identification activities. Once strategic goals are well articulated and the group is satisfied that the goals align with Red Wing's vision, we will be ready to engage in a work session to elicit the key drivers that will have the greatest impact on those goals. A subset of the steering committee will then work with Edulytix to take these goals and key drivers to draft the core high-level strategies that are predicted to strengthen those key drivers in the system that will lead to the ultimate goals. The larger steering committee would then meet again to brainstorm the existing strengths within the system (continue to do) and the changes needed within the system (stop doing and start doing) to ensure alignment between and among the district's structures and processes and the key drivers that will be needed to achieve the organization's strategic goals. Edulytix will take the information from the strategic planning steering committee work session and draft the strategic plan. The strategic planning steering committee will meet again to review the draft plan through a structured process, reviewing for integrity to Red Wing's identity, alignment with the overall vision, and vertical and horizontal coherence.

The draft plan will be shared in an open house (community feedback session) with a broad set of community members, cofacilitated by Red Wing and Edulytix staff. Broad community engagement in the development of a strategic plan will help the organization address the needs and hopes of its community and align with Red Wing's commitment to diversity and equity. Further, a transparent and well communicated plan ensures that Red Wing holds itself accountable to its community. Further revisions will be made, if needed, before it is finalized and approved by the School Board. The Edulytix team will present short-term recommendations to the School Board by May 1, 2022, and long-term recommendations by December 31, 2022. Further, Edulytix will compile and provide a digital and hard

copy publication documenting the educational planning process, background information, and recommendations by no later than December 31, 2022.

Workshop Sessions/Tours of Highly Effective Schools

Edulytix will host up to ten workshops for Red Wing Independent School District: up to five workshops for students during the school day and up to five workshops for students, employees, and community members. The Edulytix team will collaborate with the steering committee to identify topics to explore during workshop sessions. Topics for these workshops may include, *but are not limited to*, options for grade configurations, early childhood education, year-round schooling, sustainability/environmental programming possibilities, examples of effective magnet programs, career/technical programming possibilities, and other identified areas of interest. Edulytix staff, and other staff at Inflexion, have deep knowledge about a number of priority topics; in addition, we may leverage our strong connections with leading practitioners and other experts to ensure high quality workshop content.

The Edulytix team will prepare, facilitate, and document the workshops. Edulytix will also assist Red Wing in providing in-person or digital tours of highly effective schools with innovative programming. Edulytix can serve a key role in facilitating connections with these highly effective schools and identify and recommend videos of highly effective schools (e.g., High Tech High). We anticipate four in-person site visits, in which we would conduct two workshops each (for a total of 8 in-person workshops). We will also conduct two online workshops. We expect these workshops to take place between September and December 2022.

Phase 4: Support Implementation (Optional)

Once the strategic education plan is created, there will be phases of implementation across Red Wing's district departments and schools. Aligning the day-to-day work of myriad departments and individual schools to a strategic vision can be a daunting endeavor. Coming out of years of unprecedented challenges in education, this may feel especially overwhelming. Having a third-party to support implementation and serve as a "critical friend" could ease the burden and smooth the process of implementing the tactics and strategies necessary to achieve Red Wing's vision for readiness. Edulytix staff are ready to assist the organization in turning the plan into sets of reasonable, actionable steps that will lead the organization toward its strategic goals. Below are some examples of how we may help. Please note that Phase 4 activities are not included in the budget but may be negotiated at a later date if desired by Red Wing Independent School District.

- **Provide Technical Support for Department-Level Implementation Plans.** Every sector of the district must align its work with the strategic vision, supporting and/or building the capacity of schools to create instructional experiences that foster student learning through rigorous and relevant experiences, along with a sense of belonging, connection, and engagement. Edulytix staff could support individual organizational departments or teams through virtual working meetings to develop tactical plans, reviews of plans with guidance and suggestions, and reflection meetings to assess progress and/or feasibility of the tactical plans at 6 and 12 months after plan development.

- **Provide Technical Support for School-Level Implementation Plan.** School-level implementation plans will need to be developed collaboratively so that each school has a plan of implementation that aligns with the overall strategic vision. Edulytix staff could support individual schools through virtual working meetings, similar to our support of organization-level departments.
- **Creation of Annual Calendar:** Edulytix staff will be available to assist in creating an Annual Calendar, which will chronologically illustrate the tasks that must be completed during each of the years included in the strategic plan.
- **Developing Progress Monitoring Protocols:** We are also available to collaboratively develop, with Red Wing staff, protocols for assessing progress, asking the right questions, and supporting district leader and school leader plan implementation. This would be conducted through virtual working group sessions with the Red Wing leadership team and/or others who wish to be involved in these activities.
- **Development/Review of Progress Monitoring System/Tool:** We recommend Red Wing invest in a progress monitoring tool to keep the strategic plan front and center in the work of departments and schools. Edulytix staff will review potential tools with the district's partners. Edulytix staff will propose primary reflection questions that will guide what information is gathered and from whom.
- **Review and Recommendations for Ongoing Communications:** Edulytix will provide recommendations for continuous and fluid ongoing communication throughout the district and its communities about the strategic plan itself and then progress made at milestone points.
- **Drafting/Enhancing the Instructional Vision:** The instructional vision identifies the key expectations and foundational elements for all instructional programs. In addition to identifying the key instructional features all students should experience every period every day, the codeveloped instructional framework would include the supports and extracurricular/out-of-school-time experiences that shape the overall educational experiences of students. The framework would be straightforward and interpretable by all those involved in educating students, thus including families, out-of-school-time partners, and others in addition to the educators in the schools.
- **Develop the Instructional Game Plan:** Edulytix staff would work with Red Wing leadership to review the district's structures to ensure they support the instructional vision. These structures include, but are not limited to, governance, the talent pipeline, assessment systems, accountability systems, and professional development. The instructional game plan must be clear, coherent, and phased in ways that allow for early successes, transparent monitoring, and clear responsibilities and timelines. We will draft the instructional game plan in concert with key personnel before iterating on the draft with input from other district and school leaders.

Schedule

The following project schedule provides a summary of activities as described above. This schedule will be finalized in collaboration with the Red Wing strategic planning steering committee.

Table 2. Project Timeline

Month	Task	Milestone/Deliverable
Phase 1: Define the Two Anchors		
March 2022	Establish steering committee Kick-off meeting to finalize the scope of work and timeline Overview and planning for defining the two anchors Gather community feedback on the process Finalize the scope of work and timeline Draft data gathering protocols	Steering Committee Agreed-upon timeline for activities Process documentation and protocols Virtual Open House Draft protocols
April 2022	Finalize data gathering protocols Identify key collaborators (district and school staff, students, families, and community members) Schedule sessions for defining two anchors Develop shared district purpose with district and community collaborators Develop district identity with district and community collaborators	Finalized protocols List of collaborators Defining anchor sessions District purpose statement District identity statement
Phase 2: Determine the Current State		
May 2022	Draft list of key documents and systems for review Finalize list of documents Secure all documents for review Draft document review rubric and school-level coherence (CUEA) assessment rubric Identify of key collaborators (district and school staff, students, families, and community members) Present short-term recommendations to the School Board	Draft list of documents Finalize list of documents Draft rubrics List of collaborators Presentation to the School Board
June 2022	Finalize document review rubric and school-level coherence assessment rubric Start reviewing/rating key documents Draft interview protocols and survey	Finalized rubrics Draft protocols and survey
July 2022	Finish reviewing/rating key documents Perform district-level coherence audit Perform school-level coherence (CUEA) assessment	District coherence audit School-level coherence assessment
August 2022	Schedule district and school leader interviews Conduct/facilitate interviews Start analyzing/synthesizing interview data Launch school community feedback survey	Interview schedule Feedback survey invitations

Month	Task	Milestone/Deliverable
September 2022	Finish analyzing/synthesizing interview data Administer school community feedback survey Data analyses, gap analyses; synthesis and reporting Gap analysis working session Preparation of packets of information for strategic planning Two workshop sessions/tours of highly effective schools	Summary of results Gap analysis working session Strategic planning information packet Workshops/tours
Phase 3: Develop Strategic Plan		
October 2022	Overview and preparation for strategic planning Gather community feedback on the process Share packets of information for strategic planning Prep for strategic planning sessions Strategic planning working session Three workshop sessions/tours of highly effective schools	Process documentation and protocols; logistical schedule Open House Steering committee working session Workshops/tours
November 2022	Start drafting strategic plan; iterate with strategic planning steering committee Full draft of strategic plan Schedule and plan community feedback sessions Hold community feedback sessions Three workshop sessions/tours of highly effective schools	Draft strategic plan Community session schedule Community feedback sessions Workshops/tours
December 2022	Hold community feedback sessions Edit strategic plan as needed based on feedback Two workshop sessions/tours of highly effective schools Finalize strategic plan Finalize recommendations for implementation Present long-term recommendations to the School Board Submit all materials to Red Wing Independent School District	Community feedback sessions Workshops/tours Finalized strategic plan Dissemination plan Presentation Final materials in digital and hard copy
Phase 4: Support Implementation (Optional)		
January 2023 to December 2023	Work on the selected services to support plan implementation; end contract when completed	Dependent on support services selected

As a partner, Edulytix staff prioritizes flexibility in meeting client needs over adhering to strict timelines. We meet clients where they are and scaffold and build capacity as we work through the strategic planning process. We understand the challenges associated with this process and create a nonjudgmental environment as we set the conditions for success. The proposed work is most successful when readiness dictates our progression through the process, completing each step and

providing adequate time to truly engage staff, students, families, and community, and to make sense of the information gathered. Given our experience, it takes time to do this well and the amount of time needed depends on several factors beyond our control. Although we propose a project schedule, to ensure success of the project and resulting strategic plan, the latest date at which each project activity will start would be based on group readiness.

Qualifications

Founded in 2002 as the Educational Policy Improvement Center (EPIC), Inflexion is a nonprofit consulting group that helps educators better equip students for success. Our mission is to make education work for *all* students, including first-generation college attendees and historically underserved groups of students (Black, Latino, Native American, students with disabilities, and students who are economically disadvantaged). We are committed to ensuring *every* student receives what they need to succeed, recognizing that the playing field remains inherently unequal. We believe that equitable education systems respect students as individuals, play to students’ strengths, value students’ unique experiences and perspectives, and allow for the individual ownership of learning along a path driven by students’ interests and aspirations. Additionally, we believe readiness and success should be defined by students’ engagement, adaptability, and what they can do with their knowledge. Moreover, we strive higher, aiming to infuse idealism and optimism back into education, and reminding ourselves and each other of education’s true power: to open doors; to ignite curiosity; to be catalysts for lifelong learning. We have a strong organizational identity, summarized in our maxims, shown below.



Figure 2. Inflexion’s Maxims for Our Own Staff and Community

We collaborate with districts and schools to create learning communities with the right systems and supports so that *all* students are graduating truly ready for college, career, and life. We partner with leaders and leadership teams to provide strategies and frameworks that simplify and identify opportunities for real and actionable improvement in systems, schools, and classrooms. Our strategic

work with leadership teams creates clarity amid many challenges and empowers school communities to strengthen and sustain a culture that can support every student's readiness and educational success. Our partners are those who seek holistic systemic change, rather than settling for tactical shifts or bouncing from one short-term and short-lived effort to the next. They are willing to be challenged and to commit to building mission-driven, student-centered, and equity-focused environments designed to meet the needs of *all* students. At Inflexion, we help district and school leaders who are dissatisfied with the status quo and are motivated to discover what really works in classrooms and across campuses. Our experiences as educators, researchers, and facilitators place us in a unique position to inform and empower leaders and leadership teams toward transforming their strategies for ensuring student readiness.

Inflexion's staff consists of 33 individuals with backgrounds in public policy, K-16 education reform and school improvement, social science research, statistical analysis, software development, program evaluation, communications, financial management, graphic design, and social entrepreneurship. Our work branches, which operate in a cross-functional manner, include (1) planning, research, and evaluation (Edulytix); (2) school partnerships (Portico); (3) technology solutions (Edutech); (4) end-user phone support (Technology Services Center); and (5) finance and operations. An interdisciplinary skill set, combined with an organizational structure of cross-functional teams, allows Inflexion to efficiently plan and effectively execute complex projects. Inflexion maintains a reserve of consultants, or subcontractors, available as needed when specific areas of expertise are not available among Inflexion staff.

Edulytix at Inflexion partners with education clients to provide education research, program evaluations, and strategic planning support. The Edulytix team has worked with school districts and intermediary organizations on strategic planning initiatives. With Merced Union High School District (CA), Inflexion staff reviewed the district strategic plan and associated documents and facilitated group convenings of Career and Technical Education (CTE) instructors, AP instructors, and then school counselors to assist those groups in drafting department tactical plans that aligned with the district strategic plan. We also have been providing ongoing strategic support to the Anaheim Union High School District (CA) and the Orange County Department of Education's multiyear, statewide implementation of multi-tiered system of support (MTSS). Further, Edulytix works currently with San Francisco Unified School District, Vista Unified School District, and Anaheim Union High School District on the planning and implementation of strategic initiatives that will focus on bringing coherence to the school systems.

Our Commitment to Equity

Inflexion's commitment to anti-racism, diversity, equity, and inclusion is an essential part of our approach to assisting schools and educational organizations transform to better serve all students. We believe a well-developed understanding of the intersectionality of individuals in and as part of a community is necessary to create equitable education systems. We strive to deconstruct structural inequities that burden and oppress students of color and students from economically distressed households, and support educator mindsets that value equity of opportunity and outcomes so

student trajectories are not predictable from their demographic characteristics. We promote interrogating systems through a lens of targeted universalism, ensuring prioritization of universal instructional strategies that best support those student groups traditionally furthest from opportunity.

We are committed to guiding our partner schools and districts in their development of shared purposes that are co-constructed with their communities. For six years, we have worked with racially and ethnically diverse leaders who are effectively transforming schools to better serve all students by centering the student experience. These leaders have expanded our knowledge of the structures and systems that must align with a school's identity to equip students with the skills represented in a holistic vision of readiness--the district's purpose. Our theory of change has developed from organizational theory, school improvement research, and by studying equity-centered schools that are achieving strong results with all student groups. Equity and anti-racism have been the backbone of our continuous improvement work with schools, and we constantly interrogate our own internal systems and strongly encourage our school partners to do the same.

Our Approach to Community Engagement

Eduytix at Inflexion prioritizes obtaining a complete and accurate view of a district's system and outcomes. It is important to identify target audiences and acknowledge all parties. The goal of collecting leadership, school personnel (i.e., faculty and staff), and school community (i.e., students, parents, alumni, donors, and community partners) feedback is to hear the experiences, vision, values, and beliefs of all the key players in the system. There is more than one "right" way to go about collecting feedback. The most important considerations are that (a) everyone should feel the space is safe to truly express their opinions and (b) we proactively seek out voices that may be easy to overlook, not just the voices clamoring to be heard. Eduytix staff will collaborate with the strategic planning steering committee to identify the most appropriate and relevant internal and external collaborators to include in the feedback process to best understand current and future needs to streamline plans in determining the extent of achievement goals for those plans.

We emphasize the engagement of the entire school community, including students and families, as these relationships are critical to success. Through our work and experience with schools, we have found that student and family engagement is perhaps the most community it serves. Unfortunately, as many educators know, strategic plans are not always developed in partnership with students, parents, and other members of the community. Further, surface-level community engagement diminishes the power of strategic plans for generating a mutual understanding of purpose and commitment from parents, students, and the broader community. School systems and their schools take a significant step toward creating culturally responsive learning approaches when they embrace and leverage the assets of their communities to create their strategic plan. Thus, we focus on involving students and families in the strategic planning process.

In our work with partners, we strive to ensure representativeness of students and families while minimizing power differentials. Both in terms of input and participation, our partner districts must work to secure a representative group of student and family participants. Research shows certain

groups of individuals are less likely to participate in group engagement sessions (e.g., single parents, those with diverse cultural and linguistic backgrounds). Simply sending out invitations to provide input or participate in a school-based event is not enough. We encourage schools and districts to take an equitable approach, making intentional efforts to reach those students and families they know are less likely to engage with educators and to create systems explicitly designed to ensure that dominant perspectives do not overpower the input and voice of historically marginalized groups of people. When privilege and power dynamics are not identified and managed, soliciting input can turn into a symbolic exercise rather than an authentic process that leads to a shared vision for readiness representative of the district and its community.

Strategic Planning Staff

EduLytx partners with clients to engage in strategic planning, system coherence reviews, needs assessments, environmental scans, and program evaluation. The key project team members represent a wealth of experience in education at various levels, including classroom teaching, school- and district-level administration, and research/evaluation in education, as well as project management. Below are the bios for the key staff members who would work with and develop professional relationships with the Red Wing strategic planning steering committee and assist in the strategic planning process. Resumes are included in Appendix A.

Kristine Chadwick, Ph.D. | Principal Strategist

As Chief Learning Officer at Inflexion, Kristine leads internal and external projects and initiatives that focus on strategic planning, knowledge management, continuous improvement, and program evaluation. Kristine led the strategy work with Merced Union High School District and supported strategy development with Anaheim Union High School District. At her previous employer, she assessed the alignment of strategy with districtwide processes to ensure a low performing district improved its structures and functioning to help its schools raise achievement levels. She also developed self-review rubrics to assess the extent to which district support services, such as transportation and technology, were aligned with the district's vision. She has conducted studies of comparative performance of students with disabilities for a state education agency with the goal of illuminating districts performing above the norm and those in need of assistance. Kristine brings 30 years of experience working with diverse client groups in education and community development. Highly trained in program evaluation, she has extensive experience and formal training in systems theory, program theory (and theories of change and improvement), collection and analysis of all types of data, and data sensemaking to drive evidence-based decision making. Throughout her career, she has facilitated organization improvement and coherence by understanding the client's system and the interconnectedness and dependencies within the system. She holds a doctorate in psychology, with concentrations in program evaluation and organizational learning and behavior from the University of Rhode Island. She also has diligently studied strategic planning, completing the certificate program in strategic management at DePaul University.

Matt Coleman, D.Ed. | Senior Strategy Consultant

As the Chief Executive Officer at Inflexion, Matt focuses on school systems change to produce demonstrable results rooted in organizational theory and informed by Matt's extensive experience working at every level of the secondary education system. With almost 30 years of experience in education, he has served as an educational assistant, middle school teacher, high school teacher, high school assistant principal, middle school principal, high school principal, director of secondary education, and assistant superintendent. In his administrative roles, Matt supported significant change resulting in improved outcomes for all kids—with a positive, differential impact on students who have been historically underserved. In his role as assistant superintendent in Springfield Public Schools, Matt led and supported high school reform efforts that increased cohort graduation rates, decreased dropout rates, increased enrollment in advanced programs, and significantly reduced the gap in achievement between different cultural groups. Since joining the organization in 2014, Matt has led an intentional shift to working directly with school and district leaders to make Inflexion's work more accessible to educators.

Jessica Jacovidis, Ph.D. | Strategy Consultant

Jessica is a principal researcher with 12 years of specific expertise in the areas of quantitative and mixed research methodologies and analyses. She has worked on evaluations for diverse clients, including the International Baccalaureate Organization, the College Board, and the AVID Center. Jessica has led the development of strategic research plans for multiple clients and assisted with the Merced Union High School District strategic planning project. Prior to joining the Edulytix team at Inflexion, she worked in the Center for Assessment and Research Studies (CARS) at James Madison University (JMU). Her responsibilities included articulating program theory; developing assessment frameworks and processes that aligned with accountability and accreditation requirements; and building assessment capacity for general education, academic affairs, and student affairs staff through direct consultation, professional development workshops, and providing feedback on assessment processes through assessment report submissions. Jessica also served as the assessment liaison for the University Health Center, assisting with the development of a strategic plan specific to the Center's assessment initiatives. She served as the assessment liaison for the Office of Disability Services, coordinating testing accommodations for university-wide assessment days.

Tracy Boussetot, Ph.D. | Partnership Consultant/Facilitator

As a former science and math educator, Tracy provides extensive practical knowledge of secondary education and the importance of connecting academic knowledge with real-world experiences. She brings 18 years of experience in education across school-based and research and evaluation lenses. Her work at Inflexion as a school partnership consultant currently includes facilitating monthly meetings with administrators participating in Inflexion's Portico leadership development program. Other work within the Edulytix team has included evaluation design and reporting for Roadtrip Nation, evaluation capacity building and workforce research and alignment at the Salem-Keizer Career Technical Center, research on two NSF funded programs currently developing and testing curriculum

modules designed to increase student awareness of STEM college and career pathway possibilities, bright spots and evaluation studies with schools implementing AVID, using collective impact models to assist the Oregon Chief Education Office (formerly known as the Oregon Education Investment Board), and its collaborative groups across Oregon to define indicators of progress and success. She has a strong background in quantitative, qualitative, and mixed methods research design, including the development of data collection instruments and conducting school site visits and interviews/focus groups at schools across the country.

Gabriella Schuhe | Research Assistant

As a person who never believed she could attend college herself, Gabriella is passionate about making education available to every person--especially those with underrepresented identities who may otherwise not consider pursuing an education. It is important to her to understand the compounded identities that make experiences unique for marginalized communities and to highlight how issues must be addressed in various ways to build up every person. Prior to joining Inflexion, Gabriella worked with underrepresented populations, including CalWorks, a CA state organization where she facilitated learning online to help adults from low-income families obtain a higher education. In this role, she worked directly with students with various learning disabilities and attentional challenges to embrace their strengths and discover solutions with them together. Gabriella is excited by using social theory and statistics to understand social phenomena and is skilled in mixed methods research.

Celia Wright | Project Manager

Celia has more than 13 years of project management experience ranging from overseeing the development of affordable housing initiatives to spearheading youth programs. Her previous experience working with youth of all abilities includes being the S.M.A.R.T. (Science, Math, and Relevant Technology) Instructor for Girls Inc. of Greater Santa Barbara, a nonprofit organization that serves girls from under-resourced communities. She created the Earn and Learn Youth Summer Employment Program to provide skill building opportunities and professional experience in fields of personal interest for youth served by the Housing Authority of the City of Santa Barbara. This program won a National Award of Merit by the National Association of Housing and Redevelopment Officials. She excels in managing projects from the early stages of conceptual planning through completion. Celia works with clients, professionals, and project-related personnel on coordination, program development, scheduling, deadlines, and implementation of the project details to build a successful project.

References

Edulytix has a broad range of experience facilitating sessions leading to the design and roll out of strategic plans and instructional frameworks for a district. Our most relevant experience is grounded in helping districts develop and bring a shared vision for student readiness to life. A work example can be found in Appendix B.

Deliberate Reflection for Deeper Learning Research Practice Partnership (Hewlett Grant)

Manuel Colòn

Chief Academic Officer
Anaheim Union High School District
colon_m@auhsd.us
714.765.7828

Description of Work: Edulytix staff at Inflexion has partnered with AUHSD to produce knowledge on how addressing a school's identity and organizational infrastructure influences efforts to diffuse reflective practices in a way that leads to equitable scaled impact in large school systems.

MUHSD Strategic Planning: Advanced Placement, Counseling, CTE

Constantino Aguilar, EdD

Assistant Superintendent of Educational Services
Merced Union High School District
caguilar@muhsd.org
209.325.2061

Description of Work: Edulytix staff at Inflexion partnered with Merced Union High School District to review the district strategic plan and facilitated group convenings of CTE instructors, AP instructors, and school counselors to assist those groups in drafting department tactical plans in alignment with district strategic goals.

Metacognitive Skills in IB Curricula

Sarah Manlove, PhD

Research Manager
International Baccalaureate (IB) Organization
sarah.manlove@ibo.org
+31 70 352 6000

Description of Work: Edulytix staff at Inflexion partnered with the International Baccalaureate (IB) Organisation to examine how metacognitive skills are addressed and supported within and across IB programmes. This work involved a comparative scan and curriculum audit to explore the alignment between IB programmes and (a) best practices in the literature (i.e., absolute comparisons) and (b) exemplar programmes in the field.

Costs

Edulytix proposes to complete Phases 1 through 3 for a fixed fee of \$50,000. The fee associated with each phase of the scope of work is provided below. Phase 4 options, if desired by the district, would be negotiated at a future date.

Table 3. Proposed Budget

Phase	What's Included	All-Inclusive Fixed Cost
Develop the Two Anchors	<ul style="list-style-type: none"> Project Management Kick-off Meeting Interviews and synthesis Facilitated data gathering sessions Facilitated work sessions to finalize identity statements and shared vision for readiness Finalization of district identity and shared vision for readiness documents in formats to be shared internally and with external community 	\$10,023
Determine Current State	<ul style="list-style-type: none"> Project Management Document analyses Interview protocol development Interviews and coaching for district-led interviews Community listening sessions Data analyses, gap analyses, and synthesis and reporting Preparation of packets of information for strategic planning 	\$13,922
Develop Strategic Plan	<ul style="list-style-type: none"> Project Management Workshops Strategic planning work sessions Draft of strategic plan Community feedback sessions Finalization of strategic plan Recommendations for implementation 	\$26,055
TOTAL	Inclusive of all three phases above	\$50,000