Five Year Strategic Plan

effective July 1, 2023
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When our world and communities experience dramatic change, what we expect and need from our public schools changes, too.

We are so excited to share the incredible advancements we've made in the education sector and at BES over the past year to ensure the changing needs of students, families, and communities are met. We embrace our commitment to community, equity, and anti-racism - values that shape our team internally and guide us as we work with leaders and students around the nation. Despite the challenging times, we remain hopeful that educator burnout and shortages can be overcome and learning gaps can be bridged.

We believe that, now more than ever, BES’s charge to identify and prepare excellent leaders to transform education in their communities is the right one and one that can play a key role in shaping the future of teaching and learning.
Key Themes

As we listened and reflected on BES and the broader landscape during the strategic planning process, several key themes emerged that help inform our plans for the future.

**Responsiveness**
The shift we made three years ago to prioritize a responsiveness to community, a focus on anti-racism, and supporting varied and innovative school models continues to be essential.

**Evolution**
The BES Fellowship remains a unique and impactful offering in the sector, though there are headwinds facing charter growth that will require continued evolution of our work.

**Sustainability**
The need for leadership development and “bench building” in education is at a critical level. Our leadership development programming offers a scalable and sustainable way to meet that need.

**Community**
The emergence of more local education champions offers a way for BES to more deeply engage community voices and requires more collaboration and coordination.

**Optimization**
The last three years presented high levels of complexity and change for BES (and many other organizations) and there is a need to simplify and optimize our work to make our operating model more effective.

**Impact**
As a national organization with deep and unique expertise, BES can continue to grow its role in supporting a healthy national education ecosystem.
Key Questions

Current State
What is the current state of BES and the broader landscape?

Goals
What are BES' goals for the next five years?

Strategies
What are BES' key strategies for the next five years?

Model
How should BES optimize its operating model to execute successfully over the next five years?
Planning Process

We chose to have a thorough strategic planning process, with broad and open input from internal and external stakeholders.

Current State Assessment
- Interviewed BES staff, board, funders, and partners
- Surveyed alumni
- Ran a SWOT analysis

Strategy Proposals
- Invited strategy proposals from 12 BES sub-teams with ideas, goals, and related resources
- Interviewed each sub-team

Strategic Plan Development
- Reviewed strategy proposals and drafted initial strategic plan
- Iterated with feedback from all staff

Strategic Plan Refinement
- Gathered feedback from external stakeholders
- Revised plan based on staff and partner feedback

Launch!
- Board approved strategic plan in June 2023
- New plan launched July 1, 2023
build. excel. sustain.

The next five years.
MISSION

BES identifies and prepares excellent leaders to transform education in their communities.
Five Year Goals

The five-year strategic plan that follows is rooted in our commitments to community, anti-racism, and furthering equity through education. The plan centers on three primary goals that we believe best meet the needs of our community partners and the broader education ecosystem.

- **Incubation**: Fuel the creation of 50 new, high-quality, locally responsive charter schools in regions across the country.
- **Leadership Development**: Train at least 500 public school leaders through high-quality leadership development programming.
- **Sustainability**: Operate a thriving, sustainable, and equitable organization that contributes to a healthy national education sector.
Incubation

Fuel the creation of 50 new, high-quality, locally responsive charter schools in regions across the country.

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<td>1</td>
<td>Train</td>
<td>10-12 new leaders through the BES Fellowship annually; 50-60 over five years</td>
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<td>2</td>
<td>Coach</td>
<td>90% of authorized schools in their founding years through Follow On Support</td>
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<td>3</td>
<td>Support</td>
<td>at least two replicating leaders every year through the Build or Growth tracks</td>
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<td>4</td>
<td>Engage</td>
<td>at least two leaders outside of the Fellowship network in Follow On Support</td>
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<td>5</td>
<td>Authorize</td>
<td>75% of Fellows submitting high-quality applications, within two cycles</td>
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Through deep support in the Fellowship and Follow On Support, BES will prepare excellent, equity-minded, and community-driven leaders to found unique and responsive schools across the country.
### Strategies

Fuel the creation of 50 new, high-quality, locally responsive charter schools in regions across the country

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<th>CODIFY</th>
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<td>Fully codify and integrate our Fellowship and Follow On Support programs rooted in defined equitable and anti-racist school design principles</td>
<td>Pause smaller, more peripheral programs (e.g., incubating autonomous schools, executive search, school reviews) to focus on highest impact work</td>
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<td>Collaborate with local partners to collectively design and deliver a comprehensive suite of support that meets leader needs at all stages of school startup, maximizing success rates and optimizing Fellow experience</td>
<td>Implement actionable research to inform current programming and remain responsive to emergent sector needs (finance and facilities, innovative school models, emerging technologies, etc.)</td>
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Leadership Development

Train at least 500 public school leaders through high-quality leadership development programming

1. Expand
   reach of leadership development programming 3x by year five of the plan

2. Grow
   earned revenue at BES to 25% of annual operating budget by year five of the plan

3. Build
   a talent pipeline for school leaders at all levels and new school founders

4. Impact
   at least 85% of participating leaders with effective or highly effective programming

5. Prepare
   75% of leaders to take on heightened leadership roles within two years

Through yearlong coaching and bite-sized professional development, BES will prepare the next generation of leaders in public schools nationwide.
Strategies

Train at least 500 public school leaders through high-quality leadership development programming

CODIFY
Codify leadership development offerings, rooted in defined equitable and anti-racist school design principles, before scaling them effectively

EXTEND
Deepen the impact of LENS - our year long training and coaching program - by adding a second year of coaching for at least 25% of participants

INTEGRATE
Integrate LENS, Coaching, and Leadership Intensives to provide cohesive and customizable support to participants at all levels of school leadership

RECRUIT
Invest in significant new strategic and operational capacity to recruit potential partners, especially in the district market where BES has had limited reach to date
Sustainability

Operate a thriving, sustainable, and equitable organization that contributes to a healthy national education sector.

1. Grow our supporter base by diversifying funding and establishing and renewing partnerships.
2. Expand reach through strategic communications and regional alumni engagement.
3. Build operational, programmatic, and marketing capacity to support the work.
4. Invest in people and processes to create and sustain an inclusive and joyful culture.
5. Track and improve upon inclusion and retention metrics across the team.

Through strong financial management, strategic team growth, a continued focus on diversity, equity, and inclusion, and collaboration across the sector, BES will be positioned to thrive and sustain its work.
Strategies

Operate a thriving, sustainable, and equitable organization that contributes to a healthy national education sector

**OPTIMIZE**

Expand our team, optimize our organizational structure, and invest in critical new functions to improve operational efficiency, partnerships, marketing, and staff sustainability

**PRACTICE ANTI-RACISM**

Fully operationalize our commitment to anti-racism across all internal and external activities

**COLLABORATE**

Define and implement consistent management and communication practices to improve BES culture and collaboration

**SUSTAIN**

Expand and diversify our funder base, strengthen marketing and storytelling capacity, and increase earned revenue by scaling our leadership development programming
Get Involved

If you're inspired by this vision for the road ahead, let’s talk about how we can work together.

- learn more on our website bes.org
- find us on social media @besleadership
- email us at partners@bes.org