



PROPOSAL FOR:

## Portrait of a Graduate & Strategic Planning Services

**PRESENTED TO: NEWTON PUBLIC SCHOOLS, MA**

Date: March 6, 2023

**Battelle**  
for**Kids**

Realizing the power and  
promise of 21st century  
learning for every student

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## EXECUTIVE SUMMARY

Every school system is unique, but they are connected by a shared aspiration: that all students have an educational experience preparing them to be effective lifelong learners and contributors.

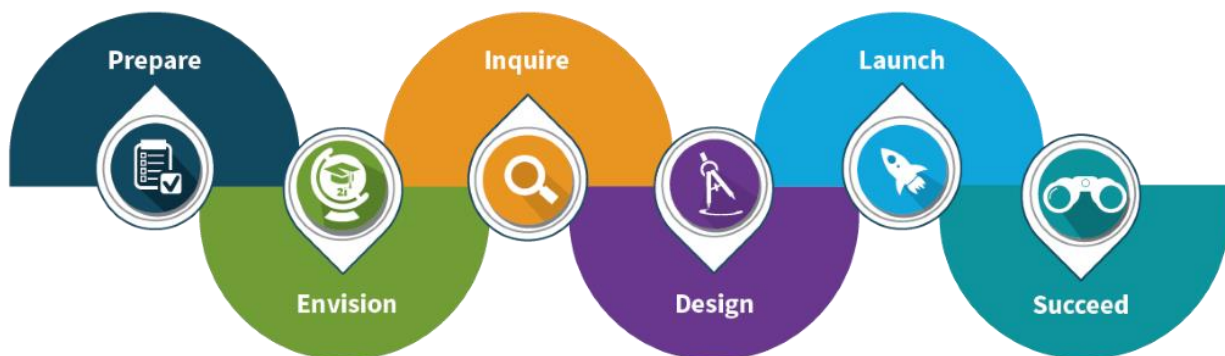
Now more than ever, that experience must not only provide for the acquisition of rigorous academic content, but it must also be more intentional about fostering critical thinking, communication, collaboration, creativity, and other 21<sup>st</sup> century skills our young people need to thrive in this complex, rapidly changing world.

Many school systems across the country have engaged the broader community in developing a strategic plan anchored by a collective vision that articulates the community's aspirations for its students in its Portrait of a Graduate.

Locally developed, but globally positioned, the Portrait of a Graduate serves as a North Star for system transformation. Providing strategic direction for the redesign of the overall educational experience for students, this collective vision reinvigorates and re-engages students, teachers, and community stakeholders by answering critical questions such as:

- What are the **hopes, aspirations, and dreams** that our community has for our young people?
- What are the **skills and habits of mind** that our children need for success in this rapidly changing and complex world?
- What are the **implications for the learning experiences** we provide in our school systems?

Battelle for Kids' strategic planning process is built around this central construct. The following proposal describes the six-phase process to develop a strategic plan that incorporates the development of a Portrait of a Graduate, is driven by community input, and elevates teacher and student voice.



# PORTRAIT OF A GRADUATE

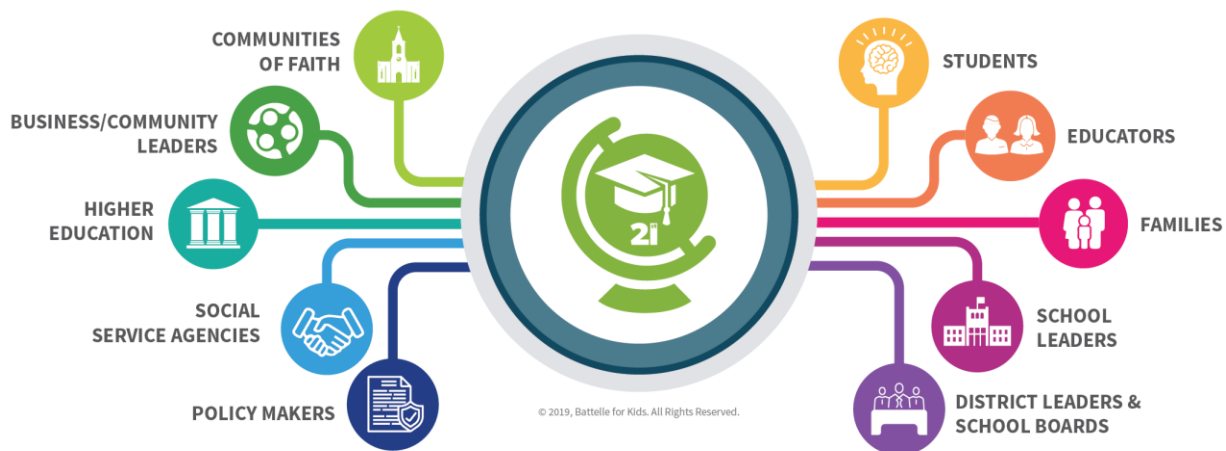


## Phase 1: Prepare

Since a good beginning predicts a good ending, the Prepare phase is critical to the plan's success by ensuring thoughtful community engagement and elevating the voice of teachers and students. The first meeting, the **Project Kickoff Meeting**, a 1-hour virtual meeting, will involve the core district planning team, and will set the stage for goals, expectations, and logistics for the Portrait of a Graduate & Strategic Planning process. BFK will review district expectations, conditions for success, engagement between BFK and district, key considerations for identifying and recruiting Design Team members, and communications strategies.

Once the stage is set and outstanding questions have been answered about the process, BFK will facilitate the **District Leadership Orientation Meeting**. During this 90-minute virtual meeting, BFK will ask the district leadership team to begin thinking about what will be different within the district as a result of this work. The district will be asked to consider system, leader, and instructional shifts that will need to occur, as well as a theory of action for implementation and acceleration.

The District Leadership Team will be responsible for shepherding the Portrait to success. With these leaders, we will review and commit to the district's expectations for success and develop an understanding of the conditions needed to get there.



During this part of the process, BFK will share an outline of the communications tools and supports provided to the district throughout the portrait and/or strategic planning process. BFK will provide an in-depth review of the **Communication Toolkit**, including invitation letters for Design Team members, website, and social media messaging, and talking points for the District Leadership Team for use with board, Design Team, and other community members.

Additionally, this phase initiates a series of **Coaching and Capacity Building** calls that will run through the duration of our engagement, to ensure status alignment and build capacity of district leaders to guide the planning process through to ultimate success. Depending on the

timeline of the engagement, this could be bi-weekly or monthly, but should include at least one call before and between each design team meeting.

Milestone/ Deliverable	Description	Est. Timeline
Project Kickoff Meeting	A <b>virtual</b> meeting designed to prepare the core project team to begin the prepare phase including goals, process, timing, composing the design team, decision points and other project considerations.	December 2023
District Leadership Orientation Meeting	A <b>virtual</b> meeting designed to provide a thorough understanding of the portrait and strategic planning process and implications for the system and stakeholders to the District Leadership Team	December 2023
Communications Toolkit	Talking points, invitation to Design Team members, meeting reminders, community vetting survey questions, thank you emails, and sample messaging for board members and district staff.	Ongoing
Coaching and Capacity Building	Ongoing virtual meetings with BFK and the district to review the overall strategic direction of the engagement and build district capacity. [Starting after the Leadership Orientation and continuing throughout the engagement.]	Ongoing - one meeting between each deliverable.

Note: All timelines can shift based on actual start date and ground-level realities.

## Phase 2: Envision

The Envision phase involves the development of a Portrait of a Graduate. This design process involves a sustained community conversation leading to a shared agreement on a unique community-owned picture of what graduates need for success. While every community and its school system are unique, the proposed four-meeting process below will guide this phase of developing your Portrait of a Graduate.



**Portrait Design Team Meeting #2:** BFK will facilitate discussion around what skills and mindsets our children need for success in this rapidly changing and complex world to address the shifts identified in Design Team Meeting #1 and support the district in prioritizing these for the district’s unique local context. Through a series of individual and group activities, the Design Team will begin to identify competencies for their Portrait. Design Team members will also share their creative inspiration to inform the graphic design of their Portrait visual.

**Portrait Design Team Meeting #3:** The third meeting focuses on converging on a set of Portrait competencies and contextualizing competency descriptions. Design Team members will also share their creative inspiration to inform the graphic design of their Portrait visual.

**Leadership Action Planning Meeting:** During this meeting, BFK will facilitate discussion with the district leadership team around next steps, including change management, communication, and support needs for the launch and implementation of their Portrait. The team will make final decisions about the Portrait components, and BFK will help prepare the leadership team to lead the final design team meeting.

During the district-led Portrait Design Team Meeting #4, the leadership team will present a draft designed Portrait with competencies and description statements. District Leadership will share any community feedback to augment the important work of the Portrait Design Team and to assist the team in finalizing the Portrait. The Design Team will discuss—through an activity facilitated by BFK—how to implement their Portrait and identify what success looks like.

Following the final design team meeting, BFK will develop a **Graphically Designed Portrait Visual**. Battelle for Kids will present 2-3 sketch visuals designed with community input and 2 rounds of adaptations. Additional rounds of edits will be charged at an hourly rate.

Milestone/ Deliverable	Description	Est. Timeline
Portrait Design Team Meeting #1 [Possible Onsite]	Facilitation of a two and a half hour meeting to kick off the Design Team work.	January 2024
Portrait Design Team Meeting #2 [Possible Onsite]	Facilitation of a two-hour meeting around necessary competencies and visual inspiration.	February 2024
Portrait Design Team Meeting #3 [Possible Onsite]	Facilitation of a two-hour meeting to reach consensus on competencies and description statements.	March 2024
Leadership Action Planning Meeting	Facilitation of a <b>virtual</b> meeting to finalize the recommended Portrait, prepare the district leadership team to lead Portrait Design Team Meeting #4, and revisit the conversation started in the first leadership team meeting regarding implementation implications for the system and stakeholders	March 2024
Graphically Designed Portrait Visual	2-3 sketch visuals designed with community input and 2 rounds of adaptations. Additional rounds of edits will be charged at an hourly rate.	February/March 2024



# STRATEGIC PLANNING

## Phase 3: Inquire

Once the collective vision for student success is identified as the Portrait of a Graduate, the District Leadership Team closely reviews its current state. At this point in the engagement, the Portrait Design Team becomes the Strategic Planning Design Team, unless the district opts for a different team configuration.

BFK will facilitate **Strategic Design Team Meeting #1** to gather additional input from Design Team members on the district's current state through a SWOT Analysis. To understand its current state further, BFK will provide tools to the district leadership team to complete an assessment of its system.

Framed by the district's analysis of its current state and by the envisioning process through Portrait of a Graduate, BFK will work with the district leadership team to align on the gaps between current and desired future states. The **Current State Analysis Report** will summarize the findings from the design team's SWOT Analysis, system assessments, and portrait implementation implications activity. The findings will guide the district's next steps and preview of considerations the district should address in the Launch Phase (managing change, building capacity, translating the Strategic Plan into learning and assessment frameworks, etc.).

The team will be supported with a **Communications Toolkit** and ongoing **Coaching and Capacity Building** calls.

Milestone/Deliverable	Description	Est. Timeline
Strategic Design Team Meeting #1 [Possible Onsite]	Facilitation of a two-hour meeting to collect qualitative perceptual data from Strategic Design Team members. This will include a SWOT Analysis and Portrait Implications discussion.	April 2024
Current State Analysis Report	Summary report of the proceedings to guide the district into its next steps. District may utilize the Battelle for Kids System Self-Assessment and Community Survey to include in this report.	May 2024
Communications Toolkit	Resources for communicating with internal and external stakeholder groups including: <ul style="list-style-type: none"><li>• Invitations to join Strategic Design Team</li><li>• Design Team Meeting reminders</li><li>• Follow-up and thank-you emails</li><li>• Strategic Plan launch planning</li></ul>	Ongoing

Coaching and Capacity Building	Ongoing virtual meetings with BFK and the district to review the overall strategic direction of the engagement and build district capacity.	Ongoing - one meeting between each deliverable.)
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## Phase 4: Design

The Design phase is focused on capturing input and reactions from key stakeholders on the unfolding components of the plan, and to begin writing the detailed plan. As the district welcomes many voices and elicits ongoing input, people will see themselves as part of a movement toward a shared vision of the district’s Portrait of a Graduate. This phase of the strategic planning process broadens the sources of input to the plan to transform the school system.



Based on the vision formed by the district’s Portrait and the findings from the Current State Analysis Report, BFK will share an outline of the unfolding priorities and goals with the district leadership team. The priority areas will be vetted during **Strategic Design Team Meeting #2**. Additionally, BFK will prepare the district for writing its plan by provide technical assistance and available resources for scaling district transformation, such as exemplar case studies from other districts, that will help district leadership develop goals and strategies for each priority area.

The unfolding priority areas and goals, along with the feedback provided by the design team, will set the district-led writing team up for success as they develop strategies within each goal and refine the plan. BFK will facilitate several **Writing Team Meetings** as the plan content takes shape.

**Strategic Design Team Meeting #3** will provide an opportunity for the Strategic Design Team to share their reactions and feedback to the draft components of the Strategic Plan.

To operationalize the Strategic Plan, BFK will also provide a year-to-year **Action Planning Template** to link the strategies and metrics outlined in the Strategic Plan with tactical efforts. Key district and school leadership can use the action planning template to begin drafting content with staff responsible for executing work plans to activate the Strategic Plan.

Following the third design team meeting, and after the district leadership team and school board finalize the plan copy/language, BFK will create a **Graphically Designed Strategic Plan**. BFK will present a plan sample, a full draft, and up to two rounds of adaptations. Additional rounds of edits will be charged at an hourly rate. This process will be complete 4-6 weeks after the completion of the strategic plan copy/language.

Continued counsel will be provided through the coaching and capacity building calls throughout the writing process. The BFK team will work with the district leadership team to assess progress, work through any specific issues, accelerate the writing process, and check that the draft strategic plan follows the direction set by the district’s Portrait of a Graduate.



Milestone/ Deliverable	Description	Est. Timeline
Strategic Design Team Meeting #2 [Possible Onsite]	Facilitation of a two-hour meeting with Strategic Design Team to vet the priority areas for strategic planning and gather feedback to develop goals and strategies.	June 2024
Writing Team Meetings	Leadership team or priority area leaders will draft SP and BFK will provide thought partnership. BFK and the writing team will meet several times to trade iterations of the unfolding plan.	Weekly – June 2024 & July 2024
Strategic Design Team Meeting #3 [Possible Onsite]	Facilitation of a two-hour meeting with Strategic Design Team to vet draft components of the Strategic Plan.	July 2024
Action Planning Template	Resource to link the strategies and metrics outlined in the Strategic Plan with tactical efforts.	July 2024
Graphically Designed Strategic Plan	A designed plan sample, a full draft, and up to two rounds of adaptations. Additional rounds of edits will be charged at an hourly rate.	August 2024

## Phase 5: Launch

The Launch phase is the moment when the plan truly comes to life. Everyone involved in creating the strategic plan should be enlisted as an ambassador to help tell the story about its inception and how it will frame the district’s work moving forward.



This phase will feature a **Leadership Action Planning Meeting**, focused on how to move the plan forward, leading and managing change, and how to deconstruct the district strategic plan with systemic coherence. This learning session will help to ensure the district is well equipped to implement and fully leverage the shared assets of the district and community.

Launch also means promoting the story behind the strategic plan, leveraging social media, website and signage updates, and other brand experience transformation inspired by the plan. The district will be responsible for the launch; to assist with this, BFK will provide, through the communications toolkit, internal and external communications recommendations, and guidance on the use of social media, websites, partners, and events as channels to reach all stakeholders.

Milestone/ Deliverable	Description	Est. Timeline
Leadership Action Planning Meeting	<b>Virtual</b> session with District Leadership Team, focused on how to move the plan forward, leading and managing change, and how to deconstruct the district strategic plan with systemic coherence.	August 2024

## Phase 6: Succeed



The successful plan requires successful implementation. BFK will schedule a virtual strategic plan status check six months after the launch to review successes and challenges and further support the district leadership’s success in putting the plan into action. During this meeting district leadership will share with the Design Team members progress to date on the goals outlined in their strategic plan.

These implementation status checks are recommended on an annual basis. Should the district wish additional support, BFK would be available.

Milestone/ Deliverable	Description	Est. Timeline
Status Check	Virtual session with District Leadership to discuss updates on activities to support the strategic plan	To be planned 6 months after completion

## Optional: EdLeader21 Membership

EdLeader21 is Battelle for Kids’ network of innovative school systems committed to the transformation of education, anchored in a renewed vision for student success in the 21st century—Portrait of a Graduate. Members have a shared vision: that each child experiences an education that purposefully integrates rigorous academic content with the skills and mindsets that empower students as lifelong learners and contributors in our ever-changing world.

**Member Experience Includes:**

- Access to the Member-Only Annual Event
- Superintendent Roundtables
- Capacity Building
  - Guides for Education Leaders
  - Leadership Roundtables
  - Spotlight Sessions
  - Virtual Site Visits
  - Study Groups
- Collaboration & Connection through our Member-Only Collaboration Platform

# COST OF SERVICES

Following are cost estimates for the services and solutions to support this engagement. Estimates are subject to change should the scope be modified.

<b>Total - Member Pricing</b>	<b>Onsite (where indicated)</b>	<b>Virtual</b>
<i>Portrait of a Graduate (Phases 1 &amp; 2)</i>	\$33,800	\$29,400
<i>Continuation of Strategic Planning (Phases 3-6)</i>	\$46,000	\$41,100
<i>EdLeader21 Membership (Annual membership fee - \$7,500)</i>	\$7,500	\$7,500
<b>Total (Member)</b>	<b>\$87,300</b>	<b>\$78,000</b>


<b>Total - Non-Member Pricing</b>	<b>Onsite (where indicated)</b>	<b>Virtual</b>
<i>Portrait of a Graduate (Phases 1 &amp; 2)</i>	\$37,500	\$32,500
<i>Continuation of Strategic Planning (Phases 3-6)</i>	\$51,300	\$46,400
<b>Total (Non-Member)</b>	<b>\$88,800</b>	<b>\$78,900</b>

## ABOUT BATTELLE FOR KIDS

Battelle for Kids (BFK) is a national not-for-profit organization committed to collaborating with school systems and communities to realize the power and promise of 21st century learning for every student.

Our team of experienced educators alongside communications, technology, and business professionals innovates and partners with school systems to offer an educational experience that prepares all students to become lifelong learners and contributors in an ever-changing world.

We advance our mission by strengthening the **coherence**, **capacity**, and **connections** school systems and communities need to redefine learner success and accelerate the design and implementation of 21st century learning systems for all students. A systems approach ensures equitable access to rigorous 21st century learning systems for every student, regardless of where they live, what school they attend, or to which classroom they are assigned.



Our approach involves the **entire school community**—educators in partnership with students, parents, businesses, and other community leaders—to ensure **enduring impact in schools**.

## TRAVEL RESTRICTIONS NOTICE

**Travel:** Battelle for Kids continues to closely monitor the COVID-19 pandemic and will continue to make decisions regarding the safety of staff and participants at our events and engagements based on the recommendations and guidelines from the Centers for Disease Control and Prevention (CDC), and other city, state and federal agencies. BFK will keep you updated regarding any relevant changes to our policies regarding staff travel that may affect this engagement.

**Virtual Option:** BFK has worked to create engaging experiences in a virtual setting that meet or exceed the engagement-level and outcomes from in-person activities. The proposal can be completed in a fully virtual engagement.