

SchoolWorks

Assessing Quality, Building Capacity

Overview

SchoolWorks, founded in 1998 and based in Southwick, Massachusetts, is an education consulting group with the mission of advancing all aspects of student learning and well-being by building the capacity of educators and educational institutions to assess, plan for, and achieve student success. With a foundation in assessment services, SchoolWorks has reviewed and documented the work of thousands of schools and districts since the company's inception in 1998 – developing and refining a proprietary set of research-based criteria (*SchoolWorks Quality Criteria*). With decades of insight into best practices across domains, SchoolWorks provides authoritative school improvement support by helping schools, districts, and states identify strengths and weaknesses, develop and execute meaningful and achievable action plans, and monitor ongoing progress. Our consulting services include: 1) accountability and authorizer supports; 2) quality reviews; 3) instructional supports; 4) leadership supports; and 5) school developer supports.

In 2013, SchoolWorks engaged in a long-term strategic planning process that has guided the work of the organization over the past nine years. The SchoolWorks Strategic Plan is a living document that articulates our Core and Cultural Values, our Purpose and BHAG, a rationale for SchoolWorks strategic direction, as well as the long-term actions, key thrusts and capacities, and key initiatives that will lead to SchoolWorks ongoing success through June 2023. While long-term actions provide broad direction for achieving success, the key thrusts and capacities provide a more refined statement of what the organization will do over a 3–5-year timeline. Key initiatives are updated annually to guide achievement of the key thrusts and capacities. Our team meets regularly to report on and discuss progress across the key initiatives.

As the organization approaches its 25th anniversary in 2023, we are excited to celebrate our past accomplishments and set ourselves up for another 25 years of organizational impact and success. In 2022, the world looks very different than it did when we completed our last 10-year strategic plan. We have emerged from a pandemic, and cultural conditions must be revisited to ensure that SchoolWorks strategy remains competitive and relevant in a new era.

Service Needed: Facilitation of Strategic Planning Retreat

SchoolWorks approaches strategic planning work as a collaborative effort that benefits from the input and contributions of its staff. In the summer of 2018, the organization updated its key thrusts and capacities, and in 2019, the team worked together to finalize our key initiatives and identify a plan to achieve those initiatives in successive years. Annual plans to achieve key initiatives have been formulated and executed upon by work groups whose membership consists of staff members and consultants, absent an external facilitator.

At this juncture, we are looking for third-party facilitation of a process that will result in a 10-year strategic plan to set our organization up for continued success. The right facilitator will support the organization in achieving the appropriate balance between challenging our internal assumptions and biases with new ideas

while remaining faithful to our mission and core and cultural values. In addition, an external facilitator will support the team by bringing additional capacity and expertise to this work during one of the organization's biannual busy seasons.

Scope of Work

SchoolWorks seeks an external facilitator to lead our next 10-year strategic planning process between January and June 2023. The process must be inclusive of all of SchoolWorks stakeholders, including opportunities to gather data and iterative feedback from SchoolWorks three Leadership Team members, Managing Directors (5), Business and Operations Team (3¹), key consultants, and clients and partners (TBD).²

Key Assumptions

- A fully transparent and inclusive process will be utilized to gather input for plan development.
- SchoolWorks mission will serve as the basis for plan development.
- The timeline will be from January -- June 2023, with a public dissemination of key aspects of the plan in mid-July 2023.
- The process will begin with a discovery session(s) with key and representative members of the SchoolWorks team.
- The process will include an evidence collection phase resulting in an updated needs assessment, gap analysis, SWOT analysis, and market analysis to inform the plan. The evidence collection phase should include input, feedback, and data collected from a myriad of SchoolWorks stakeholders. Evidence collected during this phase will be made available to SchoolWorks as a written deliverable.
- The facilitator will include opportunities to discuss the emerging impact of goals and objectives on SchoolWorks with the Leadership Team, including financial, systemic, and human resources that may require expansion or adjustment over the course of the plan's implementation.
- The final Strategic Plan deliverable will include a fully editable ten-year strategic plan (in Word format) built around the SchoolWorks mission. The plan document will reference organizational values, and include objectives and related key performance indicators for Years 1, 5, and 10, as well as any other framing and foundational components required as part of the proposed process, and will allow the internal team to create successive annual plans to support and ensure implementation.
- An additional written deliverable will include a PowerPoint presentation to assist the SchoolWorks team in sharing key aspects of the plan.
- All intellectual property will become the property of SchoolWorks. All data will remain the sole property of SchoolWorks. The selected party will agree to keep information related to any and all discussions and agreements with SchoolWorks in strict confidence, including but not limited to the

¹ SchoolWorks is in the process of hiring one additional staff member for this team.

²² SchoolWorks has additional employees that work exclusively in service of a contract with the MA Department of Elementary and Secondary Education. Due to the nature of the partnership, they will not participate in this process.

terms of the contract and any confidential business information or proprietary information learned through its dealings with SchoolWorks.

Proposal Requirements

Interested parties are requested to submit a proposal that includes the following components:

- An introduction that summarizes the proposer's interest in the project and highlights relevant experience and expertise
- An overview of the facilitator's planned approach to the strategic planning process, as well as a rationale for the specified approach
- A summary of any pre-work that would need to be completed by SchoolWorks staff, as well as a summary of commitments required of the SchoolWorks staff
- A list of any organizational documents the proposer would like to review in advance of launching the strategic planning process
- A proposed timeline for completing the scope of work
- Three references for similar projects
- A sample plan completed by the respondent from a similarly sized organization
- Evidence of certification as a WBE or MBE with the Massachusetts Supplier Diversity Office, if applicable
- A cost proposal that includes planning and preparation, facilitation, and follow-up work (SchoolWorks will make all travel arrangements on behalf of the facilitator, and reimburse all expenses in alignment with the SchoolWorks Expense Reimbursement Policy)

Proposals are due via email to Kim Perron (kperron@schoolworks.org) no later than 5 pm ET on November 30, 2022.