

**Social Impact Exchange Business Plan Competition
Submitted by Higher Achievement**

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I. EXECUTIVE SUMMARY

At a time when large numbers of U.S. children –almost 14 million--and families suffer in under-resourced, low-performing schools, especially in urban areas, out-of-school time (OST) programs have been expected to strengthen their educational focus and collaboration with schools in order to raise academic achievement. Logically, these programs should produce academic results because they provide additional instruction time and opportunities to practice skills learned in school. Nonetheless, many evaluated OST programs for disadvantaged students have a poor record of academic impacts.¹ In fact, results have been so limited that a number of researchers have gone beyond criticizing the quality of particular models and the effectiveness of implementation to raise the fundamental question of whether the voluntary, social nature of after-school programs inhibits learning.²

Higher Achievement provides a rigorous after-school and summer academic program that gives youth from at-risk communities their best opportunity to succeed in middle school – and in life. For over 35 years Higher Achievement’s outcomes prove that high quality academic opportunities, presented at the right time - middle school, can make the difference between a child dropping out of high school or becoming a college bound scholar.

An investment in the replication of the Higher Achievement model will produce *programmatic*, *expansion*, and *research* outcomes that address the urgent need for: a) OST programming that delivers academic results as well as positive youth development; and b) evidence-based research that can guide the development of policy and new academic OST models and programs.

First, the investment will enable Higher Achievement to bring the results its centers have already demonstrated in Washington, D.C. and Alexandria, Virginia to more urban middle school students - potentially 500 or more students annually in centers in Baltimore, MD, Richmond, Virginia, and Pittsburgh, PA - as well as 100 students annually in a new Ward 8 Center in Washington, D.C.

Second, an investment will enable Higher Achievement to complete the build-out of core expansion infrastructure to maintain Higher Achievement’s culture and quality standards when Higher Achievement affiliates begin to expand the scope of activities after 2012, reaching almost 4,000 middle-school students across 10 communities by 2018.

¹ See, for example, the 21st Century Learning Centers evaluation by Dynarski et al, 2002; Walker and Arbreton, 2003; Cooper 2001; Cooper, Lindsay, Nye and Greathouse, 1998; and Kralovec and Buell, 2000.

² See, for example, Dynarski et al, 2003; Grossman et al, 2002; and Walker and Arbreton, 2003.

II. INDUSTRY AND MARKET ANALYSIS

Market Context and Need

The Problem: *The Middle School Achievement Crisis in Disadvantaged, Urban Communities*

Research from across the nation consistently shows middle school to be a time of extraordinary risk for children. Grades and test scores plummet during the elementary to middle school transition and continue to decline through 8th grade; students begin to disengage from family and school and experiment with unhealthy behaviors; school attendance drops, and violence increases. This middle school “achievement dip” exists nearly everywhere in the U.S. However, the decline is more pronounced in low-income communities where supports that can reverse this downward spiral are absent: quality schools, quality out-of-school programs, positive role models, and a culture that values academic achievement.

The facts are staggering: 1.2 million U.S. high school students drop out every year,³ with more dropping out in 9th grade than any other grade.⁴ A recent study showed that eighth-graders in Philadelphia who failed math or English had at least a 75 percent chance of dropping out of high school.⁵ And the drop-outs who “disappear from the educational pipeline”⁶ are disproportionately urban, minority youth.

Higher Achievement is a rigorous, year-round academic enrichment program targeting middle-school children grades 5th – 8th from disadvantaged urban communities. The program closes a persistent achievement gap caused by gross educational inequities in many U.S. communities. It does this by providing intense academic training and tangible academic opportunities within a culture of strong relationships and achievement during the most critical time in a child’s life: middle school.

Current and Projected Demand

In both the not-for-profit and for-profit sectors, history provides examples of corporate expansions that have failed, consuming resources that could have been dedicated to other purposes. Yet there is no doubt that the problem Higher Achievement seeks to address, **the middle school achievement crisis in disadvantaged, urban communities**, is urgent, and no other OST program is addressing it with the results that Higher Achievement has attained.

U.S. communities need and want dynamic OST programs that can produce academic results for disadvantaged students, as evidenced by the willingness of District of Columbia, Alexandria

³ *Cities in Crisis: A Special Analytic Report on High School Graduation*. America’s Promise Alliance, 2008.

⁴ <http://www.edweek.org/rc/articles/2007/10/03/sow1003.h27.html>

⁵ Neild, R., & Balfanz, R. *Unfulfilled Promise: The Dimensions and Characteristics of Philadelphia’s Drop-Out Crisis*. Philadelphia Youth Network, The Johns Hopkins University, and University of Pennsylvania, 2006.

⁶ *LOSING OUR FUTURE: How Minority Youth Are Being Left Behind by the Graduation Rate Crisis*. Urban Institute, 2004. http://www.urban.org/UploadedPDF/410936_LosingOurFuture.pdf

(VA), and Baltimore (MD) public schools to form partnerships with Higher Achievement. A 2006 expansion feasibility study conducted for Higher Achievement by Bridgespan showed, in fact, that Higher Achievement's model was needed *and* likely to be successful in 14 of the 23 communities studied--***including Baltimore, MD; Richmond, VA; and Pittsburgh, PA.***⁷

In Richmond, for example, 75% of the 24,000 students in the Richmond Public Schools are economically disadvantaged.⁸ They also face serious educational disadvantages, as evidenced by:

- **Academic Achievement:** In 2007-08, math SOL (Standard of Learning) test scores declined by 17% between the 5th and 8th grades. In reading, SOL test scores declined by 18%.
- **Advanced Programs:** Only 4.2% of Richmond Public School students are enrolled in advanced placement courses.
- **Graduation Rates:** Richmond Public Schools had a 54% graduation rate for 2006-07, with lower rates among blacks and particularly Hispanics.
- **High-School Dropouts**⁹: 24.8% of the Richmond population over age 25 are not high school graduates.
- **Absence from School**¹⁰: 14% of Richmond Public School students missed 10 or more days of school in 2005-06.
- **Violence:** Richmond Public Schools had over 22,000 "disorderly or disruptive behavior offenses" in 2006-07, an average of nearly one per child enrolled.¹¹

Higher Achievement's capacity to raise individual and school performance, and to create a "culture of achievement" through a critical mass of program graduates would provide Richmond with a critical lever for reversing this academic decline.

At the same time, by expanding at a national level, Higher Achievement can catalyze the interest in "higher achievement" among the diverse sectors of *many* communities--mobilizing thousands of volunteer mentors, collaborating with hundreds of schools, and partnering effectively with private entities across the U.S. committed to making their schools and communities strong. This is the reason that two institutions invested \$3.6 million in national expansion capacity-building for Higher Achievement. This funding has permitted extensive research of expansion models and careful planning that have made Higher Achievement confident about pursuing the course of expansion.

⁷ Screening criteria included absence of strong academic programs addressing the needs of low-income middle schoolers, demographic factors such as the extent of neighborhood segregation, location and size of city middle schools, top high school placement opportunities, potential for partner and public support and other factors.

⁸ Economically disadvantaged is defined as eligible for free and reduced meals.
http://www.richmond.k12.va.us/indexnew/sub/statistics/freelunches05_06.cfm

⁹ U.S. Census 2000: <http://quickfacts.census.gov/qfd/states/51/5167000.html>

¹⁰ <http://www.richmond.k12.va.us/indexnew/sub/statistics/truancyrates.cfm>

¹¹ <https://p1pe.doe.virginia.gov/reportcard/report.do?division=123&schoolName=All>

Ecosystem Analysis

Given Higher Achievement's longevity and success in Washington, DC, its ecosystem reflects this specific geographic region. (Appendix E). Several conclusions can be drawn from looking at the current ecosystem map:

1. The program impacts far more beneficiaries than just scholars. For example, by increasing the number of scholars who successfully gain the academic attitudes and leadership skills necessary to be successful in school and in life, the cycle of poverty can be broken and thus, a family is affected; better prepared students affect the culture and achievement of high schools; businesses have access to a stronger workforce; and dollars flowing into school districts increase as test scores and recognition go up.
2. Those who benefit from the program also provide many of the critical resources – making this connection for those providers will result in sustainability.
3. Current bystanders present an opportunity to strengthen the entire ecosystem.
4. Due to the volatility in the local political environment, having numerous champions beyond the school district is imperative.
5. Due to aggressive reform efforts at the federal political level there is a need to frequently conduct a SWOT analysis and to identify programmatic changes that might need to be made to remain relevant.
6. To prevent mission creep yet impact the entire system, strong ties and support of allies are essential.

III. STRATEGY AND THEORY OF CHANGE – THE SOLUTION

Mission

Higher Achievement's mission is to develop academic skills, behaviors, and attitudes in motivated yet under-served middle school children, "scholars," to improve their grades, standardized test scores, attendance, and the opportunity to attend top college preparatory high schools. Higher Achievement helps under-represented youth transition successfully through middle school and places them in high school programs that get them on track to college. Higher Achievement's objectives are:

- To improve student academic achievement: grades, standardized test scores, attendance.
- To transition youth successfully through the critical middle school years, building confidence, leadership, and critical thinking skills for the future.
- To send all Higher Achievement graduates to college-preparatory high school programs.

At the same time, Higher Achievement strives to develop youth positively as leaders, teach the value of hard work for academic gain, advance graduates on to four-year colleges and

universities, and set young people on a path to achievement that continues throughout their lives.

Higher Achievement also recognizes that its programs generate outcomes beyond individual scholars--within schools and school systems, families, and community. A set of secondary objectives, *built upon the foundation of scholar achievement*, inform replication and expansion strategies. These are:

- To impact **school cultures and systems** positively from within by fostering a culture of achievement led by a critical mass of scholars.
- To support **families**, including those who are struggling, by increasing young people's self-motivation and access to other community resources, mentors, and role models.
- To strengthen **community** by providing a supportive environment for friendships and relationships within and across generations to grow.

History

Founded in 1975 at Gonzaga High School by a young teacher named Greg Gannon, Higher Achievement evolved over the years and became its own incorporated 501(c) 3 in the early 1980's. In 1999, the organization reorganized as an outcome-based program to improve academic achievement for disadvantaged middle school children. For more than 30 years, Higher Achievement has impacted the lives of thousands of young people placing them on a path to success in both school and in life.

Theory of Change

Higher Achievement's model of high expectations and high support creates a positive cycle of change and achievement: Increased academic opportunity leads to increased interest, which gives way to increased effort, which produces greater academic success. Academic success leads to additional opportunities, and the virtuous cycle continues (see illustration 1).

Logic Model

Higher Achievement's theory of change is a 30,000-foot view of a well-defined and detailed logic model. (Appendix F).

Programmatic inputs (increased opportunities) consists of: highly trained, dedicated mentors; a culture of high expectations; academically rigorous curricula; additional time on academic tasks through an after-school and summer academy; exposure to college through university stays; exposure to cultural and community events; and top high school placement services. Outputs (increased academic interest and effort) consist of: a four-year commitment to the program; participation in 190 hours of small group and classroom instruction, 112 hours of supervised homework, and 99 hours of elective and leadership activities. Outcomes (increased academic achievement)

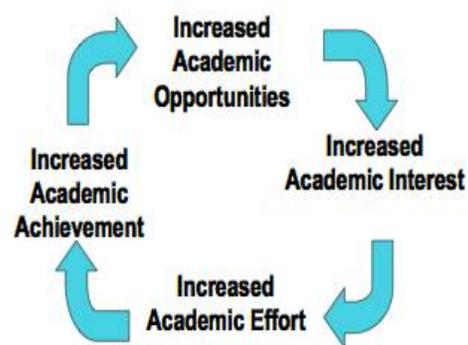


Illustration 1: Theory of Change

consist of: improved standardized test scores; improved grades; improved attendance; and improved behaviors and attitudes towards academics. **The impact: children from at-risk communities become college bound scholars.**

IV. CURRENT OPERATING/PROGAM MODEL

Description of the Program

The Higher Achievement model showers children with academic opportunities—three academic mentors per scholar, an accelerated, hands-on curriculum centered on social justice themes, university stays, academic contests, and top school placement and scholarships. Daily rituals like debating the quote of the week and “lifting chins” as scholars speak promote an organization-wide culture of prizing intellectual curiosity, self-confidence, and long-term academic commitment. The program model consists of three components: Summer Academy, After-School Academy and High School Placement.

Summer Academy

The six-week summer program operates from 8:00 a.m. - 4:00 p.m. five days a week. Students attend four academic classes a day in math, science, social studies, and literature, in addition to two cultural/artistic electives. All curricula follow an accelerated version of the standards for learning, include an experiential and/or simulation approach, and incorporate themes of social justice. Academic contests include Olympics of the Mind and Spirit Day. All students participate in a three-day, overnight college trip, visiting campuses such as Pennsylvania State University and the University of Maryland.

After-School Academy

The 25-week after-school program offers academic enrichment activities three days a week from 3:30 p.m. - 8:00 p.m. Scholars are teamed with three academic mentors (one for each subject) for two hours of class work per day in math, literature, and a supplemental seminar each week such as technology applications, creative writing, and organizational skills building. In addition, Centers have homework help, dinner, elective studios, and monthly field trips or events. Academic contests include: spelling bee, literary love poetry contest, and ambassador debate.

High School Placement

The High School Placement Program helps scholars identify and pursue accelerated middle and high school programs that will continue to challenge them academically and prepare them for success in college. Higher Achievement offers SSAT preparation classes and exams, application and financial aid workshops, school visits, and highly individualized support to families as they navigate the admissions process.

Core Elements and Success Factors

The Higher Achievement model consists of dozens of components ranging from how to conduct homework help to incorporating social justice themes to dosage. However, consistent with the

logic model there are six core elements: mentoring, high expectations, academically rigorous curricula, year-round instruction, bridging the transition to high school, and remaining outcomes focused. These and ALL program components are research-based. (Appendix C).

Evidence of Results

Higher Achievement centers are situated in schools in under-resourced neighborhoods--which Higher Achievement then transforms into dynamic communities of learning through its custom, standards-based curriculum and activation of community assets and partnerships. Scholars simulate the United Nations Special Counsel debate on education, measure the carbon dioxide in a running tail pipe, and work with committed mentors who often see their scholars through all four years of the program, gaining experiences that increase confidence and achievement, heighten cultural awareness, and reinforce their own commitments. At a point in students' lives when grades and test scores usually decline, the 650 hours of annual programming yields results. In the 2007-2008 school year:

- 66 % of scholars improved their math grade one whole grade or better.
- 55% of scholars improved their reading grade one whole grade or better.
- 100% improved standardized test scores in DC. The average rate of improvement was a remarkable 20% in both math and reading.
- 100% of scholars placed into college preparatory high schools.

V. ORGANIZATION

Organization Structure and Governance

Higher Achievement is a “wholly-owned model” of local affiliates expanding under a single 501c3 umbrella. This model permits strong control of organizational culture, ensures program quality, and allows for consolidating costs. The National office, based in Washington, DC, largely assumes the back-end administrative responsibilities of all affiliates (i.e. finance and human resources), oversees development activities, and ensures program fidelity across affiliates. Lastly, the National office is responsible for expansion strategy and roll-out and plays an advocacy role at the federal and state levels.

Higher Achievement is governed by a Board of Directors that has fiduciary responsibility over the organization. President's Councils are made-up of local, influential individuals who act as a group of advisors and resources to affiliate Executive Directors. The President's Councils have no legal or fiduciary responsibility, however, a minimum of one member is elected to the Board of Directors.

Current Size and Reach

Currently, Higher Achievement has two affiliates: DC Metro and Baltimore. DC Metro has five Achievement Centers and serves 400 scholars. Baltimore has two Achievement Centers and serves 100 scholars.

Management Team

The management team consists of the Chief Executive Officer, Richard Tagle, Chief of Staff, Kathryn Stephens Beisel, Chief of Programs, Rachel Gwaltney, Chief of Development and Communication, Nicole Levine, DC Metro Executive Director, Lynsey Wood-Jeffries, and Baltimore Executive Director, Erin Hodge-Williams. (Appendix A).

Higher Achievement allocates ten percent of an employee's salary to professional development every year. The goal is to both retain talent and cultivate depth of leadership. In fact, on the leadership team, the average tenure is six years (excluding positions established due to expansion - Baltimore Executive Director and the Chief Development Officer). Thus, while a board approved succession plan is in place to address any short-term gaps in leadership, the organization also works towards cultivating employees who are qualified to permanently move into leadership positions, including the role of Chief Executive Officer.

VI. SCALING PLAN¹²

Description of Scaling Plan and Type

Scaling Strategies

Strategies to increase the number of youth served include both going deeper in current markets and expanding through a wholly-owned affiliate (or branch) structure. The decision to go deeper in DC Metro is relatively new (FY10). Assumptions were made about the external environment that the original scaling plan was based on, but are no longer valid. For example, local education leadership has changed, high schools have been strengthened, institutional and corporate funders have mobilized around a local education agenda, federal education leadership has changed, etc.

Higher Achievement is a learning organization and dedicated time is allocated throughout the year for debriefing and reflection. While the goal of serving more youth does not change, annual strategies reflect information gleaned from review of the changing landscape (education, economic, funding, etc.). Scaling through going deeper is a reflection of this process.

Understanding that there are a variety of factors limiting Higher Achievement's growth in any one community, the organization has also made the decision, and invested in a structure, to allow for geographic expansion. Geographic expansion under a "wholly-owned" affiliate structure allows the organization to continue to meet its goal of serving more youth even when a market matures. The structure allows for centralized functions which significantly reduce start-up costs, leverages talent across regions and maintains program fidelity.

¹² Higher Achievement began expansion activities in 2008 after receiving an investment from Atlantic Philanthropies; thus, plans described in this section span the last three years in addition to talking about future activities. Financial models, goals and commitments, however, are inclusive of FY10 forward (e.g. neither expenses nor commitments made to cover those expenses from FY08-FY09 are included).

Target Market

Higher Achievement's target market are rising fifth- and sixth-grade middle school students, whom remain in the program through their eighth grade year, from under-resourced and disadvantaged communities. Key metrics guiding areas where Higher Achievement locates its centers and recruits from are:

- Percent of 8th graders who have met or exceeded state standards in English and Math
- Absentee rates for elementary and middle schools
- Free and Reduce Meal Rate (FARM)
- Number of Title I schools
- Neighborhood income demographics
- High school graduation rate
- College attainment rate

Competitive Advantage/Barriers to Entry

Higher Achievement has several competitive advantages including: 35+ years of experience; quantifiable outcomes; demonstrated success working with school systems and schools; strong and deep relationships with local and national funders interested in seeing the program replicated; and a niche focus on academics in an out-of-school time setting. More importantly, a list of core criteria must be met before Higher Achievement will consider expansion to a new city (see "Key Success Factors") thereby ensuring an environment conducive to success.

Barriers to entry result when market demand, college preparatory high school placement slots, human resources and talent, financial resources, and/or political will are lacking, or when there is competition and/or transportation and safety issues. Higher Achievement has a series of questions it asks itself during the due diligence process to adequately assess whether or not a city is conducive to success.

(1) Need

- What percent of 8th graders met or exceeded state standards for English and Math?
- What are the absentee rates for elementary and middle schools?
- How many middle-school youth qualify for Free and Reduced Meals (FARM)?
- How many Title I schools are in the district?
- What are the neighborhood income demographics?
- What is the high school graduation rate?
- What is the college attainment rate?

(2) Market

- What percentage of middle-school students are currently engaged in after-school activities?
- Are there waiting lists for after-school programs
- What is the school district's requirement around out-of-school time participation?

- (3) High School Placement Potential
- Are there enough slots in college prep high schools for a fully scaled Higher Achievement?
 - If not, is the city and/or other organizations investing in high school reform?
- (4) Human Resources and Talent
- Are there large corporations and/or universities from where to recruit mentors?
 - Does the city/state demonstrate a commitment to volunteerism?
 - Is there a talent pool from which to recruit staff?
 - Are there major donors actively involved in like organizations?
- (5) Financial Resources
- Is the city a focus of any national funding?
 - What is the community foundation's records for funding education initiatives
 - Does the city contain significant local philanthropists?
 - Does the state receive 21st Century Community Leader Center money
Are Supplemental Education Services money available?
 - What are the average revenues of similar organizations in the city?
 - Are there nonprofits with a history of longevity in the city?
 - Is there a high-functioning pass-through of federal dollars?
- (6) Geography, Transportation and Safety
- Where are the host schools in relation to feeder schools?
 - Are students bused to after-school activities by the city?
- (7) Political Will
- Is there an education reform agenda that is aggressively being pursued?
 - Are parents mobilizing to demand changes?
 - Is the superintendent effective?
 - Is the local government effective?
 - Is there stability in the local political community?
 - What is the Mayor's education agenda?
 - What is the Governor's education agenda?
 - Are there State Congress people with seats on the federal HELP committees?
- (8) Competition
- What other organizations are serving middle-school youth?
 - Do school have an extended learning day?
- (9) Special Assets
- Higher Achievement existing connections to and knowledge of local community
 - Reasonable access from DC for staff to access, trainings, relationship building
 - Field trip and college trip opportunities

Key Success Factors and Risks

Higher Achievement has identified the following as key success factors that must be met before expanding into a new city:

- (1) **Schools:** Outward support of the Public Schools as defined by the superintendent's willingness to pledge and sign an MOU with Higher Achievement.
- (2) **Funding:** The opportunity for sustainable local funding. Specifically, Higher Achievement needs to see that local champions (e.g., corporations, philanthropists, local foundations) are willing to support Higher Achievement and that potential exists for a fee-for-service public revenue stream (e.g., Supplemental Educational Services (SES), line item in state budget, etc.).
- (3) **Limited competition:** Higher Achievement will not enter a community if the need is already being addressed.
- (4) **Community engagement:** Community organizations and entities willing to partner with Higher Achievement to offer programs and services that supplement the academic enrichment provided. Are there parent empowerment programs that can help build parent understanding of academic standards? Programs to support family needs? Are there athletic, artistic, and non-academic OST programs that scholars can attend when not at Higher Achievement? Are there programs that can help provide electives during Higher Achievement's studio time (5-6 p.m. during After School Academy)?

At the same time, Higher Achievement has been careful to mitigate risks inherent in expansion. The four essential cornerstones for success and viability are to:

- Ensure local Buy-In
- Secure long-term sustainable funding
- Maintain high quality program operations
- Sustain program stability even when operating within unstable public schools systems

Local Buy-In: Replicating organizations can be marginalized by local constituents if it is felt that their work is pressed upon them or that they (the local constituents) were not able to guide the replication. By engaging established leaders and building strong local relationships with the superintendent, community leaders, local funders, principals, and other individuals, we mitigate this risk. Higher Achievement is strategically building local commitment to the program with its targeted "pull" strategy using formal feasibility studies, local champions, a local advisory group, and local hires. It will sustain this buy-in by creating representation for local advisory groups on the Higher Achievement National Board.

Sustainable Funding: Another potential risk for Higher Achievement is failing to raise local sustainable funding. Achieving multi-year financial commitments and building a sustainable funding model is critical. Higher Achievement builds sustainable funding by investing in partnerships with local funders; focusing efforts on attaining per-student, scalable funding through government-funded programs like SES and TANF; and seeking line-item funding from local municipal sources. Higher Achievement's national office will leverage three years of seed funding (from national and local sources) to enable the local office to develop a successful local

fundraising effort that is able to secure increasing revenues until it covers 100% of its costs with local dollars. Higher Achievement's advance team works with the local investors and national partners to secure 3 years of seed funding to allow the new affiliate adequate time to evolve the local funding relationships and to focus on building and delivering quality programs in its first year.

Maintain Quality: Managing the high quality of the program beyond the Washington, D.C. region is also critical to sustainability. Higher Achievement elected to adopt a wholly owned business model to manage and ensure quality program replication. It has also invested deeply in a thoughtful change plan that invests in quality and capacity first. Additionally, it has structured a national position focused on evaluation and quality and another on curricula and training, to provide regular program tracking, assessment, and training as appropriate. National will take immediate action if regular evaluations, such as the bi-annual 360-degree evaluations, indicate that quality standards are not being met.

Unstable School Systems: A potential risk for Higher Achievement is the instability of public school districts in high poverty urban areas: from short-term superintendents¹³ to regular principal turn-over, relationships need to be constantly developed and shepherded. Higher Achievement's experience operating in Washington, D.C. for more than 30 years provides useful training on managing this instability. Higher Achievement will build local partnerships with diverse political, social, educational, and community-based entities to leverage public will to benefit the organization thereby lending greater operating consistency and program resiliency despite instability within the public schools. A memorandum of understanding with the school system is required before entering a new community.

Given the careful plan for building the organization's replication capacity and enthusiastic responses from funders and practitioners, Higher Achievement has found these risks to be manageable. With the completion of the build-out in Phase I of expansion, Higher Achievement will be able to focus on empowering and equipping a growing number of affiliates to successfully produce these program outcomes for new scholars in new communities in Phase II.

Timetable, Milestones, and Measurable Three-Year Performance Goals

Higher Achievement has developed a thoughtful, two-phase expansion plan to serve more scholars:

Phase I (2008-2012): Investment in Infrastructure, Launch "Pilot Expansion" Sites

Higher Achievement's goal for Phase I is to expand programming strategically on a limited basis – pilot expansion sites - while incorporating lessons learned into the organization's operations and future expansion plans. During Phase I, Higher Achievement will continue scaling DC Metro

¹³ National School Boards Association
<http://www.nsba.org/site/doc.asp?TRACKID=&VID=2&CID=425&DID=5470>

operations, scale operations in Baltimore, and open one new affiliate in 2011, increasing the number of scholars to 1,100--almost triple the number in 2008.

Phase I Expansion Milestones: Numbers of Scholars Served

Number of Scholars	2008	2009	2010	2011	2012
DC Metro	400	400	495	525 ¹⁴	540
Baltimore		120	160	270	300
Richmond				120	160
Affiliate 4					120
Total	400	520	655	915	1,120

Timeframe: September 2008 – August 2012

Also during Phase I, Higher Achievement will complete the build-out of core infrastructure. Specifically, these activities include: upgrade and centralize technology, data, training, development and other infrastructure to enable affiliates to rapidly form and bring programming to scale cost-efficiently during Phase II of expansion (2012-2018)¹⁵.

With three-year grants from The Atlantic Philanthropies and Jack Kent Cooke Foundation, Higher Achievement began planning and preparing for expansion activities in 2008. **The goal: to serve more scholars while maintaining program fidelity resulting in high scholar outcomes.** To that end, planning and upgrades focused on strengthening the program, codifying the model and developing a training plan, improving systems and processes, building the team, and building communications. As a result, the following has been accomplished or is scheduled to be accomplished (in italics):

Phase I Expansion Milestones: Capacity Building

(1) Strengthen the Program

- Core program (non-negotiable) components identified and documented. This tool is used for staff on-boarding and training. (Appendix C).
- Key performance indicators identified, target outcomes established and dashboards created to track programmatic results. The dashboard contains three views: program, management and board. Each is used to focus every member of the organization on the same end results. Goals from the dashboard are embedded in individual work plans. (Appendix G).
- Feedback from the Public/Private Ventures longitudinal study incorporated and documented.

¹⁴ Affiliates are considered to be “fully scaled” when they reach 500 scholars, at which point they should be able to provide programming at a per scholar cost of \$4,500. Where enough mentors, potential scholars, and school sites are available, affiliates can elect to expand beyond 500 scholars, as is Higher Achievement DC Metro’s plan in 2011.

¹⁵ Phase II of expansion is more simple in that it focuses purely on the more rapid rolling out of new cities and going to scale in current sites. Phase II goals can be viewed in Appendix D: Sustainability Model. There, one can find total scholars served and revenue goals. Key performance indicators and outcomes do not change in Phase II.

- *Incorporate, document and disseminate results from the Public/Private Ventures longitudinal study (Delivery Date: FY13)*
- (2) Codify the Model and Develop a Training Plan
- Curriculum reviewed, revised, and copyrighted.
 - *Enhance curriculum with stronger themes of social justice and packaged in a manner that allows for individualization (Delivery Date: FY11-12)*
 - Centralized training and professional development with an emphasis on ensuring staff has a strong research knowledge of and ability to implement the latest youth development best practices.
 - Enhanced culture document reflecting organizational principals, values and behaviors
 - *Enhance training for mentors (Delivery Date: FY11)*
- (3) Improve Systems and Processes
- Integrated System for Information Sharing (ISIS) upgraded. Web-based tool used to track and report on all programmatic information including: mentor and scholar contact information, baseline data, test scores, grades, attendance, and qualitative feedback.
 - Upgraded development (Raiser's Edge) and financial systems (Great Plains).
 - Implementation of Sharepoint – an intranet to share information and access tools across geographic regions.
 - Personnel manual, financial processes, and human resource processes reviewed and updated. All documents and forms placed on intranet.
 - *Enhance website (Delivery Date: FY09)*
- (4) Raise Growth Funds
- Seed funding secured for: due diligence on five possible expansion cities; first year of Baltimore; first year of Richmond; and expansion in Washington, DC's Ward 8.
 - *Launch campaign to secure funding for rapid expansion (i.e. one city per year) (Delivery Date: TBD)*
- (5) Build Team
- Hired Executive Director for Baltimore and Chief Development Officer (National)
 - *Hire Executive Director for Richmond (Delivery Date: FY10)*
 - *Hire Director of Communications (Delivery Date: FY11)*
 - *Recruit and train a national board (Delivery Date: on-going)*
- (6) Build Communications
- Developed a national communications plan (see section VI)
 - *Develop a national brand (Delivery Date: FY11)*
 - *Establish branding protocols and decision rights (Delivery Date: FY11)*
 - *Develop materials (Delivery Date: FY11)*
- (7) Develop New Sites

- Established expansion city criteria (see section VI)
- Conducted due diligence on five possible sites
- Established site agreements
- Launched Baltimore
- Began launch work in Richmond
- *Begin launch work in Pittsburgh (Delivery Date: FY11)*

Again, the goal of Higher Achievement’s expansion is not simply to serve additional scholars, but to serve them effectively, thus, the organization uses key program indicators and scholar outcomes to measure its performance:

Phase I Expansion Performance Goals

Program Quality Indicators	Target
Staff Retention	85%
Scholar Roster	(see table: numbers of scholars served)
Center Attendance	85%
Mentor Roster	457
Mentor Satisfaction	4
Scholar Outcomes	
	Target
Reading GPA Improvement	50%
Math GPA Improvement	50%
Attendance Rate Improvement	50%
Tardiness Rate Improvement	50%
Reading Test Score Improvement	50%
Math Test Score Improvement	50%
Reading GPA (four year graduates)	TBD
Math GPA (four year graduates)	TBD
Attendance Rate (four year graduates)	TBD
Tardiness Rate (four year graduates)	TBD
Test Score (four year graduate)	TBD
Placement Rate	TBD
Financial Indicators	
	Target
Revenue	\$18.0M
Cost Per Scholar	\$5,500

12 Month Operating Plan

Higher Achievement staff engages in a planning process every year. Key priorities are established by the leadership team and typically span three years. Measurable outcomes are determined by key performance indicators and automatically populate into every staff member’s plan. Staff members then work closely with their teams and Executive Directors to

establish goals and strategies for meeting outcomes. These plans are entered into SuccessFactors, Higher Achievement's performance tracking tool, and are rolled-up into a larger organization-wide plan (see Appendix H for the current fiscal years operating plan).

Marketing Plan

See Appendix I

Vision for Influencing Sector Changes

The Higher Achievement approach to academic attainment is rigorous, intense and individualized. Over thirty years of experience has confirmed that this is what it takes to place at-risk middle school youth on a path to success in both school and life. As a result, the number of students Higher Achievement can reach might fall short of some people's definition of scale. However, only considering Higher Achievement's *direct* impact would be missing the bigger picture. Instilling academic behaviors and attitudes in a critical mass of scholars influences the schools which those scholars attend; recruiting a mentor for every scholar impacts the community; deeply engaging parents in their child's academic success impacts a family; exposing graduate students to work in disadvantaged urban communities through summer teaching internships impacts the education sector -- the list goes on. Indirect impact, while much more difficult to measure, cannot and should not be discounted.

More importantly, as a results-driven organization Higher Achievement informs and transforms the field of education. **Every Higher Achievement scholar is proof that high-quality, extended learning opportunities can make the difference between a child dropping out of high school and a child going to college.** Reaching scale is when Higher Achievement's results promote awareness of extended learning as an education reform option which in turn affects policy changes and encourages investments from the private and public sectors. This type of systemic change paves the way for Higher Achievement, schools, and other OST providers to exponentially impact the lives of thousands of children.

VII. EVALUATION AND KNOWLEDGE MANAGEMENT PLAN

In March of 2006, Higher Achievement contracted with Public/Private Ventures, a nationally-recognized research firm, to measure the impact of its opportunity-based model through a randomized study, the first in the country to examine an academic intervention among middle school students that utilizes a multi-year, out-of-school time (OST) approach. The study, to be published and disseminated by May 2011, examines results from nearly 1000 students from May 1, 2006 through May 1, 2011. Already, it is helping Higher Achievement to assess which parts of its model contribute most to results and to examine cost-benefit issues and challenges. Ultimately, the study will enable Higher Achievement to adjust its model to maximize results during a second phase of rapid expansion beginning in 2012.

Higher Achievement also incorporates evaluation into the organization's daily activities to drive improved results and excellence. Upon entry into the program, students' grades, test scores

and other data are entered into a management information system to create individualized plans and generate periodic analysis. Further, scholars, mentors and parents/guardians participate in bi-annual 360-degree evaluations which enable Higher Achievement to compare scholar behaviors, skills and attitudes from multiple perspectives, year-to-year, and between centers in order to address issues and plan pro-actively. Regular updates to dashboards reviewed monthly by the leadership team enable the organization to identify red flags quickly.

VIII. INFRASTRUCTURE REQUIREMENTS

While the majority of the core infrastructure has been built out during Phase I of expansion, there is still much needed investment in capacity building. More specifically:

Development: Through FY10, the development function was largely decentralized, however, starting in FY11 that will no longer be the case (Appendix B). Experience in Baltimore tells us that it is costly to recreate a development function in each new affiliate, we are not mining and cultivating new regions quickly enough – leaving low-hanging fruit untouched, and the development leadership team is operating in silos as opposed to being leveraged based on contacts and skill.

Communications: Hiring a Director of Marketing was placed on hold until additional funds were secured. The organization, however, does not feel this position can remain vacant for much longer. National branding, media outreach, social media integration, marketing collateral and support of affiliates all have a direct impact on our ability to successfully enter into direct mail fundraising – a priority in FY11.

Alumni: Little effort is currently being made to locate former scholars and engage them in Higher Achievement’s work. Mobilizing this natural constituency would aid the organization in advocacy efforts.

Board Development: Higher Achievement engaged a firm in FY10 to help identify and recruit national board members. While there was some degree of success with the recruitment of two new members and five interested, long-term prospects, there is still much work to be done at the board level.

Curriculum: Higher Achievement believes its curriculum is unique in the out-of-school time field. Tools have been developed to ensure alignment to state and national standards and it is written in a format that is easy to use. That said, it needs to be enhanced so mentors (who are not trained teachers) can more easily tailor and individualize lessons to their scholar’s needs – a consistent source of feedback on internal surveys. As well, the organization believes an opportunity exists to package and disseminate the curriculum to the broader field, reaching thousands more children.

Website: The Higher Achievement website is currently undergoing a new design and launch. However, there are already several projects in the pipeline to continue to enhance it. Interactive “life” games to drive scholars and families to the site, an online library of resources, etc. The website is priority as it is often the first introduction to a donor, scholar, program partner, etc. The current website does not convey a national brand or presence.

IX. FINANCIAL PLAN

Capital Required to Finance Expansion

Revenue Goals Including Operating Expenses (FY 2010 – 2012)

	<u>FY 2010</u>	<u>FY 2011</u>	<u>FY2012</u>	<u>TOTAL</u>
Revenue Goal	\$5.7M	\$6.2M	\$6.2M	<i>\$18.1M</i>

<u>Revenue Stream</u>	<u>FY 2010</u>	<u>FY 2011</u>	<u>FY 2012</u>	<u>TOTAL</u>
Public Funds	12%	32%	34%	26%
Foundation	56%	50%	44%	50%
Corporate	25%	10%	12%	16%
Individuals	6%	7%	9%	7%
Other	1%	1%	1%	1%

Resource Development Strategy

In addition to investing in and building out core infrastructure, a sustainability model has been completed and Higher Achievement will use Phase I to test assumptions with the board, major donors and field experts. The end result should be a refined model of sustainability that will give the organization a strong framework from which to successfully and more rapidly expand (Phase II). While the model contains several assumptions that must be tested, the main assumption, from which others flow, is that a public revenue stream exists (Title I) that can be tapped into on a per scholar basis. (Appendix D)

Current Funders and Commitments

Current commitments for national expansion and the P/PV study (2010 -2012) include:

Altria - \$1,000,000

Wallace Foundation - \$2,250,000
William T. Grant - \$245,000
TOTAL: \$3,495,000

Current commitments for DC Metro expansion include:

Horning Family Foundation - \$25,000
Spring Creek Foundation - \$150,000
MARPAT Foundation - \$30,000
Cafritz Foundation - \$150,000
George Preston Marshall Foundation - \$15,000
LISC - \$50,000
TOTAL: \$420,000

X. RISK ASSESSMENT AND CONTIGENCY PLANNING

Higher Achievement spends approximately 18-months conducting in-depth due diligence on a city prior to expansion. While not every risk can be addressed, as much as possible, the organization tries to identify and mitigate risks or, simply does not expand to that city. Furthermore, the first three years of seed funding is in hand prior to a new city opening. Given the organization only opens two centers in year one, if financial sustainability looks to be a problem, additional centers do not need to open. While this would slow growth, it would not compromise the work with current scholars at the two centers. In an extreme case, incoming scholars would not be recruited into the existing centers and the organization would allow existing scholars to remain in the program until graduation at which time Higher Achievement would exit from the city.

Other risks include engaging in a population that is far more remedial than expected and thus, has trouble with the curriculum. This has been our experience at one of the Baltimore Achievement Centers. As a result, fewer scholars will be recruited for the next academic year, intentionally keeping the staff to scholar and mentor to scholar ratios high to allow for individualized attention. While this slows growth, it does not sacrifice scholar outcomes.

Staff and Board Bios

RICHARD TAGLE is the Chief Executive Officer of Higher Achievement. He has more than 20 years of experience as a program manager, fundraiser, financial manager, and policy analyst that enable him to address the issues that are at the center of his core passion: the social and academic achievement of all children. Prior to joining Higher Achievement, Richard held several senior level positions at the Public Education Network (PEN), most recently Chief of Staff. His responsibilities included management of key activities in the areas of finance, administration, communications, and development. In addition to significant accomplishments in securing financial support for PEN, Richard was instrumental in a number of initiatives aimed at improving the lives of students, from gender and racial equality, to access to adequate healthcare coverage, to academic enrichment programs. Richard was a Founding Board Member and Interim Executive Director of the Asian Partnership for Health, and he served as Senior Program Officer of Health Programs at the U.S. Conference of Mayors. He is an active member of a number of boards, including the Center for Summer Learning at Johns Hopkins University and D.C. VOICE. He has authored a wide range of articles on the quality and future of the nation's public schools and education for under-served populations. Richard graduated Summa Cum Laude with a Bachelor of Arts from American University and went on to receive a Master of Arts from the same institution.

KATHRYN STEPHENS BEISEL is the Chief of Staff, serving as the right hand to the Chief Executive Officer and serves on the senior team engaged in strategic planning for the organization. As Chief of Staff, Ms. Beisel oversees the organizational development, capacity building, human resource development and systems improvement that supports Higher Achievement's expansion. Ms. Stephens has twenty years of management and organizational development experience working with Washington, D.C. non-profits. Her expertise includes organizational development, financial management, executive coaching, and capacity building. Prior to joining Higher Achievement, Ms. Stephens worked as a consultant to executive directors, boards of directors, and as an executive director herself. She has worked with more than 20 non-profits in the D.C. metropolitan region. As an executive director, Ms. Beisel was recognized for her management success when the organization under her leadership received the 1998 Washington Post Excellence in Non-Profit Management Award. She is a graduate of Georgetown University's Organizational Development Program and she has been trained in professional coaching by the Coaching Training Institute. Her undergraduate studies were completed at The George Washington University in Washington, D.C.

NICOLE LEVINE is the Chief Development Officer for Higher Achievement. In her role as CDO, Nicole oversees all aspects of the organization's national development operations and acts as a consultant to regional affiliates. Prior to Higher Achievement, Nicole was Co-Founder and President of Firefly Children's Network, a non-profit that provides best practices and tools to international governments, community leaders and direct care providers working to keep families intact and prevent child abandonment. Nicole served as Firefly's first Executive Director and successfully established the organization's presence in Russia. Nicole also currently serves on the Board of Directors of Miriam's Kitchen.

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RACHEL GWALTNEY is Chief of Programs for Higher Achievement. In this capacity she oversees summer and after-school curricula design, professional development of program staff, data gathering and analysis, and ensures program fidelity across affiliates. Before coming to Higher Achievement, Ms. Gwaltney worked for Success for All Foundation, an organization that has developed a nationally recognized, comprehensive, whole-school reform model targeting schools with students considered “at-risk.” At Success for All, Ms. Gwaltney designed, wrote, and edited reading, language arts, social studies, science, and conflict resolution curriculum for elementary and middle school programs. These programs feature a cooperative learning model to promote teamwork and active learning. She spearheaded the development of a style guide to standardize language in SFAF materials. Ms. Gwaltney was also responsible for attracting, signing on, and coordinating schools using the elementary science and social studies component of the program. Outside of work, Ms. Gwaltney has volunteered her time and skills at various institutions in the Baltimore and Washington area, including the Saturday Environmental Academy, the Capitol Hill Chorale, the Village Learning Place, and the Maryland Historical Society. Ms. Gwaltney has a B.A. in History and a Masters in Liberal Arts from The Johns Hopkins University, and an Executive Certificate in Nonprofit Management from Georgetown University.

LYNSEY WOOD JEFFRIES is the Executive Director of Higher Achievement Dc Metro. After five years as a Higher Achievement volunteer mentor, Ms. Jeffries joined the professional staff of the organization in May 2005 as the Director of Grants and Communications, and was promoted to Executive Director in April 2008. She is responsible for all regional operations for the organization which serves more than 500 motivated middle school students each year. Prior to joining Higher Achievement, Ms. Jeffries was a program officer for the Fannie Mae Foundation, specializing in financial education for lower income families. Previously, Ms. Jeffries spent four years at NeighborWorks, a Congressionally-chartered national affordable housing nonprofit intermediary. Ms. Jeffries holds a BA from Wake Forest University, where she majored in English and Sociology. She earned a Master’s degree in Public Administration from the University of Pittsburgh with a concentration in Nonprofit Management.

ERIN HODGE-WILLIAMS is the Executive Director of Higher Achievement Baltimore. She comes to Higher Achievement after working as Baltimore’s After School Strategy Director for the Safe and Sound Campaign, a non-profit organization dedicated to improving the well-being of children and youth in Baltimore. At Safe and Sound, Ms. Hodge-Williams worked with key public and foundation leaders to develop and implement the BOOST after school initiative, a citywide after school model, which started in 15 Baltimore City Public Schools in 2004 and has expanded to 57 schools in 2007-2008. She forged relationships with organizations in the public and private sector to identify ways to leverage after school opportunities for children and youth, and helped raise over \$14 million dollars over five years through advocacy efforts and accessing a variety of funding streams. Previously, Ms. Hodge-Williams was the Director of the St. Veronica’s After-School Academy for Associated Catholic Charities, and a Manager and

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Resource Center Coordinator for the Millennium Center at the Advanced Resource Management Systems. Ms. Hodge-Williams is a licensed clinical social worker in the State of Maryland. She has a Bachelors Degree in Humanities from Washington College and a Masters of Science degree in Social Administration and Community Organizing from the University of Maryland School of Social Work.

Board Members

SAMEER BHARGAVA Sameer Bhargava is a principal at the Carlyle Group, a large global private equity firm headquartered in Washington DC. He helps lead the effort in the Aerospace & Defense sector of the US Buyout fund, a \$15 billion fund focused on leverage buyouts. He currently is involved at the Board level of four companies, Kinder Morgan, Veyance Technologies, Vought Aerostructures, and Wesco Holdings. Before joining Carlyle in 2003, Sameer worked at two other private equity firms: Bain Capital and Advent International, both headquartered in Boston, MA, where he did deals in the consumer, industrial and IT sectors. Before Advent, Sameer spent 2 years at McKinsey & Company in Chicago consulting with consumer and chemical companies. Sameer graduated from Harvard Business School with distinction and from Harvard College with an honors degree in biology. In the non-profit sector, Sameer has spent time with numerous organizations in a hands on or strategic capacity. Beyond active participation in Citizen Schools, Junior Achievement, City Year, and Big Brother programs, Sameer has also helped start organizations such as Boston Volunteer Bridge and an Indian fund designed to help provide opportunities for students or young professionals to participate in volunteer activities. Sameer lives in McLean, VA with his wife Nimisha and 3 sons who are 5, 3, and 1 years old.

PATRICIA L. COOK leads Green Tree's business development effort, partnering with other Green Tree senior leaders, to develop relationships that generate ongoing, repeat business for Green Tree. In addition, she is Chief Executive Officer for Green Tree Exchange, an online exchange that facilitates swaps of second liens among participating lenders. Prior to joining Green Tree in 2009, Ms. Cook was EVP and Chief Business Officer of Freddie Mac, where she was responsible for the Single Family, Multi-Family and Investment and Capital Markets Divisions as well as the corporate functions of Mission and Business Operations. Prior to joining Freddie Mac in August of 2004, she served as Managing Director and Chief Investment Officer for Fixed Income at JP Morgan Fleming Asset Management. Prior to JP Morgan, she held similar positions at Prudential Investment Management and Fisher Francis Trees & Watts. She began her career at Salomon Brothers in Fixed Income Sales and Trading. She holds a Masters of Business Administration degree from New York University and a bachelor's degree from Saint Mary's College.

ERIC GAIER Dr. Eric M. Gaier is a Partner and Founding Member of Bates White, LLC an economic consulting firm specializing in litigation support and expert testimony. Dr. Gaier has testified and consulted for numerous government, law firm, and corporate clients across a

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variety of industries including pharmaceuticals, health care, medical devices, technology, transportation, commercial aviation, aerospace manufacturing, and defense procurement. Prior to joining Bates White, Dr. Gaier served as an Associate of A.T. Kearney, a management consulting firm. Previously he was a Research Fellow for the Logistics Management Institute, a Federally Funded Research & Development Center. Dr. Gaier has served as a Consultant to the Panel on Statistical Methods for Evaluating Defense Systems of the National Research Council and as an Instructor with the Department of Economics at Duke University. Dr. Gaier holds MA and PhD degrees in Economics from Duke University and a BA degree in Economics from Florida State University. He has lived and worked in the Washington, DC area since 1996. For the past three years, Dr. Gaier has served on the President's Council for the Higher Achievement Program.

COLLEEN GANNON is a teacher at Washington Jesuit Academy, instructing on the subjects of language arts and religion to grades 6-8. In addition to teaching, Gannon has served as a math tutor, 8th grade advisor and Assistant Soccer Coach to the students of Washington Jesuit Academy, and for the past five years, has consistently served young people in the capacity of teaching, mentoring or coaching. Gannon is currently the Service Chair for the Alliance for Catholic Education DC Fellowship Committee, and amidst her dedication to teaching, has done peer advisement and volunteer management. Gannon obtained her high school diploma from Georgetown Visitation Preparatory School, and graduated from the University of Notre Dame with a Masters in Education.

CARLOS GARCIA, is the co-founder and partner at the Eng Garcia Group, an investment-minded, design-conscious real estate boutique serving clients with residential and commercial properties in DC, Maryland, and Virginia. Mr. Garcia is a founder and principal of Keller Williams Capital Properties. Mr. Garcia also owns and manages Mintwood Properties, a high-end residential real estate investment and rental enterprise serving the tri-state area. Prior to entering the real estate arena, Mr. Garcia practiced law for nearly 15 years, including positions at Gibson, Dunn & Crutcher, the Federal Government, and at Group 1 Software (subsidiary of Pitney Bowes). Mr. Garcia has been the board president of the Higher Achievement Program since 1998 and in 2003, Mr. Garcia was nominated and awarded with the Linowes Leadership Award for his exceptional work in fostering its organizational change and sustainability. Mr. Garcia currently serves on the Selection Committee for recipients of the Linowes Award, the Washington Post Excellence in Non-Profit Management Award and the board of directors of the Frederick B. Abramson Foundation, which provides scholarship support to college-bound DC high-school students. In the past, Mr. Garcia served on the advisory board of CharityWorks, served as a commissioner on the DC Commission for Asian & Pacific Islander affairs, served on the Board of Directors of the Conference for Asian Pacific American Leadership, volunteered delivering meals to the homeless with McKenna's Wagon, and worked for Hands On DC to revitalize area public school facilities. Carlos is a graduate of Boston College Law School, Connecticut College, the Fieldston School (NYC) and Manhattan Country School (NYC). He is a member of the DC Bar Association, Hispanic Bar Association, and National Asian Pacific American Bar Association.

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ALEX HARRIS serves as the Assistant Superintendent for Assessment & Accountability in the DC Office of the State Superintendent of Education where he is responsible for the statewide system of academic content standards, student assessments, school accountability and the longitudinal education database. Previously, he was a program director with the National Governors Association Center for Best Practices where he oversaw the High School Honor States Initiative, a \$23 million, governor-led effort to improve college and work ready graduation rates in 10 states. Prior to NGA, Alex served as Policy Director for Hawaii's early childhood intermediary organization, where he advanced an advocacy agenda for high quality pre-kindergarten programs. During his tenure, state investments in young children increased by over \$25 million. He was also appointed to the state committee charged with transforming the state's K-12 education budget into a weighted student formula. His professional background is in education reform, both at the federal level where he worked on the No Child Left Behind legislation with the Education Trust, and at the local level, where he directed a school improvement project in a New York City high school. Alex received his Master's in Public Policy from Harvard University's John F. Kennedy School of Government and his Bachelor's with Honors from Brown University. He was named a New York City Urban Fellow by then-Mayor Rudy Giuliani in 1998 and an Emerging Leader in 2003 by Marion Wright Edelman at the Children's Defense Fund.

AUDREY HIPKINS is the Executive Editor and Group Publisher of BNA's Environment, Health & Safety Division. In addition to overseeing editorial policy and content of the division's twenty-five publications, Ms. Hipkins directs EH&S marketing activities; guides all phases of new product development, including conception, market testing, technical development, creation of publishing workflows, and marketing and promotion; and identifies and develops business-to-business strategic alliances for the division. Ms. Hipkins joined BNA in 1993 as a Senior Systems Analyst in the Information Technology Division. She was appointed Manager of CD-ROM Development in 1996 and was promoted to Technical Director for Environment, Health & Safety services in 1997. She assumed her current position in 2000. Prior to joining BNA, Ms. Hipkins was President of Quick Source, Inc., where she created CD-ROM products for various government agencies and commercial publishers. She also worked as a programmer for Automated Sciences Group, IBM and Draper Laboratories. Ms. Hipkins graduated from the Massachusetts Institute of Technology with a B.S. in computer science and engineering. She was awarded an M.B.A. by the Fuqua School of Business, Duke University.

KIL HUH, Kil Huh manages the Pew Center on the States Research and Development staff and agenda at the Pew Charitable Trust. He oversees project teams of researchers, policy analysts and consultants to conceptualize, design, and implement research and analysis across 50 states that inform state policy-focused efforts on a wide range of issues including: state tax systems; retirement benefits; mortgage lending and state elections administration. Prior to Pew, he was most recently the director of policy and consulting at the Fannie Mae Foundation and previously manager of the foundation's state and local initiatives. He holds a bachelor of science in urban regional studies from Cornell University, a master's degree in urban planning from New York University and both a master's degree in philosophy and a doctorate of philosophy in urban planning from Columbia University.

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M. SUZANNE KEECH, is a Corporate Managing Director at Studley, a commercial real estate firm with offices nation-wide. Ms. Keech is a transaction manager who provides advisory services in a variety of disciplines including leases vs. own analyses, finance, valuation and portfolio evaluation. She has over 16 years experience in the real estate business and has a proven track-record as a talented asset manager, investment sales, finance and leasing professional. Suzanne's most notable accomplishment is the 2.2 million square foot redevelopment of Eleven Madison on behalf of MetLife. As MetLife's project and leasing director, Suzanne was responsible for the entire redevelopment process, from devising the strategic plan to negotiating leases and providing the return guaranteed to MetLife on this \$430 million project. Ms. Keech, a native of Baltimore, MD, completed her Bachelors of Arts degree and graduated Phi Beta Kappa from Barnard College of Columbia University and finished a Masters of Business Administration, Beta Gamma Sigma, from Columbia University Business School.

ALBERT L. KNOTTS has over 25 years of banking, lending, credit workout, and regulatory experience. He is a founding partner of Strategic Risk Associates, a bank consulting and advisory firm. Over the last two years, through Strategic Risk Associates, Mr. Knotts has worked with community banks, regional banks, and finance companies providing strategic advice including the sourcing of fresh capital, risk management, and credit risk management expertise. Previously, Mr. Knotts held executive level credit positions with Capital One Financial Corporation, PNC Financial Corporation, Dime Bancorp and Wachovia/First Union/First Fidelity Bancorporation. Mr. Knotts started his career in banking with the US Treasury as a bank examiner with the Office of the Comptroller of the Currency in 1982. In addition, to his extensive banking and credit risk management experience, Mr. Knotts is an active member of the financial industries Risk Management Association. Mr. Knotts holds a B.A. in Economics from the University of Washington in Seattle WA, 1982. He resides in Alexandria, Virginia with his wife, Cindy, and their three children.

NIGEL KNOWLES is President of LCG Technologies Corporation, with over eighteen (18) years of IT systems experience. Nigel brings a unique mix of knowledge in multiple IT fields ranging from Controls & Information Systems to Application Development and Network Infrastructure delivery. His vast technology knowledge coupled with his experience across a wide variety of industries (manufacturing to insurance) has allowed him to take his current company, LCG Technologies, Corp (LCG), to the next level. With a Bachelor of Science in Electrical Engineering from Cornell University, Nigel began his career with Procter & Gamble (P&G) in 1991 as a Controls Engineer. By 1995, he was named Technology Lead of a 40 person staff, providing ongoing engineering, maintenance and technical support to the largest P&G facility in United States. After a near decade tenure with P&G, Nigel joined LCG, a Baltimore based IT consulting firm, as an IT consultant. By 2006, he was serving as the company's Vice President and Chief Operating Officer – paving the way to his current role as President. LCG is currently a 50+ person consulting firm focused on delivering mission-critical custom Application Development projects to mid-sized companies in the Baltimore region.

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SARAH LATTERNER is a native Washingtonian and graduate of the DC Public Schools System. Sarah has returned to the city that raised her to serve the community as a public servant through her public policy expertise and community outreach and services skills. Since graduating from Vanderbilt University with an undergraduate degree in Organizational Management and Leadership Studies, Sarah served the District through her work with grant writing and running after school programs for youth at-risk of hunger at the Capital Area Food Bank. After gaining grassroots experience in the field and seeing firsthand the results of inadequate health, education and housing policy, Sarah decided to pursue her Master's in Public Management/Social Policy to eventually affect change at a higher level. After graduation from the University of Maryland's School of Public Policy in 2003, Sarah was accepted in the DC Government Capital City Fellowship Program where she spent a year and a half on 6-month rotations in DC Agencies-making invaluable contacts, gaining management skills, and learning the fine points of the local government policy making process. In 2005 Sarah secured a position with the DC Office of the State Superintendent of Education to continue her work on behalf of underserved populations as the Special Assistant to the Director of Nutrition Services and Child and Adult Care Food Program Manager. There Sarah worked closely on matters related to the budget, policy, program improvement and streamlining efforts, performance management, and the Mayor's Commission on Food and Nutrition. In October 2007 Mayor Adrian M. Fenty asked Sarah to join his team as the Director of the Mayor's Office of Community Relations and Services where she supervises 16 Specialists in all 8 Wards of the city to provide comprehensive outreach and neighborhood services to DC constituents. In this capacity Sarah serves as a liaison between the Mayor, DC residents and DC Government Agencies to enhance the quality of life at the neighborhood level. When Sarah is not busy with formally serving the city through her job, she volunteers her time with the homeless and youth. Sarah resides in Northeast DC with her sister, Margaret and dog, Pebbles.

ANNIE LINEHAN CZERWINSKI, Program Director for ServiceCorps, oversees the ServiceCorps program, directing operations and strategy for ServiceCorps' civic engagement program for local corporate partners. Her previous experience includes two years of corporate marketing with The Advisory Board Company and the Corporate Executive Board. Prior to that, Annie worked at UNICEF in Buenos Aires, helping direct strategy for Public Private Partnerships in Argentina. She also served with AmeriCorps in Washington, D.C., where she taught nutrition through a program developed by the Capital Area Community Food Bank. Annie holds a Bachelor of Arts in Political Science and Spanish from the University of Notre Dame and a Master of Arts from the Georgetown University Public Policy Institute. She is a mentor with the Higher Achievement and was named to the Board of Directors in 2008. Annie formerly served as the Secretary/Treasurer of the Georgetown Public Policy Alumni Board.

BO MENKITI, Founder and Principal of the Menkiti Group, a team of real estate professionals dedicated to community revitalization while achieving excellent results for their clients. Prior to founding the Menkiti Group, he served as the Chief Operating Officer of College Summit, a national non-profit organization dedicated to increasing the college enrollment rates of low-income students, where he led the growth of the organization from a local non-profit to a national multi-site organization serving over 4,000 students across the country. Previously, Mr.

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Menkiti worked on the development of The Atlantic Media Company and served as a strategy analyst to the chairman of the Advisory Board Company where he worked on the company's IPO. He started his career at Prism Consulting International, a management consulting firm providing advice to Fortune 500 executives in the areas of strategy, operations, and supply chain management. Mr. Menkiti earned a cum laude graduate of Harvard University with a degree in sociology. As a student, Mr. Menkiti was involved in the local community and was awarded the Neil J. Houston and Donald Morland Awards for Public Service and Social Action as well as the city of Cambridge's Mack Davis Award for the highest service to the Cambridge community. Mr. Menkiti has a long-standing interest in education and ways in which private sector and public sector concepts and practices can be harnessed for social change. He remains active in the DC Community working on college access issues with College Summit and serving on the Board of Directors of The Higher Achievement Program.

SANJAY JOSE MULLICK is an attorney member of Pillsbury Winthrop Shaw Pittman's international trade group. Mr. Mullick concentrates his practice in international dispute resolution, export controls and international trade regulation. Mr. Mullick has extensive experience advising governments and companies in international arbitration and litigation, including dispute resolution proceedings under the investment provisions of the North American Free Trade Agreement (NAFTA), the International Center for Settlement of Investment Disputes (ICSID) and bilateral investment treaties. Prior to joining the firm, Mr. Mullick spent three years at the Department of Commerce serving in both the Office of the Chief Counsel for Import Administration and the Import Administration. Mr. Mullick graduated from Georgetown University with a B.S.F.S.; and earned his J.D. from the Georgetown University Law Center where he served as the editor of Foreign Publications for the Georgetown International Environmental Law Review. Mr. Mullick is a member of the American Bar Association; District of Columbia Bar International Trade Planning Committee; and the Washington International Trade Association.

JACQUE PATTERSON graduated from public schools and served on active duty in the U.S. Air Force for nearly 14 years. During that time, he deployed to Saudi Arabia for Operation Desert Shield, France for Operation Joint Guard and spent a year in South Korea. His distinguished military career includes a promotion through the Stripes for Exceptional Performers (STEP) program, Military Outstanding Volunteer Service Medal, distinguished graduate from non-commissioned officer academy, the Meritorious Service Medal and numerous other medals and commendations. He joined the Air Force Reserves in 2001 and currently holds the rank of Senior Master Sergeant attached to HQ Air Combat Command, Langley AFB, VA. As a project director with the Federal City Council, Mr. Patterson focuses on affordable housing, libraries, government operations, education and public safety issues confronting the District of Columbia government. Before joining the Federal City Council in this capacity, he served the District of Columbia as Community Affairs Coordinator, Office of Community Affairs, Executive Office of the Mayor. Mr. Patterson's career in public service began when he was selected for the Capital City Fellow's program. His assignments during the fellowship were with the Deputy Chief Finance Officer, Office of Tax & Revenue and job training coordinator for the DC Brownfields Program. He also served as a policy analyst, Office of Policy, Planning, and Program Evaluation,

Appendix A

DC Department of Health. He serves on numerous boards and commissions throughout the city, to include the Levine School of Music, Advisory Neighborhood Commission 8B, Septima Clark Public Charter School for Boys, and the Far Southeast Family Strengthening Collaborative. Mr. Patterson received his Masters of Public Administration from Central Michigan University and a graduate certification as a Certified Public Manager from the George Washington University. He holds an undergraduate degree in Education from Southern Illinois University and is currently pursuing a doctorate at Northeastern University in Law & Policy.

MARY BETH PELOSKY is the assistant principal at Nottingham Elementary School, part of the Arlington School System (APS has had at least three of its 5 high-school listed in the top tier of the top 100 public high schools by Newsweek magazine for the last 4 years). She began her career as a first grade teacher in Worcester, Mass. in 1992 before taking a position as a fifth grade teacher at Barrett Elementary School in Arlington in 1993. Pelosky taught at Barrett until 2002. Prior to becoming the principal of Nottingham Elementary, she was the assistant principal at Swanson Middle School from 2002 until 2006. She has also held positions teaching ESOL/HILT (high intensity language training/English as a second language) and as a summer school principal.

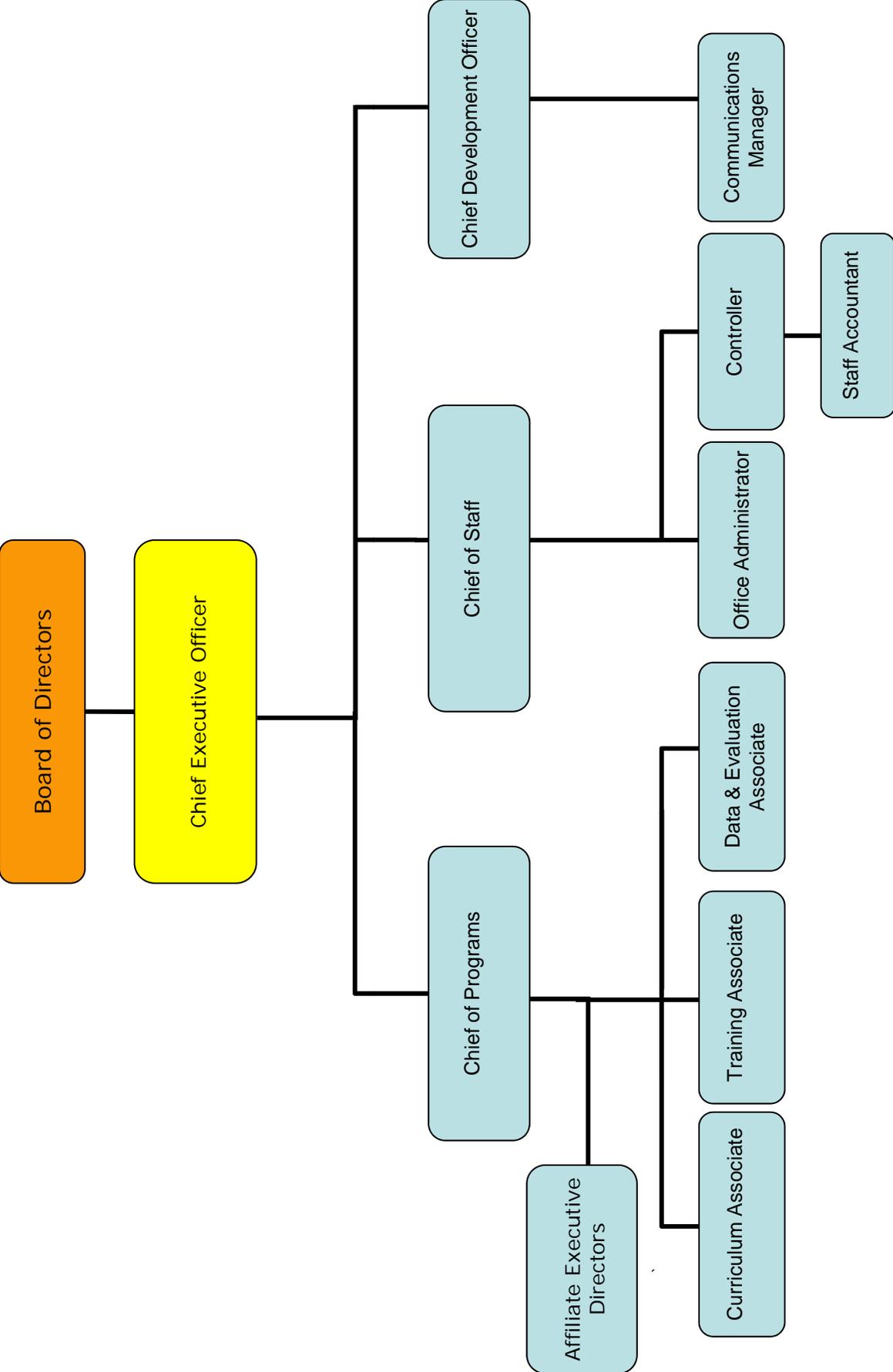
She earned a bachelor's degree in English and sociology and a master's degree in education from the University of Massachusetts. She also earned a master's of education in educational leadership and a principal certification from George Mason University. Pelosky is a member of the American Association of University Women's Arlington Branch, the Superintendents Advisory Committee or the Elimination of the Achievement Gap and the National Middle School Association.

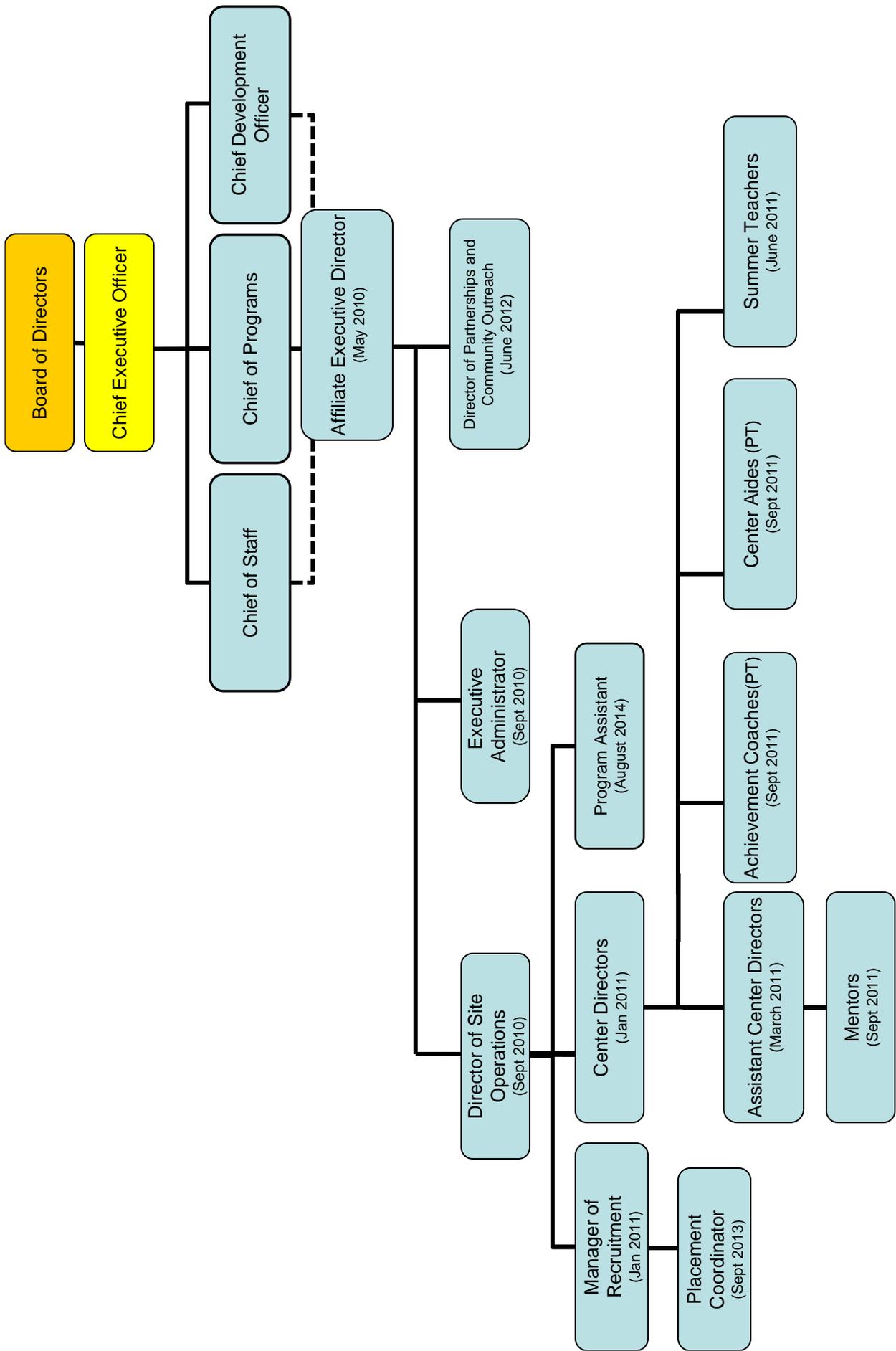
KIMBERLY D. ROBERTSON is a partner with Raffa & Associates, P. C. Ms. Robertson has served the not-for-profit industry exclusively for more than fifteen years. Prior to joining Raffa & Associates, Ms. Robertson was a senior manager at a Washington, DC CPA firm that served primarily not-for-profit organizations where she was responsible for the planning, performance and review of more than 40% of the firm's not-for-profit audit, tax and consulting engagements. Ms. Robertson has also been speaker at the American Society of Association Executives (ASAE) Financial Management Symposium and at the not-for-profit symposium sponsored by the Virginia Society of Certified Public Accountants. Ms. Robertson has authored many articles pertaining to the not-for-profit industry which have been published in monthly newsletters and ASAE's *Association Law and Policy* and *Dollars and Cents*. Ms. Robertson is a graduate of the University of Maryland and is currently the Treasurer and Finance Committee Chair of The Higher Achievement Program and a board member and Assistant Chair of the Finance Committee of Nexus Health, the parent company of the Fort Washington Medical Center and the Carolyn Boone Lewis Health Care Center. She is also a member of the American Institute of Certified Public Accountants, ASAE, the National Association of Black Accountants and the Greater Washington Society of Certified Public Accountants (GWSCPA).

General Counsel

Appendix A

GARY THOMPSON is a Partner at Reed Smith. Mr. Thompson represents and advises policyholders with regard to insurance matters in a broad range of contexts, from claim preparation and negotiation, to litigation in state and federal court, as well as in alternative dispute resolution proceedings. Gary is one of the top, most experienced policyholder-side lawyers in the country. Prior to Reed Smith, Gary was a founding partner at Gilbert Heintz & Randolph LLP, a partner/associate at Howrey Simon Arnold & White, LLP, and an associate at Kaye Scholer LLP. Mr. Thompson has a steadfast commitment to pro bono and community service, and has won several awards for his achievements. He has undertaken dozens of significant pro bono projects. Gary is currently working pro bono on issues relating to Hurricane Katrina, insurance discrimination, education, and other matters. Other matters include obtaining health coverage for a life-saving cancer stem cell transplant treatment needed by two pro bono clients, assisting 9/11 victims at the Pentagon, litigating a workers' compensation case for a mother who lost a son in the World Trade Center, and advising the largest group of pro bono attorneys presenting claims to the 9/11 Victims' Compensation Fund. Gary serves on the D.C. Bar Pro Bono Committee and on several non-profit Boards including Higher Achievement. Mr. Thompson graduated from Georgetown University with a cum laude BA in Philosophy. He received a J.D. from Rutgers-Newark Law School where he was the Senior Articles Editor of the Rutgers Law Review and the Winner of the Mock Trial.





Development Leadership Team

Description: cultivation and stewardship of donors, corporations and partners of significant net worth or name recognition at the national and regional levels.

Board of Directors

- Individual donors \$50,000+
- High profile partnerships
- Event support

CEO

- Individual donors \$50,000+
- National Foundations \$500K+
- High profile partnerships
- Federal government

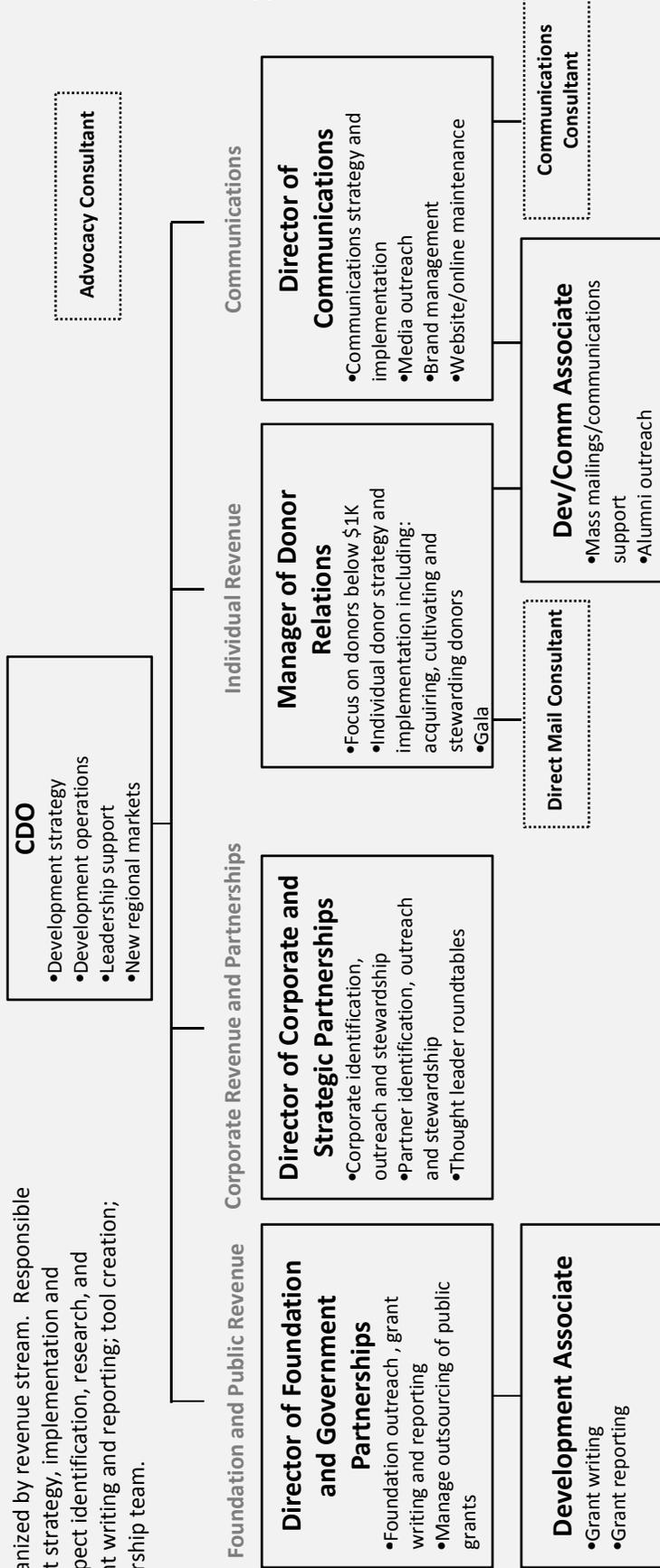
Regional EDs

- Local individual donors \$1K - \$50K
- Local President's Council
- Local businesses
- Local government

Regional PCs

Development Staff

Description: Organized by revenue stream. Responsible for: development strategy, implementation and operations; prospect identification, research, and assignment; grant writing and reporting; tool creation; support of leadership team.



Appendix B

Support Staff

Description: Responsible for data entry, reports, dashboards and staff database training.

Data Associate(s)

Notes:

- Local events would be handled by the Manager of Scholar Development
- Vistas will be responsible for local PR/Marketing and will meet weekly with the Director of Communications
- ED development efforts will be supported in house by the Executive Administrator

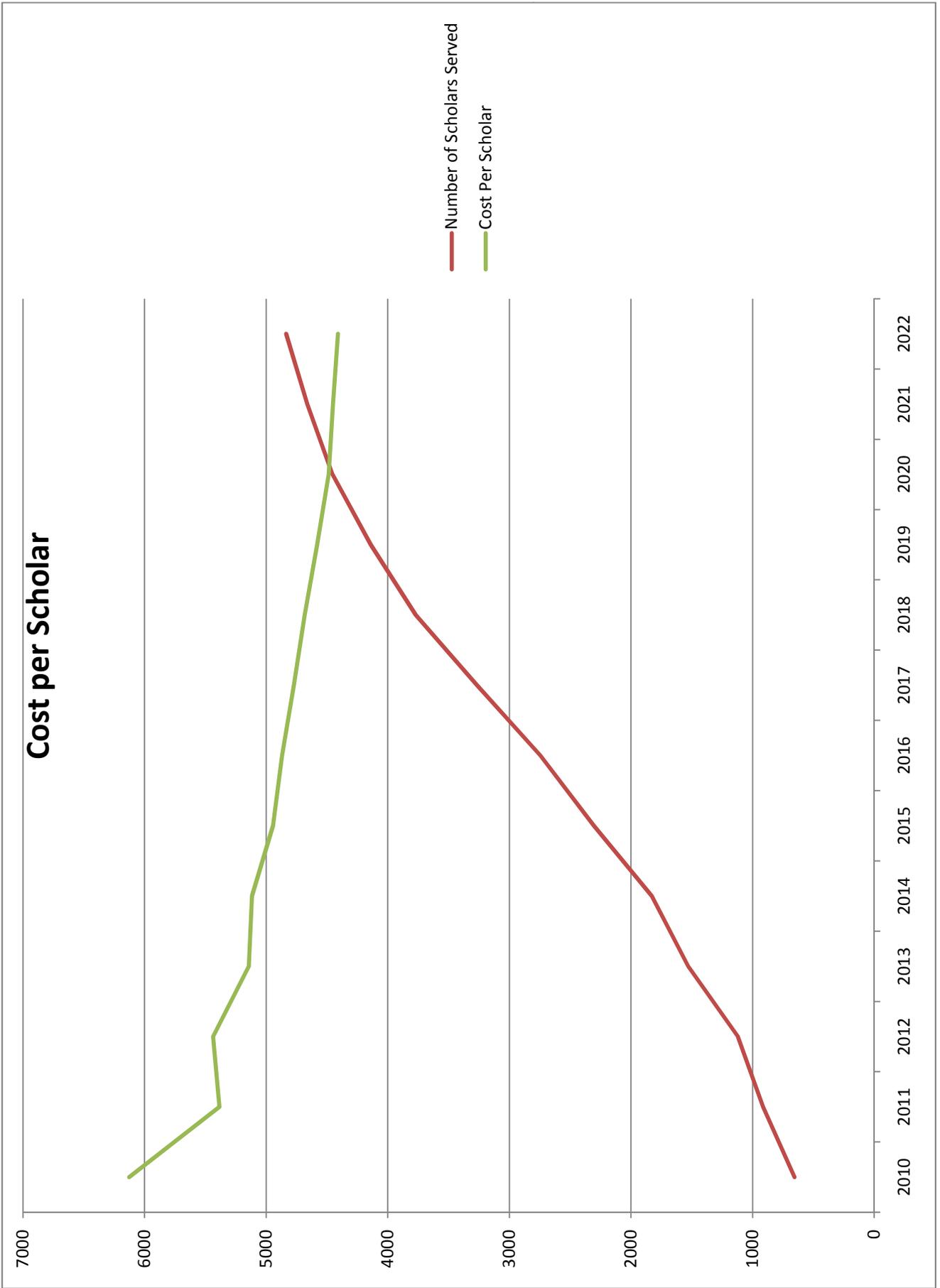


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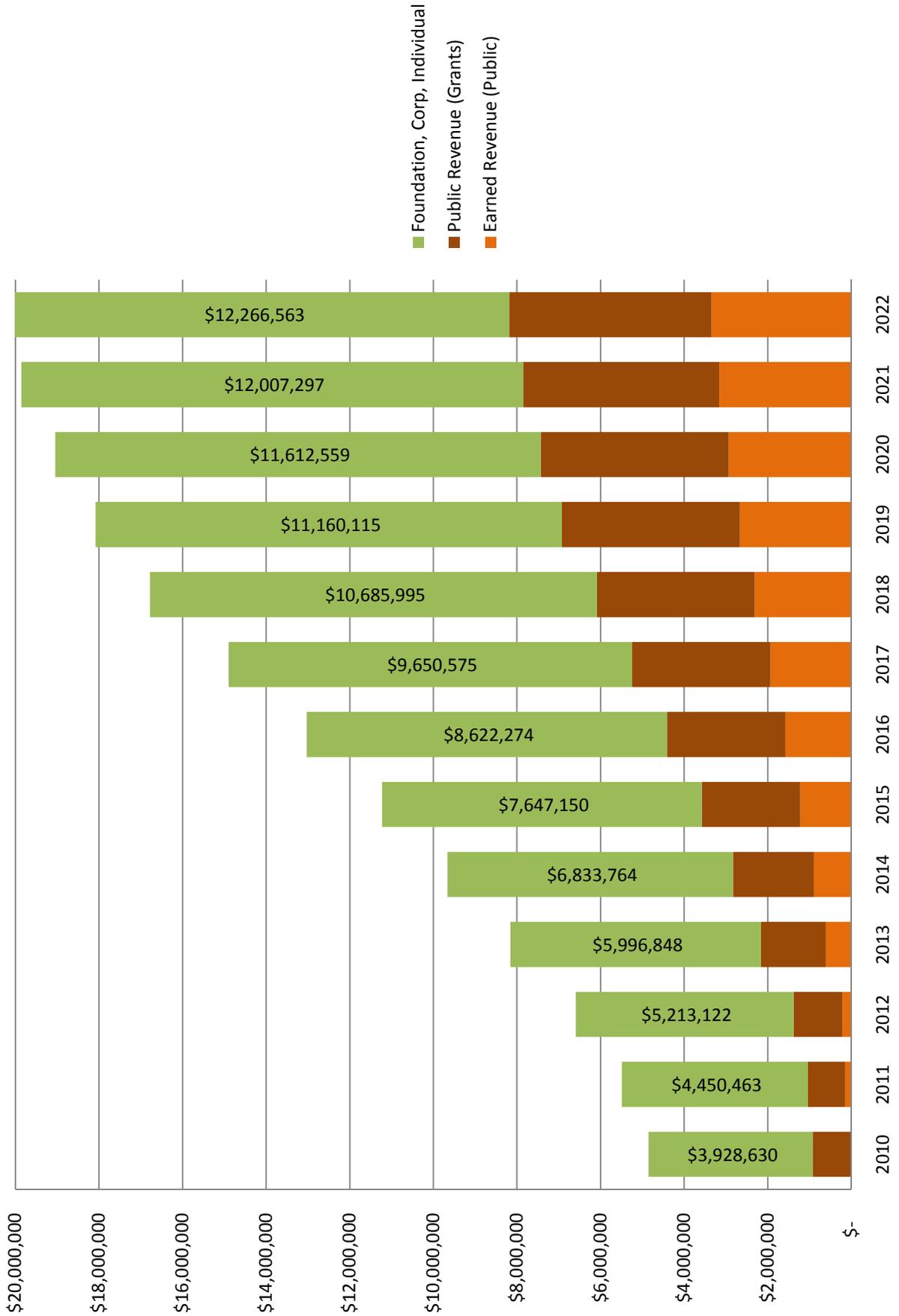
	FY10	FY11	FY12	FY13	FY14	FY15	FY16	
	launch	opening	Year 1	Year 2	Year 3	Year 4	Year 5	Grand Total
# of Centers (AS)		0	2	2	3	4	5	
# of centers (summer)		2	2	3	4	5	5	
# of AS Scholars	\$ -	0	100	150	210	325	400	
# of Summer Scholars	\$ -	120	160	270	300	440	475	1,765
Total Expense	\$ 37,583	\$ 493,850	\$ 861,800	\$ 1,031,100	\$ 1,267,325	\$ 1,703,675	\$ 1,898,125	\$ 7,293,458
Price Per Scholar			\$ 6,629	\$ 4,910	\$ 4,970	\$ 4,454	\$ 4,339	
Foundations								
Anchor	\$ 40,000	\$ 375,000	\$ 300,000	\$ 200,000	\$ 150,000			\$ 1,065,000
Base			\$ 100,000	\$ 200,000	\$ 385,000	\$ 650,000	\$ 675,000	\$ 2,010,000
Sub-total Foundations	\$ 40,000	\$ 375,000	\$ 400,000	\$ 400,000	\$ 535,000	\$ 650,000	\$ 675,000	\$ 3,075,000
		75%	46%	39%	42%	38%	35%	42%
Corporations								
Anchor		\$ 125,000	\$ 125,000	\$ 125,000				\$ 375,000
Base					\$ 100,000	\$ 150,000	\$ 200,000	\$ 450,000
Sub-total Corporations	\$ -	\$ 125,000	\$ 125,000	\$ 125,000	\$ 100,000	\$ 150,000	\$ 200,000	\$ 825,000
		25%	14%	12%	8%	9%	11%	11%
Individual								
			\$ 25,000	\$ 100,000	\$ 150,000	\$ 175,000	\$ 200,000	\$ 650,000
		0%	3%	10%	12%	10%	11%	9%
Sub-Total Private	\$ 40,000	\$ 500,000	\$ 550,000	\$ 625,000	\$ 785,000	\$ 975,000	\$ 1,075,000	\$ 4,550,000
Public								
Grants			\$ 235,000	\$ 280,000	\$ 330,000	\$ 425,000	\$ 475,000	\$ 1,745,000
Fee for Service	\$ -	\$ -	\$ 81,900	\$ 132,300	\$ 160,650	\$ 307,913	\$ 352,188	\$ 1,034,950
Sub-total Public	\$ -	\$ -	\$ 316,900	\$ 412,300	\$ 490,650	\$ 732,913	\$ 827,188	\$ 2,779,950
		0%	37%	40%	38%	43%	43%	38%
Total	\$ 40,000	\$ 500,000	\$ 866,900	\$ 1,037,300	\$ 1,275,650	\$ 1,707,913	\$ 1,902,188	\$ 7,329,950
(Gap)	\$ 2,417	\$ 6,150	\$ 5,100	\$ 6,200	\$ 8,325	\$ 4,238	\$ 4,063	\$ 36,492
Total Funding								
Private	100%	100%	63%	60%	62%	57%	57%	62%
Public	0%	0%	37%	40%	38%	43%	43%	38%
Public Sector Revenue Calculations								
Formula Funding								
Assumptions								
% of scholars			70%	70%	70%	70%	70%	
Fee for Scholar			900	900	900	1150	1150	
Total Fee for Service			\$ 81,900	\$ 132,300	\$ 160,650	\$ 307,913	\$ 352,188	\$ 1,034,950



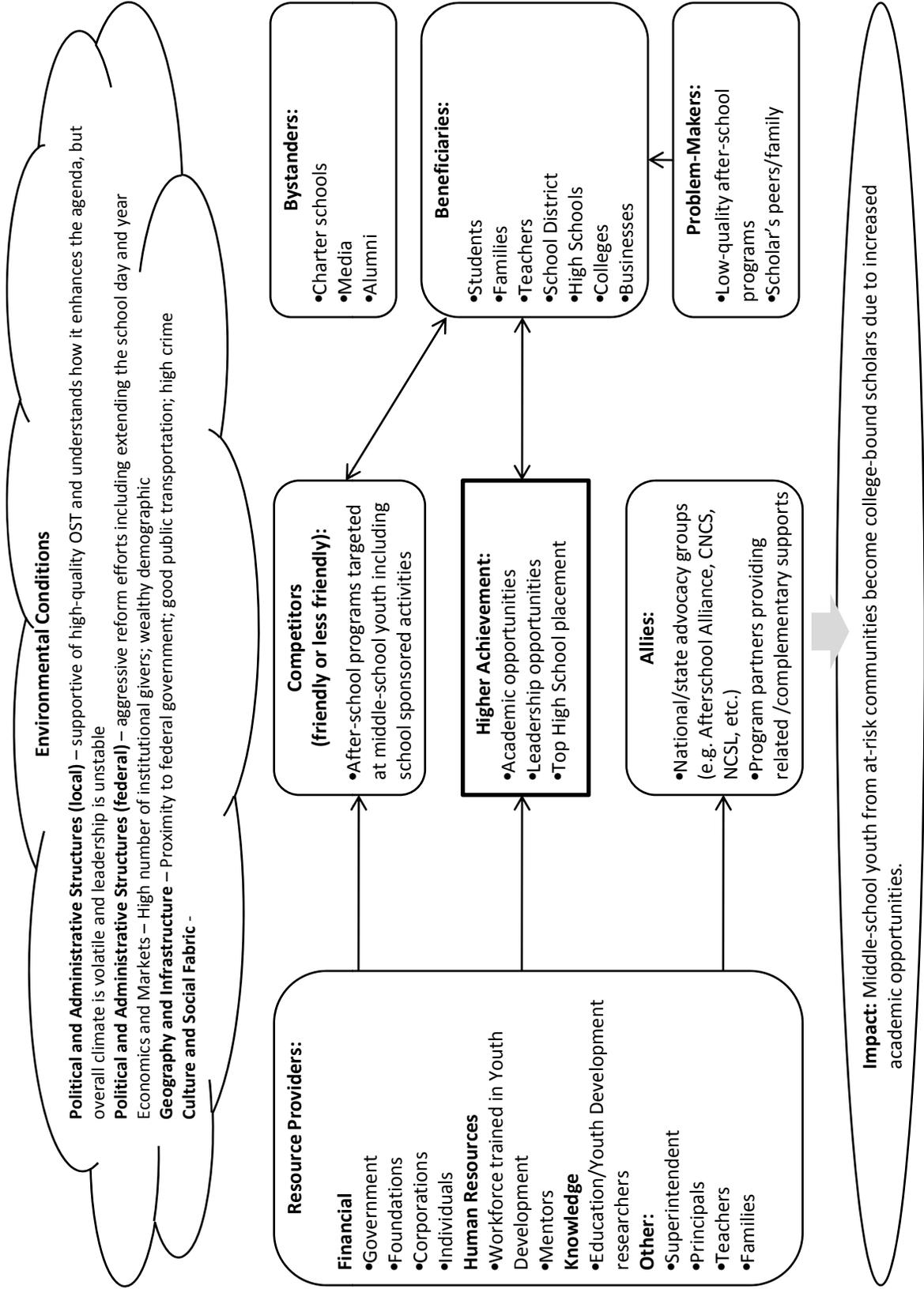
FISCAL YEAR	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
# Localities	2	3	4	5	6	7	8	9	10	10	10	10	10
# Centers	8	11	14	18	22	27	32	38	43	46	49	51	52
# of Summer Scholars	655	915	1120	1530	1830	2305	2745	3265	3770	4140	4455	4660	4835
# of AS scholars	500	595	785	1055	1340	1665	2065	2465	2945	3340	3645	3895	4085
Staffing													
Affiliate Staff	33	42	55	70	83	100	117	134	150	159	168	174	178
National Staff	12	14	15	18	20	20	21	22	22	22	22	22	22
Total Staff	45	56	70	88	102	113	125	135	143	146	149	151	152
Expense													
National Expenses	\$ 1,637,905	\$ 1,798,360	\$ 1,886,034	\$ 2,116,483	\$ 2,292,313	\$ 2,308,941	\$ 2,385,684	\$ 2,467,133	\$ 2,486,001	\$ 2,505,684	\$ 2,526,217	\$ 2,547,638	\$ 2,569,987
Affiliate Training and Support Fee (10% of Aff Exp)	\$ (318,036)	\$ (369,541)	\$ (470,766)	\$ (604,273)	\$ (737,161)	\$ (892,041)	\$ (1,064,598)	\$ (1,242,845)	\$ (1,429,282)	\$ (1,557,632)	\$ (1,651,945)	\$ (1,730,766)	\$ (1,788,111)
National Expenses (excl Affiliate Trng Support)	\$ 1,319,869	\$ 1,428,819	\$ 1,415,269	\$ 1,512,211	\$ 1,555,151	\$ 1,416,900	\$ 1,321,086	\$ 1,224,287	\$ 1,056,720	\$ 948,052	\$ 874,271	\$ 816,872	\$ 781,876
Affiliate Expenses	\$ 3,498,398	\$ 4,064,950	\$ 5,178,425	\$ 6,647,000	\$ 8,108,775	\$ 9,812,450	\$ 11,710,575	\$ 13,671,300	\$ 15,722,100	\$ 17,133,950	\$ 18,171,400	\$ 19,038,425	\$ 19,669,225
Total Organizational Expense	\$ 4,818,267	\$ 5,493,769	\$ 6,593,694	\$ 8,159,211	\$ 9,663,926	\$ 11,229,350	\$ 13,031,661	\$ 14,895,587	\$ 16,778,820	\$ 18,082,002	\$ 19,045,671	\$ 19,855,297	\$ 20,451,101
Revenue													
Affiliate Revenue	\$ 3,498,000	\$ 3,942,306	\$ 5,119,672	\$ 6,647,708	\$ 8,232,944	\$ 10,012,771	\$ 11,970,267	\$ 13,935,861	\$ 15,853,625	\$ 17,300,012	\$ 18,386,172	\$ 19,308,849	\$ 20,001,286
Fundraising Requirement	\$ 1,320,267	\$ 1,551,463	\$ 1,474,022	\$ 1,511,503	\$ 1,430,982	\$ 1,216,580	\$ 1,061,395	\$ 959,726	\$ 925,195	\$ 781,990	\$ 659,500	\$ 546,448	\$ 449,815
Total Org Revenue (Nat & Affiliates)	\$ 4,818,267	\$ 5,493,769	\$ 6,593,694	\$ 8,159,211	\$ 9,663,926	\$ 11,229,350	\$ 13,031,661	\$ 14,895,587	\$ 16,778,820	\$ 18,082,002	\$ 19,045,671	\$ 19,855,297	\$ 20,451,101
Total Org. Earned Revenue (Public)	\$ -	\$ 152,306	\$ 214,572	\$ 611,363	\$ 899,163	\$ 1,226,200	\$ 1,578,388	\$ 1,939,013	\$ 2,311,825	\$ 2,665,888	\$ 2,937,113	\$ 3,157,000	\$ 3,348,538
Total Org. \$ Other Public	\$ 926,000	\$ 891,000	\$ 1,166,000	\$ 1,551,000	\$ 1,931,000	\$ 2,356,000	\$ 2,831,000	\$ 3,306,000	\$ 3,781,000	\$ 4,256,000	\$ 4,496,000	\$ 4,691,000	\$ 4,834,000
Total Org. \$ Private Revenue	\$ 3,892,267	\$ 4,450,463	\$ 5,213,122	\$ 5,996,848	\$ 6,833,764	\$ 7,647,150	\$ 8,622,274	\$ 9,650,575	\$ 10,685,995	\$ 11,160,115	\$ 11,612,559	\$ 12,007,297	\$ 12,245,563
	\$ 4,818,267	\$ 5,493,769	\$ 6,593,694	\$ 8,159,211	\$ 9,663,926	\$ 11,229,350	\$ 13,031,661	\$ 14,895,587	\$ 16,778,820	\$ 18,082,002	\$ 19,045,671	\$ 19,855,297	\$ 20,451,101
Total Org. Earned Revenue (Public)	0%	3%	3%	7%	9%	11%	12%	13%	14%	15%	15%	16%	16%
Total Org % Other Public	19%	16%	18%	19%	20%	21%	22%	22%	23%	24%	24%	24%	24%
Total Org % Private Revenue	81%	81%	79%	73%	71%	68%	66%	65%	64%	62%	61%	60%	60%
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Price Per Scholar Per Hour - Internal control	\$ 10.15	\$ 9.18	\$ 9.20	\$ 8.71	\$ 8.61	\$ 8.33	\$ 8.17	\$ 8.00	\$ 7.83	\$ 7.63	\$ 7.46	\$ 7.38	\$ 7.31
Price Per Scholar - Internal Control	\$ 6,057.83	\$ 5,384.04	\$ 5,436.67	\$ 5,142.75	\$ 5,115.95	\$ 4,943.30	\$ 4,869.26	\$ 4,771.83	\$ 4,682.68	\$ 4,581.27	\$ 4,486.77	\$ 4,450.83	\$ 4,410.14



Organizational Revenue by Source



Higher Achievement's Ecosystem (DC Metro Region)



HIGHER ACHIEVEMENT LOGIC MODEL: ACTIVITIES, OUTPUTS, OUTCOMES AND MEASURES
GOAL: IMPROVED ACADEMIC BEHAVIORS, SKILLS & ATTITUDES THAT RESULT IN INCREASED ACHIEVEMENT & OPPORTUNITIES

ACTIVITIES	OUTPUTS	OUTCOMES (BENEFITS & CHANGES THAT OCCUR)		MEASURES
WHAT HIGHER ACHIEVEMENT DOES	WHAT STAKEHOLDERS DO	Initial Benefits	Intermediate Outcomes	Long-term Outcomes
<p>ENGAGE STAKEHOLDERS</p> <ul style="list-style-type: none"> Recruit, interview, and enroll scholars from underserved communities (communities with a lack of academic opportunities for minority middle school youth). Recruit, interview, and train volunteer mentors. <p>COMBINE CULTURE AND CONTENT MODEL</p> <ul style="list-style-type: none"> Establish, communicate and reinforce a community culture of high expectations among staff, scholars, volunteers, and families. Deliver academically rigorous, grade appropriate, culturally significant curricula correlated to grade-level learning standards. <p>CULTURE (YEAR-ROUND)</p> <p>Culture rituals include: opening and closing meetings; incentive programs to reinforce positive behavior; leadership opportunities for scholars; caring relationships between youth and adults.</p> <p>AFTER-SCHOOL ACADEMY CONTENT</p> <p>Three times a week. 5.5 hours a day, for 25 weeks: Study hall that includes supervised homework help and academic-themed free time. 75-minute academic sessions in small groups (3:1 ratio) led by trained mentors, 60-minute elective sessions led by paid staff, occasional special events and activities.</p> <p>SUMMER ACADEMY CONTENT</p> <p>Five days a week, eight hours per day, for six weeks: 55-minute academic classes led by trained, paid teachers (literature, math, social studies, science; 15:1 ratio); quiet reading time; elective class; weekly academically relevant field trips; three day overnight university trip; occasional special events and activities.</p> <p>HIGH SCHOOL PLACEMENT</p> <ul style="list-style-type: none"> Link scholars and their families with college preparatory secondary school opportunities (public, charter, parochial, and private) and tuition scholarships Provide individualized assessment and training to scholars in preparation for high school application and transition Educate scholars and families on high school application and financial aid processes <p>ASSESSMENT/EVALUATION</p> <ul style="list-style-type: none"> Track five scholar outcomes (annually) Conduct 360 evaluation of individual scholar skills, behaviors, and attitudes (twice a year) Collect mentor session feedback (weekly) Monitor program fidelity (ongoing) 	<p>ENGAGE</p> <ul style="list-style-type: none"> Scholars apply and commit to attend the program year round for up to four years (through their 8th grade year). Volunteer mentors apply and commit to at least 1 year of service. Attend 4 hours of orientation. <p>PARTICIPATE IN CULTURE AND CONTENT MODEL</p> <p>AFTER-SCHOOL ACADEMY</p> <ul style="list-style-type: none"> Receive training on Higher Achievement culture, expectations, and processes. Participate in daily culture-building activities 94 hours of small group instruction through small-group mentoring in literature, math, and seminar topics 112 hours of supervised homework assistance or academic-themed free time 75 hours of elective activity Participate in occasional special events (e.g., spelling bee, poetry contest) <p>SUMMER ACADEMY</p> <ul style="list-style-type: none"> Receive training on Higher Achievement culture, expectations, and processes. Participate in daily culture-building activities 96 hours of math, literature, social science, and science instruction in small classes 24 hours of elective activity Participate in occasional special events (e.g., spirit week, Olympics of the Mind) Attend three-day university trip <p>COMPLETE EVALUATIONS</p> <ul style="list-style-type: none"> 360 evaluations (twice a year; scholars, families, mentors, teachers) Weekly session feedback forms (mentors) Weekly teacher comment sheets (summer teachers) 	<p>ACADEMIC</p> <ul style="list-style-type: none"> Scholars extend their annual academic learning time 6.15 additional hours beyond time spent in school. Scholars are exposed to challenging and engaging curricula, with a social justice content theme. Scholars receive individualized, targeted academic instruction in small group settings. Scholars complete their homework and have it checked for accuracy. <p>BEHAVIORS/SKILLS/ATTITUDES</p> <ul style="list-style-type: none"> Scholars engage in academic and personal development in a rigorous, supportive learning community. Scholars build relationships with caring, committed, trained adults. <p>OPPORTUNITIES</p> <ul style="list-style-type: none"> Scholars experience opportunities for leadership. Families increase their knowledge of select school enrollment and financial aid processes. Scholars have exposure to local resources and people: museums, expert speakers, and local universities. Scholars participate in academic contests and activities during out-of-school time. 	<p>ACADEMIC ACHIEVEMENT</p> <ul style="list-style-type: none"> Improved standardized test scores Improved report card grades <p>BEHAVIORS/SKILLS/ATTITUDES</p> <ul style="list-style-type: none"> Improved school attendance and on-time arrival. Improved preparation for class. Increased “love of learning.” Increased optimism about future academic and personal opportunities. More able to write well More able to speak thoughtfully/with poise Better active listening and investigative questioning More able to interact productively with others Willingness to provide positive leadership More motivated/confidant for academic challenges/ excellence Increased voluntary academic participation <p>OPPORTUNITIES</p> <ul style="list-style-type: none"> Advancement to college preparatory high school programs (public, charter, parochial, and private) with scholarship when needed Increased opportunities for classroom, school, and community leadership 	<p>ACADEMIC ACHIEVEMENT</p> <ul style="list-style-type: none"> Annual and longitudinal improvement on standardized tests administered by the school district Annual and longitudinal improvement on ELA and math report card grades Compare Higher Achievement scholar grades to district averages <p>BEHAVIORS/ SKILLS/ATTITUDES</p> <ul style="list-style-type: none"> Annual and longitudinal improvement of school attendance Annual and longitudinal improvement of school tardiness Improvement of behaviors, skills, and attitudes measured through biannual 360 evaluation Annual program participation and retention rates <p>OPPORTUNITIES</p> <ul style="list-style-type: none"> Annual placement of scholars into college preparatory high school programs Annual amount of tuition scholarships leveraged High school graduation rate of program alumni (pilot) Higher education enrollment and degree attainment (pilot)

Appendix F

Higher Achievement Management Dashboard (Board Level)

Updated 4/10/2010

KPI	Last Updated	Current	Target	Definition
Program Quality Indicators				
Staff retention	2/12/2010	77%	85%	Retention of full time staff
Cost Per Scholar	12/31/2009	\$ 455	\$402	Scholar-related expenses and part-time staff wages
Scholar roster	3.24.2010	457	n/a	Number of active scholars
Center attendance	3.24.2010	85%	85.00%	Average daily attendance
Mentor roster	3.24.2010	511	457	Number of active mentors; target assumes 1:1 ratio
Mentor satisfaction	3.24.2010	4.1	4	Average rating from session feedback form
Scholar Outcomes				
Reading GPA improvement	9.9.2009	47%	50%	% of scholars who improved (or maintained A's) in past year
Math GPA improvement	9.9.2009	50%	50%	% of scholars who improved (or maintained A's) in past year
Attendance rate improvement	9.9.2009	73%	50%	% of scholars who improved (or maintained perfect) in 1 year
Tardiness rate improvement	9.9.2009	73%	50%	% of scholars who improved (or maintained perfect) in 1 year
Reading test score improvement	11.3.2009	58%	50%	% of scholars who improved (or maintained Advanced) in 1 year
Math test score improvement	11.3.2009	63%	50%	% of scholars who improved (or maintained Advanced) in 1 year
Reading GPA - graduates				Change in graduating scholars since program entry
Math GPA - graduates				Change in graduating scholars since program entry
Attendance rate - graduates				Change in graduating scholars since program entry
Tardiness rate - graduates				Change in graduating scholars since program entry
Test score - graduates				Change in graduating scholars since program entry
Placement rate - graduates				% of scholars placed in college prep schools
Financial aid leveraged				Amount of financial aid leveraged by graduating class

Add: comparison to DCPS, ACPS, BCPS, NAEP 8th grade achievement levels

Higher Achievement Operating Plan FY 2010



Higher Achievement Operating Plan FY 2010

Key Priorities

Improve. Expand. Secure. These are the three key words for Higher Achievement's work in FY 2010, 2011 and 2012. We plan to improve the program model to deliver better and more impactful scholar results, expand the staff and system's capacity to implement, evaluate and replicate our program, and secure and sustain a high level of champions and resources to support the work. FY 2008 and 2009 were eras of transformation. Higher Achievement transformed itself from a local service shop to a national organization with local affiliates: Baltimore and DC Metro. Investments from The Atlantic Philanthropies and the Jack Kent Cooke Foundation allowed Higher Achievement to enhance its information system and staffing structure, codify and document its program model, and expand its reach in two additional school districts: Alexandria, VA and Baltimore, MD. At the end of FY 2009, Higher Achievement will have served 600 students – 400 in Washington, DC; 80 in Alexandria, VA, and 120 in Baltimore, MD. The next three years (2010, 2011, and 2012) will be a period of establishing additional centers in DC Metro and Baltimore and replicating in other communities. This growth will be grounded in continuous learning and innovation, increased capacity, and the growth and sustainability of champions and resources.

Key Priorities:

- I. **Implement, assess and improve the program model to generate more impactful scholar outcomes**
- II. **Expand the capacity of staff and systems to deliver, evaluate and replicate the program to serve more communities and scholars.**
- III. **Secure and sustain a growing base of resources and champions to support our work locally and nationally**

Higher Achievement Operating Plan FY 2010

National Operating Plan

I. Implement, assess and improve the program model to generate more impactful scholar outcomes

Goal	Strategies and Activities	Deliverables
<p>All Higher Achievement Centers are implementing a consistent core program model</p>	<ul style="list-style-type: none"> • Incorporate early P/PV findings into core model. • Implement management dashboards. • Assess and act on internal assessment needs. • Revise mentor and teacher training to reflect core model elements. • Develop/solidify national team and EDs as core model experts. • Observe Centers to gauge core model implementation. • Fully implement data integrity/validation practices. • Evaluate and refine staff training to reflect core model (Maximize use of tech tools). • Secure copyright permissions. • Fully incorporate social justice concepts throughout organization. 	<ol style="list-style-type: none"> 1. Quality assessment tool based on core model (qualitative and quantitative info). 2. Refined Center tools that reflect core model (Center, Mentor, ST, ET observation forms; trimesterly). 3. Portfolio program. 4. Definition of social justice themes and how they apply in different areas of the organization . 5. Refined mentor, teacher, staff training modules. 6. Live, web-based support technology. 7. Online video guides. 8. Center video with voiceover. <p>Appendix H</p>
<p>Scholar individualizations and innovations developed at Centers are outcomes-based</p>	<ul style="list-style-type: none"> • Implement system to guide staff innovations. • Refine IAP process for tailoring program elements to individual scholar needs, based on data/outcomes. • Develop system for feedback loop: new innovations to other Centers/affiliates and to National <ul style="list-style-type: none"> ○ Conduct observations ○ Attend meetings ○ Review observation notes and trimesterlies ○ Incorporate cross-affiliate best practice-sharing into annual retreat • Develop procedures for keeping affiliate staff engaged with outside professional development opportunities, national trends, research. 	<ol style="list-style-type: none"> 1. Tool for Center staff to guide innovation design. 2. Refined IAP tool and menu of interventions ("Tracks" for mentors to follow). 3. Protocols for annual review/capture of new innovations. 4. Technology tools to facilitate cross-affiliate info sharing and training. 5. Rich extensions and choices built into lessons (connects to mentor training).

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II. Expand the capacity of staff and systems to deliver, evaluate and replicate the program to serve more communities and scholars

Goal	Strategies and Activities	Deliverables
<p>HA is better prepared to support new affiliate launch activities for the year before and during launch</p>	<ul style="list-style-type: none"> Complete debrief discussions of Baltimore affiliate launch. Document affiliate launch steps, needs, and metrics. Refine existing processes/materials for affiliate launch. 	<ol style="list-style-type: none"> Policies, procedures and supporting materials specific to affiliate launch. "T-minus 12 months to launch" calendar of activities (Best and worst case scenarios). Dashboard metrics specific to launch year. Refined "launch affiliate" staff training task list. Refined annual training calendar.
<p>Organizational capacity is optimized and enhanced by orientation, trainings and professional development that is tested and proven to advance staff capacity and knowledge of the field and increase staff ability to replicate the core model with consistency and quality</p>	<ul style="list-style-type: none"> Implement assessment process to measure effectiveness, knowledge transfer and ROI, especially as it pertains to professional development. Identify and implement key training and professional development activities core to producing scholar outcomes. Enhance corporate culture by deepening the diversity, conflict management and communications training. Develop effective partnerships to improve pipeline of new talent to the organization (e.g., minority hiring, summer teachers, etc.). Enhance usage of SuccessFactors in human resource management and developing systems of accountability for every position. Ensure overall organizational alignment with Board's strategic goals. 	<p>Appendix H</p> <ol style="list-style-type: none"> Enhanced assessment tool to test knowledge transfer and benefit. 360s deployed prior to 2010 semi-annual retreat Annual retreat. Partnerships for summer teacher hiring for each affiliate and/or national.
<p>Systems are efficient, accurate and support national and affiliate work, information sharing and a results and outcomes focused discipline</p>	<ul style="list-style-type: none"> Continue to assess and expand ways the systems enhance staff productivity. Expand ISIS capacity to support outcomes related to parent and teacher engagement – train staff on how to leverage this capacity. Ensure staff are adapting to systems and accessing /receiving key data in a timely and constructive manner. 	<ol style="list-style-type: none"> Improved results on systems questions reflected in the semi-annual assessment. Goal: systems make work easier = avg 4.25 and effective training on systems = avg 4.25 (5 pt scale). Systems Usage Reports (need baseline and periodic).

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	<ul style="list-style-type: none"> • Ensures systems are supporting core model replication as well as best-practice sharing and innovation. • Leverage multiple data systems to support management dashboard and timely access to critical results and outcomes data. • Optimize meeting structure to maximize collaboration and results focus. • Assess National's effectiveness at maintaining strong National/Affiliate relationships. 	
<p>While increasing in scale and size, Higher Achievement continues to be a highly regarded and respected work environment with high employee retention and employee satisfaction rates</p>	<ul style="list-style-type: none"> • Support the work of the National team, ensuring CEO is freed of operational responsibilities and that all Chiefs have the tools, decisions and strategic guidance to maximize their roles. • Assess and incorporate findings from semi-annual employee satisfaction survey. Develop method to enhance information gathering. • Continue to evaluate compensation package and maintain competitiveness in the field. • Expand human resource administrative capacity. 	<p>1. Enhanced staffing plan for National Office 2. 90% staff retention 3. Employee satisfaction survey– average employee response to overall satisfaction at Higher Achievement is 4.25 (5 pt scale.)</p> <p>Appendix H</p>
<p>To maintain brand integrity and ensure consistent messaging both internally and externally by developing internal tools and processes</p>	<p>Strategies</p> <ul style="list-style-type: none"> • Develop a system to track all communications related activities throughout the year. • Regularly monitor the media culling for information about Higher Achievement or information that the organization needs to respond to. • Establish internal communications processes and protocols between national and affiliates. • Establish internal processes for collecting and archiving mentor, scholar and alumni stories. • Create a long-term affiliate support plan. • Establish guidelines for assessing when the organization should leverage an opportunity/respond to items in the news. • Create a feedback system for assessing communications strategies and their effectiveness. 	<p>Deliverables</p> <ol style="list-style-type: none"> 1. Calendar of activities on Sharepoint including: events, press releases, blog launch and updates, major mailings, review of marketing materials, regular outreach to media, newsletter, website updates, daily review of key newspapers, blogs and websites, weekly review of the media, etc. 2. Protocols and processes on sharepoint regarding communications related activities. 3. Database of mentor, scholar and alumni stories. 4. Long-term affiliate support plan that includes an organizational chart, job descriptions and flow of communication. 5. Guidelines/checklist for assessing communications opportunities. 6. Dashboard that reflects usage of various new

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		media and social networking tools, website hits, press hits, etc.
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National Operating Plan

III. Secure and sustain a growing base of resources and champions to support our work locally and nationally

Goal	Strategies and Activities	Deliverables
<p>Groundwork is laid for affiliate launch in 2 new cities</p>	<ul style="list-style-type: none"> • Complete due diligence on targeted launch cities. • Build “pull” to new cities. 	<ol style="list-style-type: none"> 1. Due diligence info packages for targeted cities 2. RFP process for new cities. 3. Relationships with key stakeholders in targeted cities. 4. Local pipelines for new affiliate Executive Directors.
<p>HA contributes to strengthening the field of OST</p>	<ul style="list-style-type: none"> • Continue working with “competition partners” in common areas. • Identify and develop partners who could influence expansion (e.g., PEN). • Present/build relationships at conferences as a high-quality, innovative, research-based model. • Develop board P&P Committee work. • Prepare curriculum for outside promotion/sharing. 	<ol style="list-style-type: none"> 1. Strong standard conference presentations around program, data, volunteers, expansion, training—Appendix H
<p>Increase the financial sustainability of the organization and develop more diverse revenue streams.</p>	<ul style="list-style-type: none"> • Pursue local, state and federal dollars. Focus on renewable revenue streams (SES, 21st Century, Title I) and innovation funds. • Cultivate foundations that are national in scope. • Cultivate new corporate partnerships. • Expand relationships with individuals (e.g. alumni, families, mentors, etc.) that can help meet development goals. • Maintain relationships with and investments from current funders. 	<ol style="list-style-type: none"> 1. Raise \$6.5M by August 2010, \$6.0M for regular operating expenses and \$500K for reserve. 2. Revenue streams will be allocated as follows: foundations 45%, public funding 40%, corporations 10% and individuals 5%. 3. Comprehensive local, state and federal strategy is mapped out and updated quarterly. 4. SES applications completed and submitted for expansion cities. 5. Donors and prospects are actively managed through a standard reporting/grading mechanism and regular development meetings.
	<ul style="list-style-type: none"> • Develop the systems necessary to ensure activities across the whole organization are being leveraged and not replicated. 	<ol style="list-style-type: none"> 1. All development staff are trained and are using Raiser’s Edge. 2. All reports are generated from Raisers Edge. 3. Raiser’s Edge is effectively acting as the detail record for accounting.

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	<ul style="list-style-type: none"> Expand formal partnerships to include those entities and individuals (e.g. Center for Inspired Teaching, ExperienceCorps, etc.) that can help meet both development and program goals. Recruit a prominent national board and local President's Councils with capacity to make or solicit significant gifts. 	<p>4. Raiser's Edge training and reporting system are codified and documented.</p> <ol style="list-style-type: none"> At least one formal (i.e. MOU) national partnership. At least one joint proposal is submitted to a funder. At minimum, two members of Congress are active supporters of the organization and are accessible. <ol style="list-style-type: none"> Board give or get policy is in place and enforced as evidenced by donations from 100% of the board. All board members have a development "toolkit" and are trained on their role in fundraising. A list of "Most Wanted" board members is actively being managed and cultivated by the Board Development Committee and with staff support. An affiliate toolkit is developed that outlines how to manage and leverage a President's Council from start-up to maturity. A short-list of President's Council members in expansion cities are actively being cultivated.
<p>To increase awareness of Higher Achievement and position the organization as a leader in the OST field resulting in:</p> <ul style="list-style-type: none"> Increased donations Steady supply of volunteers Steady supply of scholars and families Increased awareness of middle school issues Opportunities for expansion Opportunities to affect policy 	<ul style="list-style-type: none"> Engage key stakeholders in expansion cities. Identify and define target audiences Develop messages specifically for identified target audiences Establish relationships with key reporters and editors. Regularly communicate with key media outlets, promoting Higher Achievement as a resource to the media on issue-related articles. When appropriate, respond to issue related articles through op-eds and letters to the editor. Research and prioritize new media and social 	<ol style="list-style-type: none"> Anchor funders for new expansion cities have been identified and are being cultivated. List of clearly defined target audiences Message maps by audience Training toolkit for staff and board Media toolkit for affiliates (e.g. press release templates, media lists, advocate/partner list, statistics/facts document, etc.). Media training module for affiliate EDs. Areas of expertise mailing. Media kit in both print and electronic format. New and improved website.

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<p>networking opportunities (e.g. Facebook, Twitter, LinkedIn, YouTube, etc.).</p> <ul style="list-style-type: none"> Redesign and launch the website. Create and launch a blog 	<ol style="list-style-type: none"> 2. Blog that is regularly updated, engaging and relevant. 3. Strategic plan for launching and leveraging at least two new social networking tools. 4. Social networking protocols.
<ul style="list-style-type: none"> Conduct a series of policymaker briefings in key communities (e.g. current and future program sites). Cultivate and steward key members of Congress. Identify key issues and develop and disseminate white papers 	<ol style="list-style-type: none"> 1. A minimum of three briefings: DC Metro, Baltimore and one expansion city. 2. A list of key members of Congress each with a cultivation strategy including the tools necessary to implement the plans. 3. A minimum of two white papers completed and disseminated.
<ul style="list-style-type: none"> Identify and introduce Higher Achievement to advocacy and membership organizations that represent key stakeholders. Seek endorsements from third-party advocates that will give Higher Achievement national credibility. Identify high profile conferences and apply to have key staff participate either as presenters or on panels. Utilize a speakers bureau to attend secondary conferences, participate on panels, speak on radio and television talk shows and generally provide a voice on OST related issues. Participate in third-party national events that are education related and brings visibility to the organization and/or builds a relationship with a key stakeholder group. 	<ol style="list-style-type: none"> 1. Meetings and regular engagement with a minimum of two advocacy organizations. 2. A minimum of two endorsements from nationally recognized third party advocates. 3. Applications submitted to a minimum of three conferences 4. Addition of third-party activities to the communications calendar (e.g. Education Week, National Day of Service, etc.) with organized events and an outreach plan to support them.
<ul style="list-style-type: none"> Assess current marketing collateral: update anything that is out of date and identify gaps - develop materials/products that fill those gaps. 	<ol style="list-style-type: none"> 1. Communications tool kit including: brochures, invitations, flyers, templates (flyer templates, PowerPoint deck, etc.), PowerPoint presentation, and videos.

Higher Achievement Operating Plan FY 2010

DC Metro Operating Plan

I. Implement, assess and improve the program model to generate more impactful scholar outcomes

Goals	Strategies and Activities	Expected Outcomes
<p>Cultivate consistently positive culture and expectations of academic rigor at Centers</p>	<ul style="list-style-type: none"> • Agree on and share clear culture expectations and approaches among all Centers. • Ensure that culture of high expectations and rigor is common across all components of program (mentoring sessions, study hall, summer academy classes, electives, etc.). • Pilot strategies to uniquely engage 7th graders (possibly including service projects, girls/boys facilitated discussion groups, goal-setting and check-ins... ask for scholars' input before deciding on approach) . • Implement AYD Training, see goal 5. 	<ol style="list-style-type: none"> 1. Visible commonly enforced culture expectations at all five centers. To include spirit, excellence, respect, and social justice. Reference AYD principles. 2. 80% of Center observations report proficient or advanced on culture. 3. 95% scholar attendance of active roster. 4. Of scholars identified with school attendance problems, 80% improve. 5. X% retention throughout AFSA and AFSA – SA and throughout SA. 6. Multi-year retention goal.
<p>Bolster structured opportunities to educate and engage parents in the education of their scholar.</p>	<ul style="list-style-type: none"> • Provide ongoing training and support in management, group facilitation, and supervision to full time and part-time staff, mentors, and summer teachers. <ul style="list-style-type: none"> o Monthly Center based staff meetings and mentor check-ins incorporate technical support sessions. o Mentors, full-time staff, and part-time staff actively assist in the facilitation of community meeting, center based events, and gathering time. o Deputy Director/DSO conducts quarterly FT staff trainings on management and supervision. • Define “parental engagement” for Higher Achievement. Research effective parental engagement strategies in the field. • Pilot parent education workshops to promote Culture of learning and academic achievement at Centers, in partnership with 	<ol style="list-style-type: none"> 1. On part-time staff, summer teacher and mentor end-of-year evaluations, 90% report that they would return to Higher Achievement, if available.
	<ul style="list-style-type: none"> • Define “parental engagement” for Higher Achievement. Research effective parental engagement strategies in the field. • Pilot parent education workshops to promote Culture of learning and academic achievement at Centers, in partnership with 	<ol style="list-style-type: none"> 1. Conduct 2-3 center-based workshops with at least 50% of parents to attend. 100% of rising 8th grade parents participate in one on one placement assessment and attend school admissions conference.

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	<p>Scholar Services. Topics to consider: AYD principles, how to be an effective education advocate for your child, understanding the high school landscape, etc. (dependent upon parent input).</p> <ul style="list-style-type: none"> Establish Center-based parent advisory councils at at least two Centers, which advise staff and reach out to larger parent pool. Reformat Back-to-HA night (or Thanksfest, when groups are more settled) to connect mentors and parents. 	<p>1. 30% of families contribute to Center programming-mentoring, planning events, outreaching to other parents.</p> <p>2. Hold at least 3 parent advisory council meetings, with at least 10 parents attending.</p>
<p>Leverage data systems to individualize services for scholars, to account for learning needs</p>	<ul style="list-style-type: none"> Define "red", "yellow" and "green" – to include grades, behavior, and HA attendance. Establish menu of interventions for scholars in each category (red, yellow, green), differentiated by role (mentor, CD, ACD, Achievement Coach). Help needed from curriculum. 	<p>1. At least monthly all scholars are reviewed (with input by center based staff). During AFSA, scholars are flagged as "red", "yellow", or "green".</p> <p>2. Scholar profiles created for 100% of scholars after Summer Academy before AFSA, and shared with mentors and all Center staff.</p> <p>3. For "red-flagged" scholars, IAPs are created and updated each month, and then shared with mentors, achievement coaches, and classroom teachers of consortium schools. Updated monthly until moved to yellow or green.</p> <p>4. Reduce # of red flagged scholars each month by x%. Goal: 70% in green by end of AFSA.</p> <p>5. Use 360s to measure attitude/behavior change... determine baseline, then rate of improvement.</p>
	<ul style="list-style-type: none"> Develop and implement a training and support program for volunteer study hall aides, mentors, and achievement coaches, based on the diagnostics and interventions and AYD. 	<p>1. 80% of mentors are trained within first 2 months of AFSA.</p> <p>2. 95% of Center-based staff are trained within first 2 months of AFSA.</p>

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	<ul style="list-style-type: none"> • Share supplemental material with mentors to better address all scholars' learning levels. Use Sharepoint to disseminate. • Teach basic study habits in orientation week, using Covey framework. • Leverage study hall to reinforce study habits. 	<ol style="list-style-type: none"> 1. At least 50% of scholars improve by 1 letter grade in math or reading. 2. At least 50% improve test scores by 3%.
<p>Improve High School Placement Preparation and Outcomes</p>	<ul style="list-style-type: none"> • Train 8th grade mentors on high school placement process, and their role. • Keep mentors informed of high school placement successes and challenges. • Refine 8th grade Institute and 7th grade parent education conference, based on pilot year experiences. • Restart High School Placement Fair. • Define which DC/Alexandria school programs are "college preparatory" by October 30. 	<ol style="list-style-type: none"> 1. 100% of scholars keep and use agenda books (provided by HA or school or elsewhere) every week in study hall. 1. 80% of 8th grade mentors are trained in high school placement and are active advocates for their scholar.
		<ol style="list-style-type: none"> 1. 80% of 8th graders attend the 8th grade retreat and have common essay completed by October 30th. 2. At least 50 scholars/families attend high school fair. 3. At least 50 scholars/ families attend 7th grade parent education conference. 4. 90% of scholars placed in college preparatory high school (as defined by....).

Higher Achievement Operating Plan FY 2010

DC Metro Operating Plan

II. Expand the capacity of staff and systems to deliver, evaluate and replicate the program to serve more communities & scholars

Goals	Strategies and Activities	Deliverables
<p>Develop an effective leadership and management development plan for staff</p>	<ul style="list-style-type: none"> • Provide deeper training and tools on youth development for full time and part-time staff, mentors, summer teachers. • Specific topics include: AYD, group facilitation, team building and support, accountability to outcome, effective use of staff and resources. 	<ol style="list-style-type: none"> 1. Advancing Youth Development Training DVM trained as AYD facilitator Dir. Of Site Ops & Dir. Of Vol Mgmt develop training modules on youth development for ALL adults by January 30. <ol style="list-style-type: none"> a. 100% DC Metro FT staff trained in AYD b. 100% of active PT staff trained in AYD c. 80% of Mentor Advisory Council trained in AYD 2. Part-time staff retention increases by x%. 3. Mentor retention reaches 60%.
<p>Improve internal communication within and between departments, with community partners and consortia schools</p>	<ul style="list-style-type: none"> • Establish methods and clarify expectations of communication between departments. • Modify meeting structures to increase inter/intra department communication and collaboration. • Maximize capabilities of ISIS and SharePoint as communication tools. 	<ol style="list-style-type: none"> 1. 90% of contacts are logged into ISIS or Raisers Edge within 48 hours. 2. Quarterly temperature check on internal communication in all DC Metro staff meeting.
<p>Enhance the data collection and analysis process</p>	<ul style="list-style-type: none"> • Agree on standard report card analysis and follow-up process. 	<ol style="list-style-type: none"> 1. 100% of report cards collected from consortia schools (quarterly) within 2 weeks of end of advisory. 2. 60% of report cards collected from non-consortia schools within 2 weeks of end of advisory. 3. 100% of received report cards are entered in ISIS, leveraging receptionist, within 3 weeks of end of advisory. 4. Daily attendance calls are placed to families.

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DC Metro Operating Plan

III. Secure and sustain a growing base of resources and champions to support our work locally and nationally

Goals	Strategies and Activities	Expected Outcomes
<p>Raise \$2.5 million budget</p>	<ul style="list-style-type: none"> • Implement 3-year sustainable fund-raising plan, in conjunction with CDO. • Steward and maintain/grow existing donors/funders. • Re-investigate and apply for SES, with backing of OSSE and Board of Education. • Increase government contributions from new federal service grants, education innovations, and stimulus opportunities. • Increase corporate contributions, leveraging Going Places!, mentor employers, and new Alexandria partners. • Pilot young people giving circle. • Re-engage Presidents Council . • Improve mailing lists for events to include broader reach to programmatic and community partners. • Coordinate with national team on media outreach for events. 	<ol style="list-style-type: none"> 1. Meet budget (approximately \$2.5 million), and finish year with surplus of at least \$50K. 2. 70% of revenue is predictable. 3. \$100K in new government resources. 4. \$100K in new corporate resources. 5. 95% of PC Members attend at least two events or meetings. Total PC Giving: at least \$150K. 6. Other Individual Donors to raise at least \$100K. 7. Successfully raise \$500K in benefit/event sponsorships (FY 2009 effort, but recorded in FY 2010). 8. Attendance at Love Poem > 300 people (find new venue). 9. Attendance at Green Apples > 450 people. 10. At least 3 general media hits and 3 education/OST-related media hits.
<p>Expand strategic volunteer recruitment, support, and retention (mentors, study hall aides, one-time events)</p>	<ul style="list-style-type: none"> • Steward existing individual mentors, corporate and university partnerships. • Prioritize 5 new partnerships for mentors and study hall aides (consider government agencies). 	<ol style="list-style-type: none"> 1. Recruit/retain 450 mentors by October 1, 2009. 2. Recruit 50 study hall aides by October 1, 2009. 3. 80% of mentors complete session feedback on-time and receive feedback from ACDs.
<p>Deepen relationships with ACPS and DCPS to increase program efficiency and effectiveness</p>	<ul style="list-style-type: none"> • Deepen relationships with OSSE, DCPS central office and consortia/host school partners to secure: <ul style="list-style-type: none"> o \$\$ o Facilities o Data • Get to know new Alexandria superintendent, 	<ol style="list-style-type: none"> 1. Working with OSSE and DCPS, secure a new data MOU. 2. Secure core subject textbooks from consortia school partners. 3. Update ACPS MOU. Present at least 1 time before the Alexandria School Board

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	<p>understand how HA fits into the new ACPS strategic plan.</p>	<p>by June 2010.</p>
<p>Complete Ward 8 Campaign</p>	<ul style="list-style-type: none"> • Reach \$600K, then launch “public phase” of Ward 8 campaign. • Leverage DC city council and mayoral connections . • Position \$150K from Cafritz as a challenge grant. 	<ol style="list-style-type: none"> 1. Open Ward 8 Center in June 2010. 2. Recruit 40 scholars by May 2010. 3. Recruit 40 mentors by September 2010.

Higher Achievement Operating Plan FY 2010

Baltimore Operating Plan

I. Implement, assess and improve the program model to generate more impactful scholar outcomes

Goal	Strategies and Activities	Deliverables
Establish scholar baseline data around GPAs, test scores, and school attendance	<ul style="list-style-type: none"> Collect report cards from scholars and enter into ISIS. 	<ol style="list-style-type: none"> 100% of scholars' baseline data will be captured and recorded in ISIS.
Establish baseline data around Summer to Fall retention rates and where possible, note reasons for scholars leaving the program	<ul style="list-style-type: none"> Collect fall enrollment data and compare to summer enrollment. Contact families of scholars who have left the program to determine their reason for leaving. 	<ol style="list-style-type: none"> 100% of scholars' retention data from Summer to Fall will be tracked . 85% of scholars who leave the program will have their reason for leaving recorded in ISIS.
Maintain high scholar retention from After School Academy to Summer Academy	<ul style="list-style-type: none"> CD will maintain ongoing contact with family. ACD will ensure strong mentor/mentee relationships. DSO, CD and ACD will provide individualized support plans to scholars who are having difficulty in Higher Achievement. Ensure program has "fun" activities that respond to the needs and interest of scholars (i.e. poll scholars about electives, invite interesting guest speakers, offer field trips when available, etc.) . 	<ol style="list-style-type: none"> 80% of scholars will return to attend Summer Academy.
Establish and maintain relationships with host and feeder schools	<ul style="list-style-type: none"> DSO and CD will maintain ongoing communication with principals at host and feeder schools. Identify other key personnel in each school and determine the best way to develop and maintain strong relationships (i.e. periodic meetings, emails, newsletters, school visits, etc.) . Invite principals, teachers and staff to events, such as Fall Launch, Back to School night, and Spelling Bee to encourage their buy-in to the program. Seek opportunities to honor and give "shout-outs" to school staff to encourage their 	<ol style="list-style-type: none"> DSO and CD will contact principals and other key personnel through quarterly emails, meetings, and/or face to face contact. 40% of staff and stakeholders who have been invited to special events will attend. 100% of principals/schools involved in Higher Achievement will receive some form of recognition or "thank you".

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<p>Cultivate consistently positive culture and expectations of academic rigor at both Higher Achievement Centers</p>	<p>ongoing involvement in the program.</p> <ul style="list-style-type: none"> • Agree on and share clear culture expectations and approaches. • Develop Higher Achievement - Baltimore culture club to help develop enhanced strategies for translating expectations into actions. • Ensure culture of high expectations and rigor is common across all components of program (mentoring, study hall, summer academy, electives, etc.). • Provide ongoing training and support in management, group facilitation, and supervision to full-time and part-time staff, mentors, and summer teachers. 	<ol style="list-style-type: none"> 1. Higher Achievement culture is visible and commonly enforced at both Higher Achievement Centers. 2. Mentors, full-time staff and part-time staff actively assist in the facilitation of community meeting, center events and gathering time. 3. Quarterly management and supervision training of FT staff is conducted by DSO.
<p>Introduce new scholars and families, and reinforce returning scholars, to Higher Achievement culture</p>	<ul style="list-style-type: none"> • Introduce and reinforce culture through explanation and, when possible, demonstration when holding events or interacting one on one with scholars and families (i.e. do ice breakers and activities that demonstrate spirit, excellence and respect). 	<ol style="list-style-type: none"> 1. Culture is explained and demonstrated during scholar/parent orientation session.
<p>Solidify and expand mentor base; provide training; and ensure high mentor retention</p>	<ul style="list-style-type: none"> • Complete recruitment of mentors (60 per Center). • Continue to develop pipeline by working with Mentor Taskforce and seeking opportunities to present program and mentor opportunities at local companies, churches, and universities. • Conduct mentor orientation and training. • Maintain high mentor retention rates by: conducting regular check-ins with mentors to ensure they are receiving the support they need; conducting observations and provide embedded professional development when needed; administering mentor surveys, 	<ol style="list-style-type: none"> 1. 120 mentors are in place for October Center opening. 2. Hold a minimum of 5 taskforce meetings per year. 3. Ensure that 100% of mentors receive orientation training. 4. ACDs will meet with 80% of mentors on a one-on-one basis over the course of the year. 5. 75% of mentors will complete mentor surveys on a regular basis. 6. Host two mentor socials with 50% attendance rate.

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Baltimore Operating Plan

	assessing results and trouble shooting as necessary; and building mentor community through opportunities to socialize and network.	
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Baltimore Operating Plan

II. Expand the capacity of staff and systems to deliver, evaluate and replicate the program to serve more communities and scholars.

Goal	Strategies and Activities	Deliverables
Hire 4 part-time staff (2 Academic coaches and 2 center aids) and 4 elective teachers	<ul style="list-style-type: none"> Post positions on Idealist, Craigslist, HA website, and MANO. Utilize informal networks to announce job openings. Promote positions within host and feeder schools. 	<ol style="list-style-type: none"> Hire 4 part-time staff and 4 elective instructors.
Orient and train all new staff	<ul style="list-style-type: none"> Work with the National training team (RG and JD) to ensure training plan is consistent with needs of staff. 	<ol style="list-style-type: none"> 100% of staff will go through new staff orientation and training.
Improve communications and clarify roles with National	<ul style="list-style-type: none"> Establish methods and clarify expectations of communication between Baltimore and National. Roles and responsibilities of National and Baltimore's administrative staff (ED and Program & Development Associate) will continue to be clarified. Develop meeting structure to ensure Baltimore's participation in necessary meetings in DC. Develop full understanding of capabilities and uses of Sharepoint as communication tools. 	<ol style="list-style-type: none"> Communication structure between Baltimore and DC will be "Cod and Doc" (who to go to for what). All staff will share a common understanding of what each person is responsible for providing. A meeting schedule will be developed (as well as mechanisms for sharing up to the minute information) about key meetings.
Incorporate ISIS into work plan for After School Academy and Summer Academy	<ul style="list-style-type: none"> Ensure all staff are trained on ISIS. 	<ol style="list-style-type: none"> Incorporate quarterly ISIS reports into staff meetings. Create work plan based on ISIS findings prior to the start of Summer Academy (2010).
Use communications to promote mentor recruitment and annual events	<ul style="list-style-type: none"> Work with Communications Manager (EP) and communications consultant to map out plan for reaching mentors and promoting events. 	<ol style="list-style-type: none"> Communications materials will be developed one month in advance of events. Website will include separate Baltimore section.

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III. Secure and sustain a growing base of resources and champions to support our work locally and nationally

Goal	Strategies and Activities	Deliverables
Higher Achievement Baltimore will raise \$400k (FY2010 budget = \$930k with \$550k in committed revenues)	<ul style="list-style-type: none"> • Maintain and grow existing funder/donor relationships. • Maximize Combined Charity Campaign contributions by raising awareness about our program and opportunities to contribute through CCC. • Expand individual donor contributions through biannual ask and Holiday Appeal. • Increase Advisory Board giving. • Access SES funding. • Seek other public funding streams individually and in conjunction with National. 	<ol style="list-style-type: none"> 1. Meet budget and end with \$20k surplus. 2. 70% will come from Foundation giving. 3. 25% will come from public revenue/grants. 4. 5% will come from individuals and companies. 5. 100% of the advisory board will contribute.
Participate in advocacy efforts to increase funding for out-of-school time programs	<ul style="list-style-type: none"> • Participate in Maryland Out of School Time network to ensure State is giving maximum funding to OST. • Participate in Baltimore's City Wide Strategy. 	<ol style="list-style-type: none"> 1. Expand funding "pie" – such as Baltimore City's After School line item. 2. Expand State's Maryland After School Fund.
Craft 3 year sustainability model for Baltimore	<ul style="list-style-type: none"> • Explore current and future trends in public funding. • Calculate current and future scholar status to calculate possible SES reimbursement. 	<ol style="list-style-type: none"> 1. Complete a diversified and achievable sustainability plan by September 2010.
Expand Higher Achievement Advisory Board; clarify board roles; and identify a board member to serve on National Board	<ul style="list-style-type: none"> • Create board development committee. • Meet with Richard and Lynsey to ensure clear roles and responsibilities of advisory board. • Hold an Advisory Board orientation/training to ensure Baltimore Advisory Board is clear on its roles. 	<ol style="list-style-type: none"> 1. 5 new board members will be recruited by December 2009. 2. Cod and doc Advisory Board's role and transition plan to President's council.
Increase HA's presence/influence in the OST landscape	<ul style="list-style-type: none"> • Participate in workgroups and meetings around OST, middle school youth, and other educational areas. • Present at conferences. 	<ol style="list-style-type: none"> 1. Become identified with and knowledgeable about high-quality middle school OST programming due to participation in local work groups (e.g. City Council Education Work

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	<ul style="list-style-type: none"> • Become known by local media as an "expert" in the field (i.e. attend annual Broadcasters meeting and educate media on Higher Achievement and the value of OST). 	<p>Group, BCS Attendance work group, FLBC Transportation work group.).</p> <ol style="list-style-type: none"> 2. Present at 2 or more conferences on the impact of rigorous, extended day programs. 3. Join national consortium of out-of-school time providers to bring recognition to HA, and specifically use the association to leverage opportunities in Baltimore.
Leverage events to engage and inspire	<ul style="list-style-type: none"> • Improve mailing and e-mailing lists for events. • Utilize effective communication mechanisms to reach supporters (i.e. Facebook, Linked In, Twitter, etc.). • Utilize National's communications group to design Baltimore specific materials and invites. 	<ol style="list-style-type: none"> 1. Attendance at Fall Launch is more than 100. 2. Attendance at Spelling Bee is more than 150. 3. Attendance at Love Poetry is more than 150. 4. Hold 3 "friend raiser" events with at least 35 people at each event.
Begin exploring a third host school for Higher Achievement	<ul style="list-style-type: none"> • Research Baltimore City Schools: size, performance, potential feeder schools, SES eligibility, location, etc. • Meet with principals, staff, and parents. 	<p>Appendix H</p> <ol style="list-style-type: none"> 1. Develop a "short list" of schools to revisit when it is time to open a 3rd Academy.

Communications Plan FY 2010- 2012

Organizational Priority	Goals	Strategies	Deliverables
<p>I. Champions and Resources</p>	<p>A. To increase awareness of Higher Achievement and position the organization as a leader in the OST field resulting in:</p> <ul style="list-style-type: none"> - Increased donations - Steady supply of volunteers - Steady supply of scholars and families - Increased awareness of middle school issues - Opportunities for expansion - Opportunities to affect policy 	<p>Target Audiences and Message Development:</p> <ol style="list-style-type: none"> 1. Identify and define target audiences 2. Develop messages specifically for identified target audiences <p>Media Relations:</p> <ol style="list-style-type: none"> 3. Establish relationships with key reporters and editors. 4. Regularly communicate with key media outlets, promoting Higher Achievement as a resource to the media on issue-related articles. 5. When appropriate, respond to issue related articles through op-eds and letters to the editor. <p>New Media:</p> <ol style="list-style-type: none"> 6. Research and prioritize new media and social networking opportunities (e.g. Facebook, Twitter, LinkedIn, YouTube, etc.). 7. Redesign and launch the website. 	<ul style="list-style-type: none"> • List of clearly defined target audiences • Message maps by audience • Training toolkit for staff and board <ul style="list-style-type: none"> • Media toolkit for affiliates (e.g. press release templates, media lists, advocate/partner list, statistics/facts document, etc.). • Media training module for affiliate EDs. • Areas of expertise mailing. • Media kit in both print and electronic format. <ul style="list-style-type: none"> • New and improved website. • Blog that is regularly updated, engaging and relevant. • Strategic plan for launching and leveraging at least two new social networking tools.

Appendix J

Communications Plan FY 2010- 2012

Organizational Priority	Goals	Strategies	Deliverables
		<p>8. Create and launch a blog.</p> <p>Public Affairs:</p> <p>9. Conduct a series of policymaker briefings in key communities (e.g. current and future program sites).</p> <p>10. Cultivate and steward key members of Congress.</p> <p>11. Identify key issues and develop and disseminate white papers</p> <p>Stakeholder Outreach:</p> <p>12. Identify and introduce Higher Achievement to advocacy and membership organizations that represent key stakeholders.</p> <p>13. Seek endorsements from third-party advocates that will give Higher Achievement national credibility.</p> <p>14. Identify high profile conferences and apply to have key staff participate either as presenters or on panels.</p> <p>15. Utilize a speakers bureau to attend secondary conferences, participate</p>	<ul style="list-style-type: none"> • Social networking protocols. • A minimum of three briefings: DC Metro, Baltimore and one expansion city. • A list of key members of Congress each with a cultivation strategy including the tools necessary to implement the plans. • A minimum of two white papers completed and disseminated. • Meetings and regular engagement with a minimum of two advocacy organizations. • A minimum of two endorsements from nationally recognized third party advocates. • Applications submitted to a minimum of three conferences. • Addition of third-party activities to the communications calendar (e.g. Education Week, National Day of Service, etc.) with organized events and an outreach plan to support them.

Communications Plan FY 2010- 2012

Organizational Priority	Goals	Strategies	Deliverables
		<p>on panels, speak on radio and television talk shows and generally provide a voice on OST related issues.</p> <p>16. Participate in third-party national events that are education related and brings visibility to the organization and/or builds a relationship with a key stakeholder group.</p> <p>Materials Development:</p> <p>17. Assess current marketing collateral: update anything that is out of date and identify gaps - develop materials/products that fill those gaps.</p>	<ul style="list-style-type: none"> Communications tool kit including: brochures, invitations, flyers, templates (flyer templates, PowerPoint deck, etc.), PowerPoint presentation, and videos. <p align="right">Appendix I</p>
<p>II. Capacity</p>	<p>A. To maintain brand integrity and ensure consistent messaging both internally and externally by developing internal tools and processes.</p>	<ol style="list-style-type: none"> Develop a system to track all communications related activities throughout the year. Regularly monitor the media culling for information about Higher Achievement or information that the organization needs to respond to. Establish internal communications processes and protocols between national and affiliates. Establish internal processes for 	<ul style="list-style-type: none"> Calendar of activities on Sharepoint including: events, press releases, blog launch and updates, major mailings, review of marketing materials, regular outreach to media, newsletter, website updates, daily review of key newspapers, blogs and websites, weekly review of the media, etc. Protocols and processes on sharepoint regarding communications related activities. Database of mentor, scholar and alumni

Communications Plan FY 2010- 2012

Organizational Priority	Goals	Strategies	Deliverables
		<p>collecting and archiving mentor, scholar and alumni stories.</p> <ol style="list-style-type: none"> 5. Create a long-term affiliate support plan. 6. Establish guidelines for assessing when the organization should leverage an opportunity/respond to items in the news. 7. Create a feedback system for assessing communications strategies and their effectiveness. 	<p>stories.</p> <ul style="list-style-type: none"> • Long-term affiliate support plan that includes an organizational chart, job descriptions and flow of communication. • Guidelines/checklist for assessing communications opportunities. • Dashboard that reflects usage of various new media and social networking tools, website hits, press hits, etc.