



Strategic Plan: 2011 – 2014

Growth Capital: \$15M



BELL Strategic Plan

2011-2014

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A. Executive Summary

BELL exists to transform the academic achievements, self-confidence, and life trajectories of children living in under-resourced, urban communities. Because it believes in the tremendous potential of all children to excel, BELL recognizes them as scholars. Through its summer learning and after school enrichment experiences, BELL is helping more than 10,000 children read by the end of the third grade, transition successfully into middle and high school, and increase their college- and career-readiness.

Research shows that the BELL Summer model significantly increases students' academic skills and parental engagement, and is the only program with proof of its ability to replicate with quality. Instead of losing skills to summer learning loss, scholars gain skills during the BELL Summer program and enter school in the fall ready to excel. During the school year, the extra time-on-task scholars spend in BELL After School accelerates their learning and increases their performance in school. BELL's impact has been shown to increase in-school attendance and on-time promotion rates for at-risk students. Its impact on student performance has helped turn around schools. Today, the organization partners with parents, schools, and school districts, and is serving scholars and their families in five states (GA, MD, MA, MI, and NY).

BELL seeks to expand its impact to reach more scholars, schools, and communities, and to set the standard for quality and outcomes for extended learning programs throughout the country. In the first phase of its growth plan (2007 – 2010), BELL served a total of 34,000 students across five states and developed a partnership model, strong teams, and scalable systems to drive its next growth phase (2011 – 2014). Now, to further advance its mission, BELL is raising the \$15M in growth capital to reach 50,000 students across more than 250 schools in nine states over the next four years. Growth capital will enable BELL to pursue expand enrollment, further increase its impact and evidence base, and strengthen its capacity required for long-term sustainability.

In addition to its direct impact on students, families, and schools, BELL seeks to validate a new model for using extended learning experiences to increase student achievement and turn around low-performing schools. The organization's success will help unlock new public funding for evidence-based models and increase access for high-need students to the high-quality educational experiences currently unavailable in struggling communities.

B. Industry and Market Analysis

Market Context and Need

BELL believes that all children can excel, graduate from college, and fulfill their potential as scholars and leaders. That's why BELL pursues its mission to increase the academic achievements, self-confidence, and life opportunities of children living in under-resourced, urban communities.

Today, millions of children throughout the country lack access to the educational opportunities they need to succeed. Overcrowded schools, a lack of educational resources in urban neighborhoods, and a culture of low expectations produce chronic trends of academic underperformance that are particularly pronounced for high-need students – those coming from low-income families and attending low-performing schools. Last year, for example, 83% of 4th graders from low-income families were not proficient in reading.¹ Years from now, barely half of these students are projected to graduate from high school, and far fewer from college.

This educational challenge is not insurmountable. Countless strategies are being tested, refined, and rolled out in schools throughout the country to ensure all children succeed in school and in life. One such promising practice is the provision of high-quality expanded learning opportunities for high-need students. The basic idea is that more time on task results in greater academic outcomes for students, particularly for high-need students. In the last two decades, afterschool programs became a respected resource known to improve student performance. BELL has been a part of that movement, and focused its previous growth plan (2007-2010) on expanding the BELL After School model. New studies have shown, however, that high-quality summer learning experiences may be even more important to ensure sustained student success.

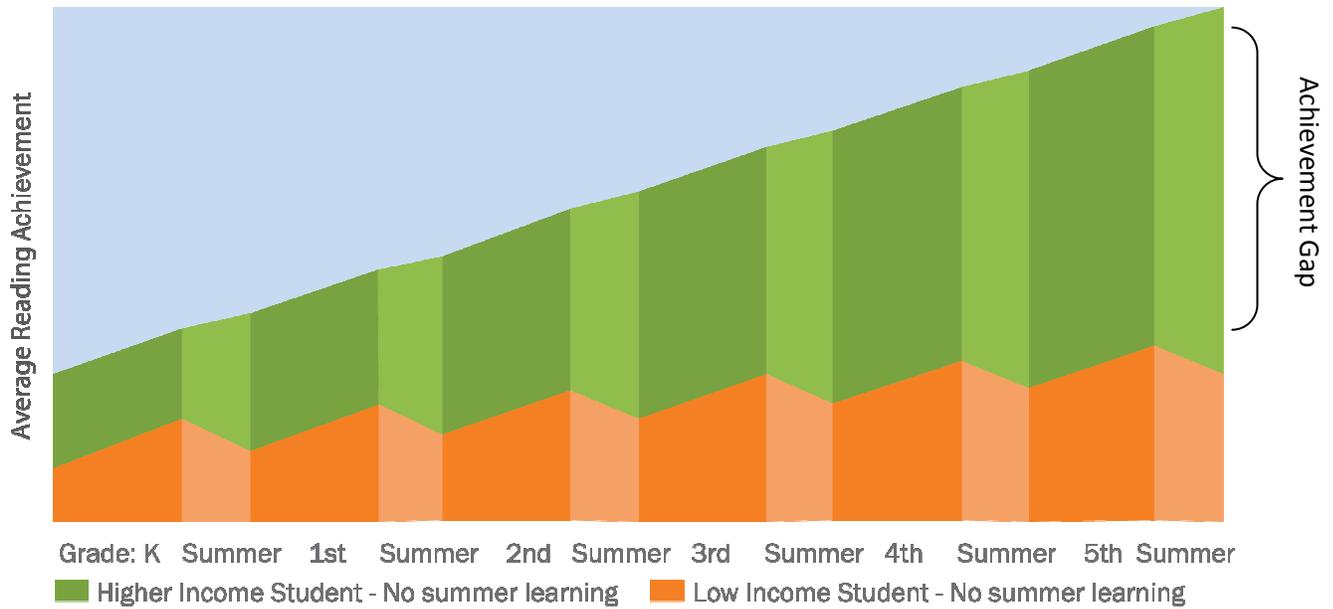
During the summer, students move from one grade to another, and transition from elementary to middle and high school. Research shows that high-need students lose two months' grade-equivalent skills during the summer because few educational resources in their homes and fewer are unable to access structured learning activities outside of the home.² Conversely, students from higher-income families tend to gain skills by participating in camps or other summertime activities. The difference in learning caused by a lack of summer learning activities in grades K-8 accumulates each year, ultimately accounting for 66% of the academic achievement gap between low-income and higher-income ninth grade students. Summer learning loss is also directly linked to whether students attend college preparatory classes, graduate high school, and attend four-year colleges.³

¹ 2009 National Assessment of Educational Progress (NAEP)

² Cooper, H., Nye, B., Charlton, K., Lindsay, J., & Greathouse, S. (1996). The effects of summer vacation on achievement test scores: A narrative and meta-analytic review. *Review of Educational Research*, 66, 227-268.

³ Alexander, K. L., Entwisle, D. R., & Olson, L. (2007). Lasting Consequences of the Summer Learning Gap. *American Sociological Review*, 72.

Cumulative Impact of Summer Learning Loss



Current and Projected Demand & Ecosystem Analysis

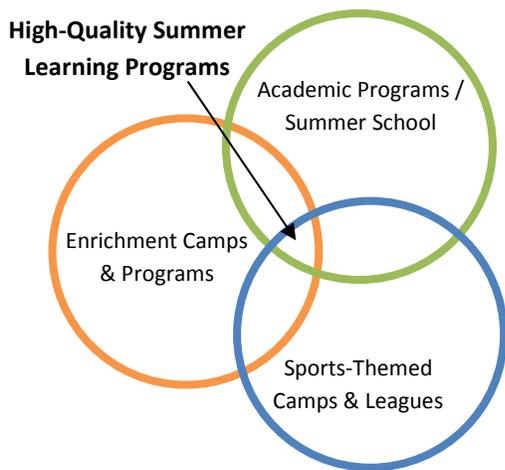
BELL is working to make high-quality summer learning experiences available to the children and families who need them most. Despite the importance of summer learning in narrowing the achievement gap, the vast majority of students lack such educational experiences. One recent analysis showed that only 1 out of 4 children participated in some form of formal summer learning activity (14.3 million children), with only 1 out of 20 children from low-income families participating.⁴ Another analysis showed that parents of another 30% of children (18.5 million children) would participate if high-quality programs were available to them. Cost, access, and convenience are the most commonly-cited reasons behind such low participation rates.

BELL targets a specific subset of this overall need. It delivers its BELL Summer and BELL After School program models for high-need children attending the lowest-performing schools. There are 15,000 schools considered chronically low-performing according to federal standards, and these schools serve 10 million students. Students attending these schools are typically performing below grade-level and require more time-on-task to attain grade-level proficiency, stay connected and engaged in school, graduate, and complete a college degree.

Given the proven impact that high-quality expanded learning programs have on student performance, attitudes, and behaviors, BELL shares the belief held by many educators and parents that such programs should be a core part of education in these schools and made available to all students who need them. In the last two decades, afterschool programs have risen in prominence thanks in large part to new supportive public policies and associated public funding. Access to high-quality summer learning programs has lagged behind. Today, students in low-performing schools rely on a patchwork of organizations that offer a wide variety of models. Schools, parks and recreation agencies, child care centers, and community- and faith-based organizations typically offer summer and afterschool programming targeted to

⁴ Meyer, D., Princiotta, D., & Lanahan, L. (2004). *The Summer After Kindergarten: Children's Activities and Library Use by Socioeconomic Status*. (NCES 2004-037). Washington, DC: National Center for Education Statistics.

disadvantaged youth. Programs vary in their focus, dosage, and quality. Examples include remedial summer school, sports-themed camps and leagues, and enrichment programs. The summer learning program most familiar to BELL’s target audience is the typical district-implemented remedial summer school program. Such programs have generally not been found to be effective because they lack the comprehensive approach provided by high-quality summer learning programs and reach a small fraction of the student population. Yet, as noted above, existing programs are unable to meet even a small fraction of the demand for high-quality programming, and few provide comprehensive models that include academic support, deliver enrichment, and keep kids active and healthy when school is not in session.



High-Quality Summer Learning	Summer School
Includes educational, enrichment, and recreational activities	Solely include academic instruction
Blends remediation with enrichment activities and more advanced curricula	Focused on remediation and review
Attended by students of varied skill levels	Attended by low-performing students
Voluntary	Frequently mandatory
Takes place over a full day	Takes place over a half day

Investments in summer learning may well prove to produce a greater return on investment than investments in additional school-year learning. During the school year, students continue to learn in school regardless of whether or not they participate in afterschool programs. But during the summer, the vast majority of at-risk students don’t have any options for learning. Because of the impact delivered by programs such as BELL Summer, state and local education agencies are showing an increased interest in working with community-based organizations to leverage resources and deliver higher-quality program to students at scale. Recognizing that schools alone have not been able to meet this need, BELL and its partners have shown that by combining public and private investments, they can scale BELL’s proven program models and impact thousands of high-need students. In the last year alone, new public funding commitments from school districts such as Augusta, Baltimore, Cincinnati, Detroit, Pittsburgh, and Springfield created more than 85,000 new slots in high-quality summer learning programs throughout the country. State taskforces in California, Rhode Island, Kentucky, and New Jersey are working to advance legislation aimed at further increasing funding and access for high-need students. Federal programs such as AmeriCorps and the Race to the Top Competition are highlighting summer learning as a priority for turning around low-performing schools. A major national research initiative led by The Wallace Foundation is examining the impact of high-quality summer learning to further strengthen the evidence base needed to spur broad-scale adoption of high-quality models.

With strong evidence of impact, an effective partnership model, and a proven ability to replicate its programs with high quality, BELL is uniquely positioned to provide summer and afterschool solutions for thousands of high-need students attending low-performing schools. New evidence resulting from BELL's evaluation plan will further strengthen the appeal of summer learning to educators and policy makers, while BELL's approach continues to inspire similar models in more and more communities.

C. Theory of Change & Strategy

About BELL

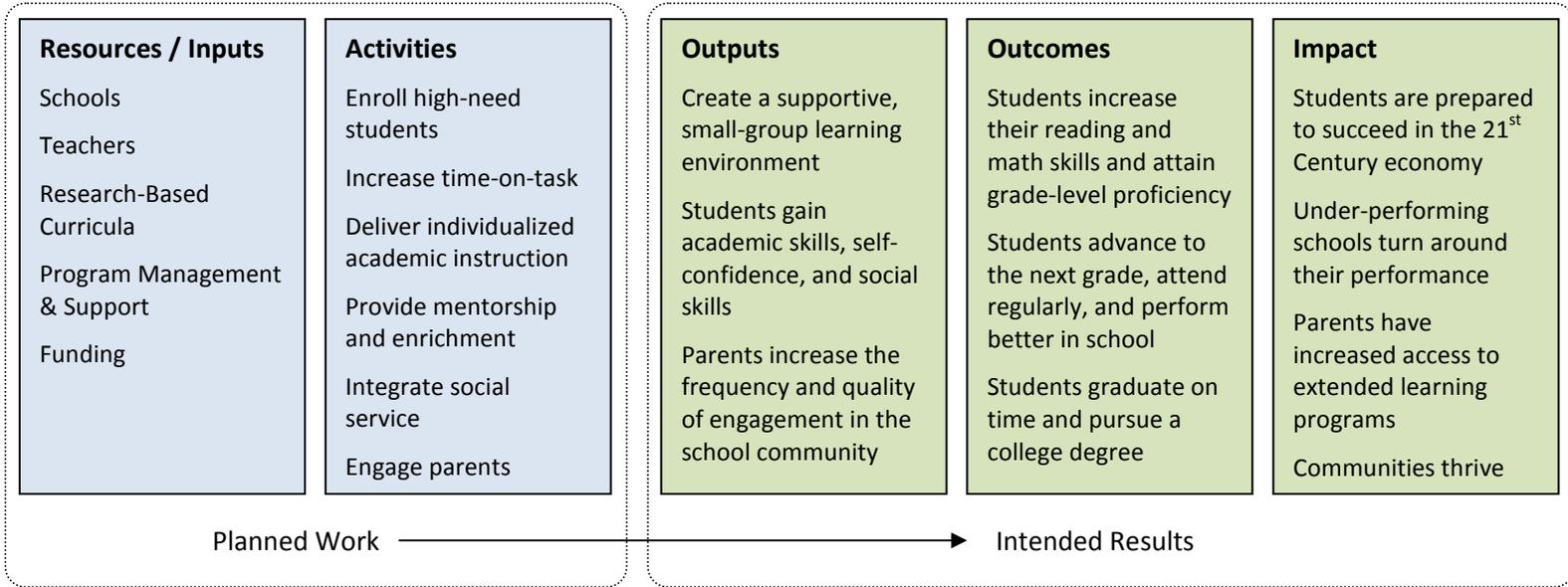
BELL is a nonprofit organization created to increase the academic achievements, self-concept, and life opportunities of children in under-resourced schools and communities. Through its summer learning and after school enrichment experiences, BELL is helping high-need children read by the end of the third grade, transition successfully into middle and high school, and increase their college- and career-readiness. BELL programs combine rigorous academic instruction with mentorship, social enrichment, and civic engagement to accelerate learning, increase engagement in school, and help students succeed at key points in their academic careers. Scholars learn to read and compute proficiently by the end of third grade, an important juncture when students shift from learning to read to reading to learn. The BELL Summer and BELL After School programs help scholars transition successfully from elementary to middle and middle to high school by exposing them to grade-level content and pairing them with mentors who develop scholars' social skills, leadership skills, and determination to graduate from college.

For nearly 20 years, BELL has played an important role in delivering extended learning opportunities to thousands of children. In 2010, BELL is mobilizing a corps of more than 1,500 high-performing teachers, paraprofessionals, and college students to deliver summer and after school learning activities to more than 10,000 scholars in Augusta (GA), Baltimore (MD), Boston and Springfield (MA), Detroit, (MI), and New York City (NY).

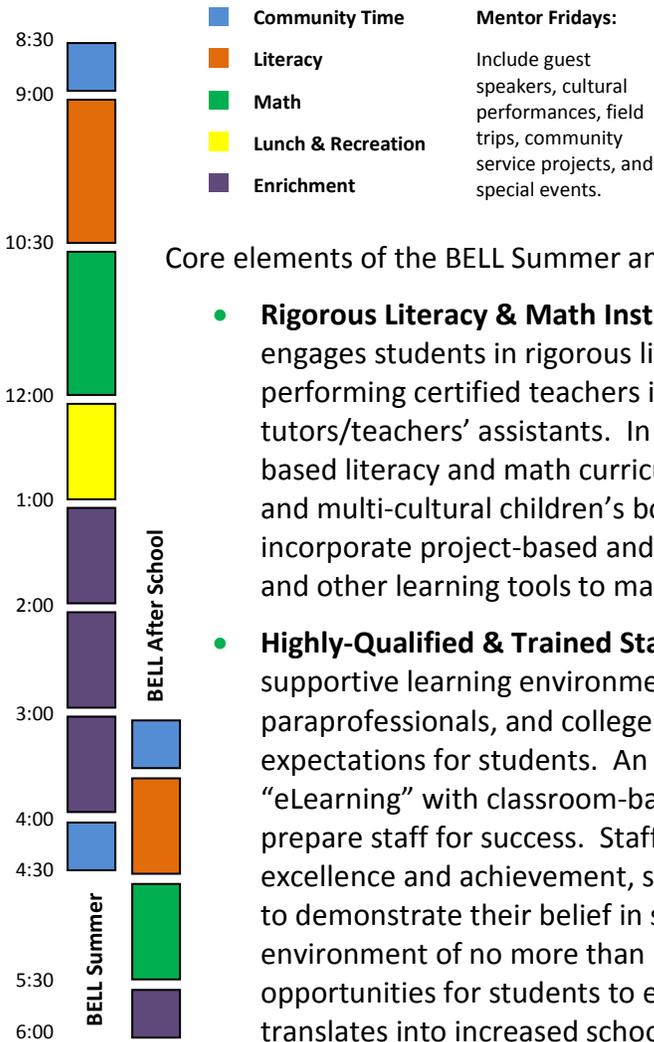
Theory of Change

BELL's theory of change is grounded in the belief that all students can excel when they participate in high-quality educational opportunities. The organization partners with schools, extends learning time in the summer and after school, provides research-based program elements that are proven to accelerate learning, and actively engages parents. As a result, BELL programs help at-risk students gain the academic skills they need to succeed in school; the self-efficacy they need to make healthy choices and set ambitious college and career goals; and the resiliency they need to maintain a positive and productive course in life. Over time, by increasing the academic and social performance of high-need students, BELL narrows the achievement gap between students from low-income families and their higher-income peers, turns around school-wide performance, and reverses the chronic trends of academic under-performance that persist throughout the country.

BELL Theory of Change



BELL Program Schedules



Core elements of the BELL Summer and BELL After School program models include:

- **Rigorous Literacy & Math Instruction:** To increase student achievement, BELL engages students in rigorous literacy and math instruction, delivered by high-performing certified teachers in a co-teaching model with highly-trained tutors/teachers’ assistants. In a small-group setting, educators implement research-based literacy and math curricula aligned with state and national learning standards, and multi-cultural children’s books and other educational resources. Curricula incorporate project-based and experiential learning activities, culturally-diverse texts, and other learning tools to make learning relevant and engaging for all students.

- **Highly-Qualified & Trained Staff of Educators:** BELL programs cultivate a positive, supportive learning environment. BELL carefully screens and hires teachers, paraprofessionals, and college students who share the organization’s high expectations for students. An award-winning training program pairs internet-based “eLearning” with classroom-based training and coaching from veteran teachers to prepare staff for success. Staff members are trained to promote a culture of excellence and achievement, setting high expectations and calling students “scholars” to demonstrate their belief in students’ potential. Students learn in a small group environment of no more than 10 students per educator. Programming provides opportunities for students to experience success and develop a love of learning that translates into increased school attendance and performance.

- **Mentorship:** BELL programs strengthen students' connections to school and learning and increase their college and career aspirations. Emphasis is placed on developing strong, supportive relationships between young adult tutors and teachers' assistants and scholars to increase their self-esteem and aspirations to graduate from college. Throughout the course of BELL programs, mentors work with the same group of students and inspire students' personal goals. For example, during daily community time, staff talk with scholars about college and career opportunities. During "Mentor Days," they engage scholars in service learning and connecting them to their community through field trips.
- **Enrichment:** BELL helps develop students' 21st century skills by providing enrichment courses on topics such as science, entrepreneurship, healthy lifestyles, and leadership. Scholars engage in educational field trips, cultural celebrations, and community service and apply academic skills in solving real-world challenges.
- **Parental Engagement:** More than any other factor, including family income level, parental engagement is the greatest predictor of student success. That is why BELL involves parents in the education process through orientation activities, parent-teacher nights, and regular workshops that help parents understand their child's strengths and weaknesses, engage in program activities, and access the resources they need to support their child's holistic development.
- **Measurement:** BELL is a leader in using data to drive instruction. BELL uses standardized diagnostic tests to identify scholars' academic needs and quantify scholars' academic gains. An innovative, web-based assessment system prescribes individualized learning plans, and produces progress reports for parents, teachers, and principals. A suite of metrics ensures consistency and efficiency of service delivery.

Scholar, School & Community Impact

BELL's impact is evident through student achievement, school performance, and community engagement.

Impact on Students

- **Increase Student Achievement:** As of 2010, BELL is reaching 10,000 high-need scholars in nine school districts. In BELL Summer and BELL After School, scholars are improving their literacy and math skills, according to standardized diagnostic tests.
 - ✓ An independent, random-assignment study of BELL Summer conducted by the Urban Institute demonstrates that students enrolled in BELL Summer increase their reading skills.
 - ✓ In 2010, scholars gained five months' grade-equivalent skills in the six-week BELL Summer program. As a result, they entered the next grade ready to succeed at grade-level proficiency.
 - ✓ In the 2009-2010 BELL After School program, scholars outpaced national norms in acquiring new literacy skills. As a result, they caught up to their peers and narrowed the achievement gap.

- ✓ When students attain grade-level proficiency in reading and math, school teachers can spend more time helping students gain new skills.

- **Improve Students' Attitude Toward School and Engagement in Learning:** Last year, more than 80% of BELL scholars demonstrated an improved attitude toward school and learning; an increased determination to enroll in college; and an increased understanding of college-related goals.

Impact on Schools

- **Increase Students' In-School Performance:** According to school and district partners, BELL scholars attended school more often, scored higher on state tests, and were promoted to the next grade at a higher rate than their peers.
- **Turn Around Low-Performing Schools:** By working with schools and school districts to improve the performance of a critical mass of high-need students, BELL's program models improve schools' overall performance. Last year, for example, 14 of BELL's partner schools in New York City (45% of all of BELL's partner schools in the city) came off the *Chancellor's Schools In Need of Improvement* list.
- **Turn Around Expectations:** BELL's impact on student performance and its engagement of teachers transform the culture of partner schools. Teachers begin calling all students "scholars" as expectations for student achievement rise.

Impact on Communities

- **Replicate with Quality:** In 2007, BELL reached 1,350 scholars during the summer, and scholars gained an average of 3 months' skills. In 2010, BELL reached more than 7,000 scholars, and scholars gained 5 months' skills.
- **Increase Parental Engagement:** Independent evaluation results show that parents of BELL scholars read more frequently with their children at home and attend more school-related events than parents of children who do not participate in BELL programs.



Evidence of Impact

An independent, rigorous study of the BELL Summer program model by researchers from the Urban Institute found strong evidence of impact. The study used random assignment across sites in Boston and New York City. Its evidence meets the highest standards for scientific rigor.

Student Achievement: Participation in BELL Summer had a positive and statistically significant impact on reading achievement, particularly for treatment group students who fully participated in the BELL program ($p < 0.05$, effect size = 0.14).

Parent Engagement: Participation had a positive and statistically significant impact on parents' encouraging their children to read ($p < 0.05$, effect size = 0.15) and their frequency of reading to their children at home ($p < 0.05$, effect size = 0.21).

Engagement in Summer Activities: Parents in the treatment group reported a 50% increase in the hours per week they engage in reading and other academic activities at home compared to the control group. Participants spent fewer hours watching TV and playing computer games ($p < 0.05$, effect size = 0.66).

Replication: Findings related to program replication indicated consistency in implementation across school sites and cities, including fidelity to the program model, consistency in quality, and regularity in student engagement.

BELL's Strategic Growth Plan

In high demand from parents and schools, proven effective, and ready to scale, BELL seeks to grow its impact, particularly through summer learning. BELL's evidence base demonstrates that its greatest impact lies in summer learning, and its recent success in partnering with schools and districts to scale the program creates a new model for further expanding its reach.

Over the next four years, BELL seeks to partner with more schools and districts, establish its programs in more communities, and reach more scholars. Existing school and district partners are located in Augusta (GA), Baltimore (MD), Boston and Springfield (MA), Detroit (MI), and New York City (NY). Additional schools and districts in Flint (MI), Minneapolis (MN), Richmond (CA), Worcester (MA) and in other communities are interested in partnering with BELL.

Specifically, BELL and its school and district partners intend to deliver the BELL Summer and BELL After School program models for high-need students in persistently low-performing schools. BELL and its partners seek to mobilize resources that already exist in their communities - teachers, college students, school space, and public and private funding - to accelerate student achievement and turn around school performance.

BELL seeks to invest \$15M in growth capital to achieve the following goals:

- **Sustainable Growth:** Expand impact to reach 50,000 students (total) in current regions and new regions. In doing so, it seeks to further increase student achievement, turn around low-performing schools, and advance long-term sustainability.
- **Impact & Evidence Base:** Strengthen BELL programs and outcomes by adding science and health curricula to help students get ahead of the curve; disseminate best practices to increase the quality of summer learning programs throughout the country; and generate additional evidence of impact on student and school performance.
- **Capacity:** Expand ability to deliver world-class programming at scale by leveraging information technology to refine core systems; strengthen communication activities; and inform local and national efforts to strengthen summer learning policy.

These goals represent a second phase of a strategic plan launched in 2007. In an earlier phase, BELL raised \$17.5M in growth capital to build capacity and grow over the period 2007-2010. Major investors included the Edna McConnell Clark Foundation, the Atlantic Philanthropies, the Jack Kent Cooke Foundation, and the Richard & Susan Smith Family Foundation. During Phase I, BELL created its public-private partnership model and replicated the model to deliver its programs at scale in several school districts. BELL also built centralized teams and systems to support programming at scale, and created a strategic cash reserve to reduce financing needs and fees. Outputs and outcomes expected from Phase II of its plan include:

Outputs	Measure
<p>Sustainable Growth</p>	<ul style="list-style-type: none"> • BELL will expand its programs to reach more than 50,000 students (total) in current regions and new regions in the next four years. • The organization will launch its programs in at least three new regions. • BELL will increase the number of school partners it works with from 70 schools in 2010 to more than 100 in 2014. • BELL will attain annual revenue and expense targets and make modest contributions to its strategic cash reserve.
<p>Impact & Evidence</p>	<ul style="list-style-type: none"> • BELL will deliver its summer learning program for 6.5 – 8 hours per day, 5 days per week, for 5-6 weeks for a total of 162.5 – 240 hours of programming. • BELL will deliver its afterschool program for 2.5-3 hours per day, 3-5 days per week, for 20-30 weeks for a total of 150 – 400 hours of programming. • More than 6,000 educators will hone their skills through BELL’s training program, including more than 3,000 college students who will gain real-world experience engaging high-need students. • BELL will roll out strong enrichment curricula in areas such as health and science. • BELL will rigorously collect data on student performance, engagement, and program quality, and share progress with parents, teachers, and principals to inform instruction and support. • BELL will produce evaluation reports and other publications to increase quality and access for high-need students and families.
<p>Capacity</p>	<ul style="list-style-type: none"> • BELL will launch new professional development programs for its functional teams and leaders and create new training modules for program staff. • BELL will roll out new software and hardware that facilitates efficient scholar enrollment, attendance tracking, staff management, and compliance. • BELL will articulate a new marketing strategy and create a communication function to increase its capacity to reach parents, teachers, principals, and other constituents.

Outcomes	Measure
<p>Sustainable Growth</p>	<ul style="list-style-type: none"> ● BELL will access renewable public funding through the replication and expansion of its partnership approach. ● BELL’s cost per scholar will decrease by 10-15%. ● BELL will attain sustainability thresholds for its regional and national operations.
<p>Impact & Evidence</p>	<ul style="list-style-type: none"> ● BELL seeks the following outcomes from its programs: <ul style="list-style-type: none"> ● Scholars will increase their literacy and math skills as a result of their engagement in BELL programs. <ul style="list-style-type: none"> ○ Scholars in BELL Summer will gain at least three months’ grade-equivalent literacy and math skills in BELL Summer. ○ At least 65% of scholars will outpace national norms in acquiring new academic skills. ✓ Scholars will increase their self-concept and improve their attitude toward school and learning. ✓ Scholars will attend school regularly, advance to the next grade, and graduate on time. ✓ Parents will become more engaged in their children’s education by communicating more with their child’s school-year teacher, reading more frequently with their children, and attending more school-related events. ● BELL strives to attain program quality metrics and help other organizations deliver high-quality programs to high-need students. A few example of quality metrics expected from BELL programs include: <ul style="list-style-type: none"> ✓ Scholars will maintain average daily attendance rates of at least 70%. ✓ Program sites will maintain average quality ratings of at least 15 on a 20-point scale. ✓ Program sites will maintain average scholar-to-educator ratios of no more than 10:1. ● The completion of a second rigorous independent evaluation will make BELL the only provider of summer learning programs in the nation to have evidence of impact in reading, math, and in-school performance. Such evidence is essential for unlocking new sources of public funding and informing new policies to expand access to high-quality summer learning programs throughout the country.
<p>Capacity</p>	<ul style="list-style-type: none"> ● BELL will increase retention of high-performing staff, leading to even stronger program quality and outcomes. ● BELL will increase operating efficiency by leveraging information technology, driving down the cost of program management and increasing the time and resources directed at helping children excel. ● BELL will increase its ability to communicate with parents, teachers, school leaders, and community members. ● BELL will become more deeply integrated in the schools and communities in which it works.

Projected Impact

Ultimately, BELL is working to increase the role of extended learning programs in public education. The reauthorization of the Elementary and Secondary Education Act, the Social Innovation Fund, the Investing in Innovation Fund, Promise Neighborhoods, and the Race to the Top Fund all represent new, major initiatives designed to launch the next generation of education reform strategies. BELL and its partners believe extended learning should be one such strategy to be replicated and scaled nationally.

BELL's impact, and the work with its partners, are inspiring new approaches to extended learning policy and funding. School districts are increasingly willing to direct public funding to support summer learning and afterschool programs as a core strategy for increasing student achievement. They are also recognizing that such programs afford opportunities to further develop the skills of teachers, provide practicum experience for aspiring educators, and more deeply engage and communicate with parents.

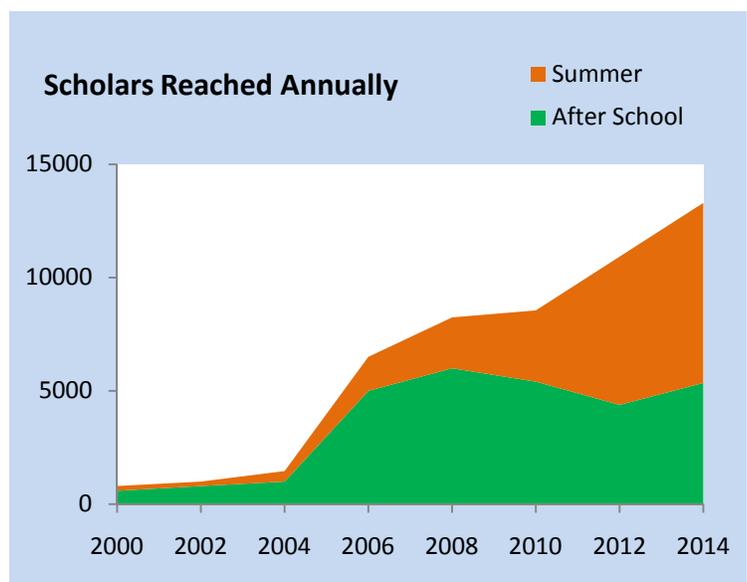
BELL's extended learning strategy is already being used by nine school districts to drive student achievement. With adequate growth capital, BELL can leverage its evidence base, experience, and infrastructure to replicate this approach in more schools and districts, change the lives of thousands of children, and cultivate the broad public support needed to ensure that millions more can access the high-quality summer and afterschool programs they need to excel. BELL believes all communities already have the capacity to deliver high-quality summer learning experiences to youth, and that its goal is to demonstrate one powerful model of leveraging schools, parents, community-based organizations, and others to make it happen at scale.

D. Scaling Plan

Strategy

BELL pursues a strategic plan to increase student achievement, engage parents in their child's education, and turn around failing schools. This plan focuses on taking to scale BELL's proven approach to partnering with schools and public school districts and leveraging summer and after school time to increase student achievement. Specifically, to scale its programs BELL will:

- **Secure Growth Capital:** BELL has generated approximately \$5M in growth capital to jump-start this strategic plan, and continues to pursue additional growth capital from several private sources achieve its goals. As noted above, growth capital will help launch new programs while further strengthening BELL's quality, capacity, and operating efficiency.
- **Establish Partnerships & Secure Public Funding:** BELL's team has



considerable experience in establishing partnerships and a growing network of schools and districts interested in launching new programs. BELL will create new partnerships with public schools and school districts in existing regions (GA, MD, MA, MI, NY) and leverage regional resources to launch programs in adjacent districts. BELL will also launch programs three new regions (including, for example, California, North Carolina, and South Carolina), for a total of eight regions served by 2014. Partners help identify high-need students for enrollment in BELL programs; help recruit high-performing teachers; provide access to classrooms and other school facilities; provide nutritious meals; and help BELL access public funding to cover incremental program costs.

- **Hire & Train Staff:** BELL utilizes web-based recruitment and training systems to rapidly and efficiently prepare a corps of educators to deliver its program models. Local partners in each of BELL's regions expand the organization's capacity to deliver in-person pre- and in-service training.
- **Deliver Program Models:** In Phase I of its strategic plan, BELL developed strong teams and systems that can replicate and deliver high-quality programs at scale. Its team, including experienced program managers and departments focused on staff recruitment, training, evaluation, enrollment, and programming, are designed to deliver programming in as many as ten regions.
- **Produce Strong Evidence of Impact:** With each new partnership and resulting evidence of impact, BELL adds to its credibility and generates additional interest from principals and superintendents. A rigorous independent evaluation will lend even stronger proof of impact, further set BELL apart as a leader in extended learning, and create new opportunities for BELL to access public funds.

Target Customers

As noted above, BELL program primarily serve children in grades K-8 who live in low-income communities and attend low-performing schools. Participating students come from diverse ethnic backgrounds, and ~20% are limited English proficient. Thousands of BELL students speak Spanish, Vietnamese, Haitian Creole, or Arabic as their first language.

As noted earlier, BELL targets schools considered to be "low-performing" due to chronic trends in state test scores. BELL selects its school and district partners based primarily on their alignment with current operations and BELL's alignment with school and district priorities in terms of grades served, student demographics, and special needs. School and district partners demonstrate a high level of need and a strong commitment to partnering with BELL, applying public funding to support program costs, and providing in-kind resources such as classroom space, nutritious meals, and transportation.

Growth Readiness & Competitive Advantage

BELL is uniquely positioned to grow its impact and influence the trajectory of education reform in America.

- **Evidence Base:** Proof of impact is important for principals, district leaders, and policy makers to make informed decisions about how to use limited resources while

maximizing their impact on student achievement. BELL is one of only three summer learning programs in the country – and the only one operating in multiple states - with scientific evidence of impact on students’ academic skills.⁵

- Replication & Scale:** BELL programs are in demand by schools and school districts. In BELL’s first phase of its strategic plan (2007 – 2010), it developed mature operating systems designed to enroll thousands of students; screen, hire, and train thousands of educators; process student assessments and target instruction to students’ individual needs; support performance management of educators and staff; and monitor program quality and outcomes. It built a powerful information technology platform that integrates a wide variety of applications and hardware to increase efficiency and impact. As a result, the organization has already successfully replicated its programs in school districts across six states. Its program models have increased student achievement across grades K-8, and proven effective for various subgroups of students, including low-performing students, students from low-income families, and English language learners.
- Public-Private Partnership Model:** Central to BELL’s growth and sustainability strategy is its public-private partnership model through which it combines public funding through Title I and private contributions to deliver its robust program models at scale. Schools and school districts have demonstrated an ability to support the majority of program costs through existing public funding streams. This model enables public and private resources to reach more students and produce a greater impact. BELL has executed groundbreaking partnerships with seven major urban school districts: Augusta (GA), Baltimore, Boston, Charlotte, Detroit, Flint, and Springfield (MA), as well as a consortium of public charter schools in Michigan. It has reached thousands of scholars through such partnerships, and gained the attention of principals, superintendents, and policy makers throughout the country that share its belief that summer and after school programs can and should be integral elements of education reform in America. Examples of recent partnerships follow:

Detroit Public Schools		Public Charter School Consortium		Richmond County Public Schools	
Scholars Served:	4,093	Scholars Served:	1,080	Scholars Served:	753
Schools:	15	Schools:	7	Schools:	4
Teachers & Mentors:	670	Teachers & Mentors:	180	Teacher s & Mentors:	110
Grade Levels:	K-8	Grade Levels:	K-8	Grade Levels:	1, 2, 4, 6, 7
Average Attendance:	74%	Average Attendance:	82%	Average Attendance:	80%
Months’ Skills Gained:	5	Months’ Skills Gained:	6	Months’ Skills Gained:	3
Parental Satisfaction:	92%	Parental Satisfaction:	93%	Parental Satisfaction:	97%
District Investment: (per scholar)	\$1,100	School Investment: (per scholar)	\$1,110	District Investment: (per scholar)	\$910

⁵ Child Trends: What Works for Summer Learning Programs for Low-Income Children and Youth: Preliminary Lessons from Experimental Evaluations of Social Interventions. 2009.

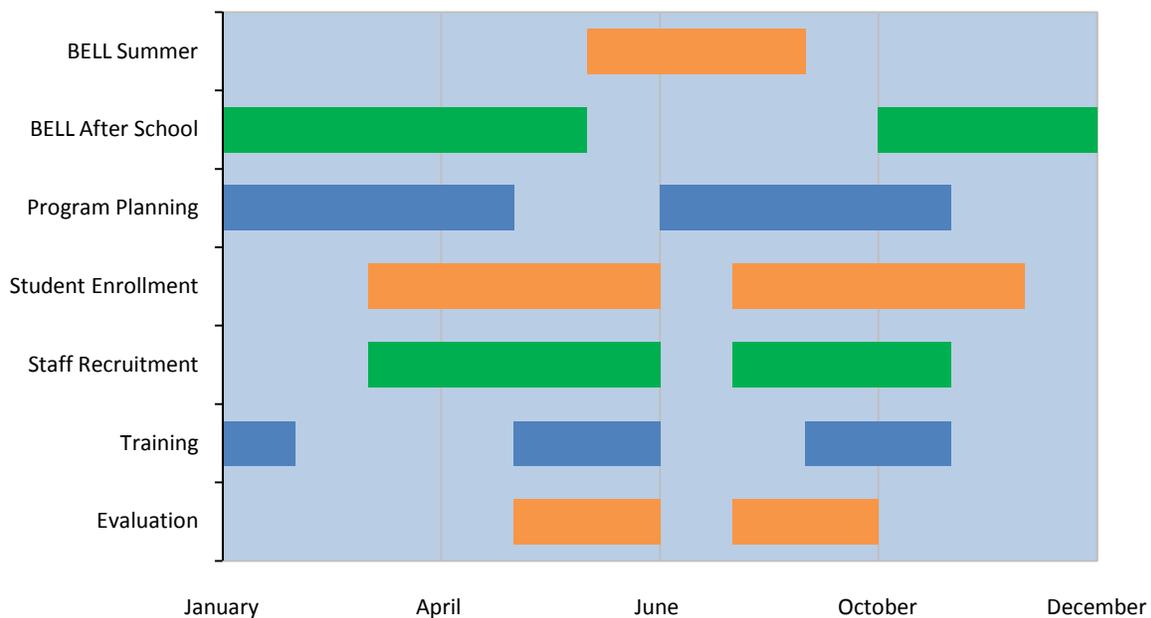
Timetable

12-Month Operating Plan

BELL's goals for FY11 (July 1, 2010 – June 30, 2011) are to:

- Serve at least 10,200 scholars.
- Deliver high-quality programming and achieve strong outcomes.
- Continue to diversify public revenue by increasing new business development activities, communication, government relations, and local partnership-building.
- Align business processes to support compliance with key public funding streams.
- Achieve revenue and bottom line goals through effective fundraising, public revenue diversification and maximization, and expense management.
- Cultivate and develop talent to support organizational growth with quality.

The following chart illustrates the annual program operating timeline. Activities related to fundraising, communication, government relations, and talent development occur throughout the year.



Marketing Plan

BELL pursues a marketing plan that is segmented to various target audiences:

- **Parents:** A grassroots marketing campaign led by site-based “Parent Ambassadors” reaches parents through in-person consultations, orientations, print advertising, phone calls, mailings, and communication through school and community partners. Parents enroll their children in BELL and engage in program activities.

- **Teachers & Young Adults:** Regional recruitment staff members reach teachers, college students, and paraprofessional through in-person presentations, print and web-based advertising, participation in job fairs, and communication through school and community partners. Teachers, students, and paraprofessionals work in BELL programs.
- **Schools:** BELL’s centralized sales and business development team and regional program leaders market BELL programs to schools through published outcomes reports and other print materials, in-person meetings, and referrals from other principals and district leaders. Schools agree to partner with BELL, connect the organization with students, parents, and faculty, and direct public funds to support program costs.
- **Policy & Thought Leaders:** BELL regularly engages policy and thought leaders at educational conferences and other events throughout the country. The organization also partners with others such as the National Summer Learning Association and The Afterschool Alliance to share data, shape policy recommendations, and generate new opportunities to expand its impact.
- **Donors:** BELL’s centralized development team cultivates hundreds of foundations, corporations, and individuals each year in its pursuit of operating and growth capital. The team publishes a wide variety of outcomes reports and newsletters, host events, and conducts mailings to increase the organization’s visibility and celebrate its outcomes.
- **Elected Officials:** As part of Phase I of its strategic plan, BELL launched a government relations strategy to market its programs and impact to elected officials who can unlock public funding to expand and sustain BELL programs.
- **Community:** BELL pursues general marketing of its programs and impact through its website, public relations (supported by a professional firm), events, publications, social media, and other activities.

As part of its strategic plan, BELL is investing in its communication capacity. In Phase I (2007 – 2010), BELL completed a branding initiative, refined its messaging, and launched a new website. In Phase II (2011 – 2014), BELL seeks to articulate a more aggressive marketing strategy that more thoughtfully aligns messaging across its target audiences and expands marketing efforts to increase its visibility and public awareness to issues such as summer learning.

Social Return on Investment

Students Reached

- BELL will grow to deliver high-quality educational programming to 50,000 students from 2011 – 2014.

Student Outcomes

- Scholars will increase their literacy and math skills as a result of their engagement in BELL programs.

Performance Indicators (Cumulative)

Scholars Served:	50,000
Schools Served:	300
Grade Levels:	K-8
Teachers & Tutors Trained:	6,000

- ✓ Scholars in BELL Summer will gain at least three months' grade-equivalent literacy and math skills in BELL Summer.
- ✓ At least 65% of scholars in BELL After School will outpace national norms in acquiring new academic skills.
- Scholars will increase their self-concept and improve their attitude toward school and learning.
- Scholars will attend school regularly, advance to the next grade, and graduate on time.

Parent Outcomes

- Parents will become more engaged in their children's education by communicating more with their child's school-year teacher, reading more frequently with their children, and attending more school-related events.

School Outcomes

- The BELL Summer and BELL After School programs will supplement school-year instruction with at least 20% more learning time.
- More than 6,000 educators will hone their skills through BELL's training program, including more than 3,000 college students who will gain real-world experience engaging high-need students.

Impact on the Education Sector

- Evidence of impact from BELL programs will inform public policy and lead to increased funding for high-quality summer and after school learning programs.
- Knowledge dissemination efforts will increase the quality of summer and after school programs throughout the country.
- Proof of impact will serve as a model for school reform.

BELL is working to ensure all children have access to the educational opportunities they need to fulfill their potential. When all children are able to gain core academic skills, hold high personal, academic, and professional aspirations, succeed in school, and pursue higher education, all stand to benefit. According to one recent estimate, every student who is at risk of not graduating from high school who BELL helps to succeed in school saves society \$260,000 in lost earnings, taxes, and productivity.

E. Evaluation & Knowledge Dissemination Plans

Evaluation Plan

BELL will measure program impact, quality, and progress against its strategic plan.

- **Program Impact:** One key output of BELL's strategic plan is additional rigorous evidence of impact. As part of its 2011-2014 strategic plan, BELL seeks to partner with MDRC and complete an evaluation that extends the work of its previous Urban Institute study. That study looked at BELL Summer's impact on reading achievement and parental involvement. The next-generation study will look at both reading and math achievement, and extend the scope of inquiry to consider BELL's impact on student

engagement and achievement during the school year by measuring attendance, grades, test scores, and promotion rates. The study will follow a randomized control trial or a regression discontinuity design, depending on the nature of the student selection process in participating districts.⁶

The study may also use a comparative interrupted time series design to measure BELL's impact on *school-level achievement*. The average test scores of BELL schools in the spring of the evaluated school-year will be compared to the test scores that these schools would have earned given their historical trends before BELL started operating. Trends in BELL schools will be compared against the corresponding trends for a set of comparison schools in the same district.

Evaluators will complete an implementation study to understand the magnitude of program impacts, generate lessons for replication, and provide formative feedback about the program model and implementation strategy. The study will consider the broader context in which programs operate; characteristics of program operations; program dosage; and the extent which participants experience positive outcomes compares to other students and schools.

In addition to this rigorous study, BELL will conduct internal evaluations of program impact. The organization administers the Stanford Diagnostic Reading Test (SDRT) and Math Test (SDMT) on a pre- and post-program basis to measure academic achievement, as well as skills-based quizzes to regularly monitor progress and tailor instruction. BELL administers the Youth Outcome Toolkit at the end of each program to measure self-efficacy and social skills, and employs scholar, teacher, parent, and principal surveys to generate data on student achievement, attitudes, and parent engagement.

- **Program Quality:** BELL measures several indicators of program quality, such as scholar enrollment, attendance, and staff to scholar ratio. It uses a customized, web-based "Scholar Management System" to track the number of youth served. Staff members enter data from enrollment forms such as student date of birth, grade, school and home address, eligibility for free- or reduced-price lunch, and other risk factors. Supporting this system is a suite of information systems that efficiently collect and process program performance data, such as student enrollment, attendance, and retention. For example, scanning devices register attendance and a web-based assessment system tracks and reports on student progress.
- **Strategic Plan:** BELL's board and executive leadership team used a balanced scorecard approach to set performance goals and monitor performance. Leadership will establish annual performance benchmarks for each of the primary plan goals (Impact & Evidence, Capacity, and Sustainable Growth), and regularly monitor performance against those goals.

⁶ Several school districts select specific students who are then mandated to participate in BELL Summer as a criteria for promotion to the next grade. In such circumstances, a randomized control trial design is not feasible.

Communication Plan

BELL communicates through several media to reach its many audiences mentioned above. Given its growth ambitions, the organization must also grow its capacity to communicate. To this end, investments in BELL's strategic plan will be used to build a strong internal communication function and smartly apply information technology to reach parents and teachers, share data, and disseminate knowledge.

- **Parents:** BELL communicates student enrollment, engagement, and performance data to parents through regular parent-teacher meetings, printed progress reports, and telephone outreach. BELL often leverages the voice- and web-based communication channels of school partners, and also works with community-based organizations to share information with parents. Increasing enrollment in existing regions and launching new regions will require increased outreach to current BELL parents to ensure they continue returning to BELL, as well as to new parents in new schools and communities.
- **Teachers:** BELL reaches teachers through grassroots outreach in schools, web-based communication, and networking with community-based partners. The organization shares performance data and employment opportunities.
- **School, District, and Community Leaders:** BELL publishes and shares outcomes data with a broad network of principals, superintendents, community-based organizations, and elected officials. Data on program impact and growth are shared broadly with various media outlets and educational networks to increase awareness, inform policy decisions, and cultivate new partners. BELL also presents at a wide range of conferences and events to share information with thought and policy leaders.
- **Funders:** In addition to its general communication about performance and impact, BELL is sharing its strategic plan with current and prospective growth capital investors and partners. The plan presents milestones that serve as common terms and conditions for donors and include annual metrics for evaluating performance. BELL's board and executive leadership team is continually monitoring progress against these metrics, reporting to investors quarterly, and participating in annual performance reviews with its lead partners.

Organization Background

BELL was founded in Boston in 1992 by a group of students at Harvard Law School. These students worked with Professor Charles Ogletree, Jr., a leading civil rights leader and scholar, and Dr. Robert Peterkin of the Harvard Graduate School of Education, to create an afterschool model that was targeted at the needs of low-income families and at-risk students. In 1996, to counter summer learning loss, the organization created the BELL Summer program. Inspired by their impact, BELL's leaders expanded its programs in New York City in 1996 and Baltimore in 2004. In 2007, the organization launched Phase I of its strategic growth plan. In 2009 and 2010, BELL worked with consultants from the Bridgespan Group to articulate Phase II goals and launch this plan.

BELL pursues its mission by launching school-based programs that are supported by centralized teams and systems in regional and national offices. Its regional teams are responsible for scholar enrollment, staff recruitment, and program implementation and management, while its national teams are responsible for evaluation, training, fundraising, compliance, finance, and human resources. Its Board of Directors sets the organization’s strategic priorities and its Executive Leadership Team oversees day-to-day activities. BELL currently serves 10,000 students at 70+ schools in five states.

F. Infrastructure Requirements

	Investment
1. Pursue Sustainable Growth	
Increase Enrollment: By partnering with public schools, public charter schools, and school districts, BELL will increase access to public funding and grow to reach 50,000 students over the next four years. BELL will launch its programs in at least three new regions. Growth capital will be used to cover short-term operating deficits as BELL expands enrollment, launches new program sites, and increases the fee-for-service and government revenue required to sustain scale long-term.	\$3.4M
New Business Development: BELL will establish a new business development team to form new partnerships with schools and school districts in current and new regions. Full-time staff in each region will work to ensure BELL achieves its enrollment and sustainability benchmarks while identifying additional partners that can increase operating efficiency, share ownership of programmatic success, and ensure the long-term viability of BELL’s activities.	\$2.8M
Increase Strategic Cash Reserve: BELL will increase its strategic cash reserve to serve as an alternative financing vehicle during growth and maintain the fiscal flexibility needed to adapt and thrive in a changing education environment. At the end of this strategic plan, BELL’s cash reserve will total approximately \$4.25M (~20% of BELL’s operating budget).	\$0.5M
2. Impact & Evidence	
Programming: BELL will continue to improve the quality of services delivered to children, families, and schools to maximize short- and long-term impact. Specifically, BELL will align instruction to emerging common core standards. It will test and roll out formalized enrichment curricula on topics such as science, technology, leadership, and health to increase scholars’ academic and social outcomes. It will roll out additional supports for alumni to help them succeed throughout high school and into college. And, BELL will continue to expand its award-winning eLearning platform to ensure it can efficiently train an expanding workforce of Site Managers, teachers, tutors, and other staff.	\$1.7M
Evidence Base: BELL will work with MDRC to complete an independent, rigorous evaluation of its summer learning program to complement current evidence and extend proof of impact to include math as well as literacy achievement. The next-generation study will also add a new element that looks at student in-school performance and engagement, and provide a critical missing link in the research literature that ties summer learning to in-school success. It will explore school-	\$3.0M

level outcomes and include an implementation study to understand which elements of the program design are most important for delivering strong student outcomes.

3. Strengthen Quality & Capacity

Invest in Talent: BELL will further invest in developing a strong team of leaders at all levels of the organization through new professional development programs, succession planning, expanded performance management systems, and strategic partnerships. **\$1.4M**

Refine Core Systems: BELL will further develop the information technology infrastructure that drives core program activities including scholar enrollment, staff recruitment, and parent communication. Enhancements will be designed to increase operating efficiency while enabling BELL to plan and execute its public-private partnerships quickly and successfully. Such capabilities are essential given that many schools and school districts form partnerships in the spring, resulting in a narrow window of time for preparing and launching BELL programs in the summer. **\$1.0M**

Increase Communication Activities: BELL will establish a communications function and leverage expertise in public relations and branding to increase brand awareness, reach more parents and schools, and advance its sustainability plan. This includes hiring full-time staff dedicated to communication activities, working with consultants to design and implement communication strategies, and partnering with intermediaries such as the National Summer Learning Association. **\$1.1M**

Total Growth Capital Required: \$15.0M

BELL Use of Growth Capital					TOTAL
	FY11	FY12	FY13	FY14	
Pursue Sustainable Growth					
Increase Enrollment	1,300,000	875,000	850,000	360,000	3,385,000
New Business Development	803,000	600,000	800,000	600,000	2,803,000
Increase Strategic Cash Reserve	500,000	-	-	-	500,000
Impact & Evidence					
Programming	409,000	430,000	430,000	430,000	1,699,000
Evidence Base	7,000	1,500,000	1,500,000	-	3,007,000
Strengthen Quality & Capacity					
Invest in Talent	180,144	420,000	420,000	420,000	1,440,144
Refine Core Systems	338,000	300,000	200,000	200,000	1,038,000
Increase Communication Activities	340,000	250,000	250,000	250,000	1,090,000
Total	3,877,144	4,375,000	4,450,000	2,260,000	14,962,144

G. Financial Plan

Capital Required & Use of Funds

BELL requires \$15M in growth capital to pursue its strategic plan from 2011 – 2014. Growth capital will enable the organization to generate an additional \$70.2M in operating philanthropy, public funding, and other revenue needed to attain growth, impact, and capacity goals.

BELL receives four primary types of support:

- **Public Revenue:** Public funding from Title I and other public programs covers incremental program expenses.
- **Operating Philanthropy:** Contributions of general operating support and direct program support from foundations, corporations, and individuals will continue to support part of BELL’s ongoing operating expenses. As noted above in BELL’s sustainability plan, operating philanthropy will generally serve as a supplement to government revenue and enable BELL to provide the strong, centralized program support functions that are required to maintain high quality at scale.
- **Growth Capital:** BELL intends to use growth capital to cover short-term operating losses until it attains scale and covers its costs through renewable and scalable public funds. Growth capital will also be invested in further strengthening program quality, increasing its evidence base, enhancing organizational capacity, and increasing BELL’s strategic cash reserve.
- **Other Revenue:** In-kind contributions from partners such as Houghton Mifflin, which provides discounted curricula and assessment tools, Wilmer Hale, which provides pro-bono legal support, and other partners accounts for a small portion of BELL’s revenue.

Current Funders and Commitments

BELL has already generated \$5.2M in cash and commitments for against its \$15M growth capital campaign goal. These commitments include:

- \$3.5M in funding pledged by the Wallace Foundation, payable in FY11 and FY12.
- \$1.25M in funding received from the Edna McConnell Clark Foundation as the final installment of an earlier growth capital pledge that also helped support the previous phase of BELL’s strategic growth plan.
- \$0.4M in funding pledged by BELL’s board of directors and other individual donors.

Sources of Funding

FY11 – FY14

Public Funding	\$46.7M
Operating Philanthropy:	\$21.9M
Growth Capital	\$15M
Other Revenue	\$1.6M
<hr/>	
Total Support	\$85.2M

Public Funding Types

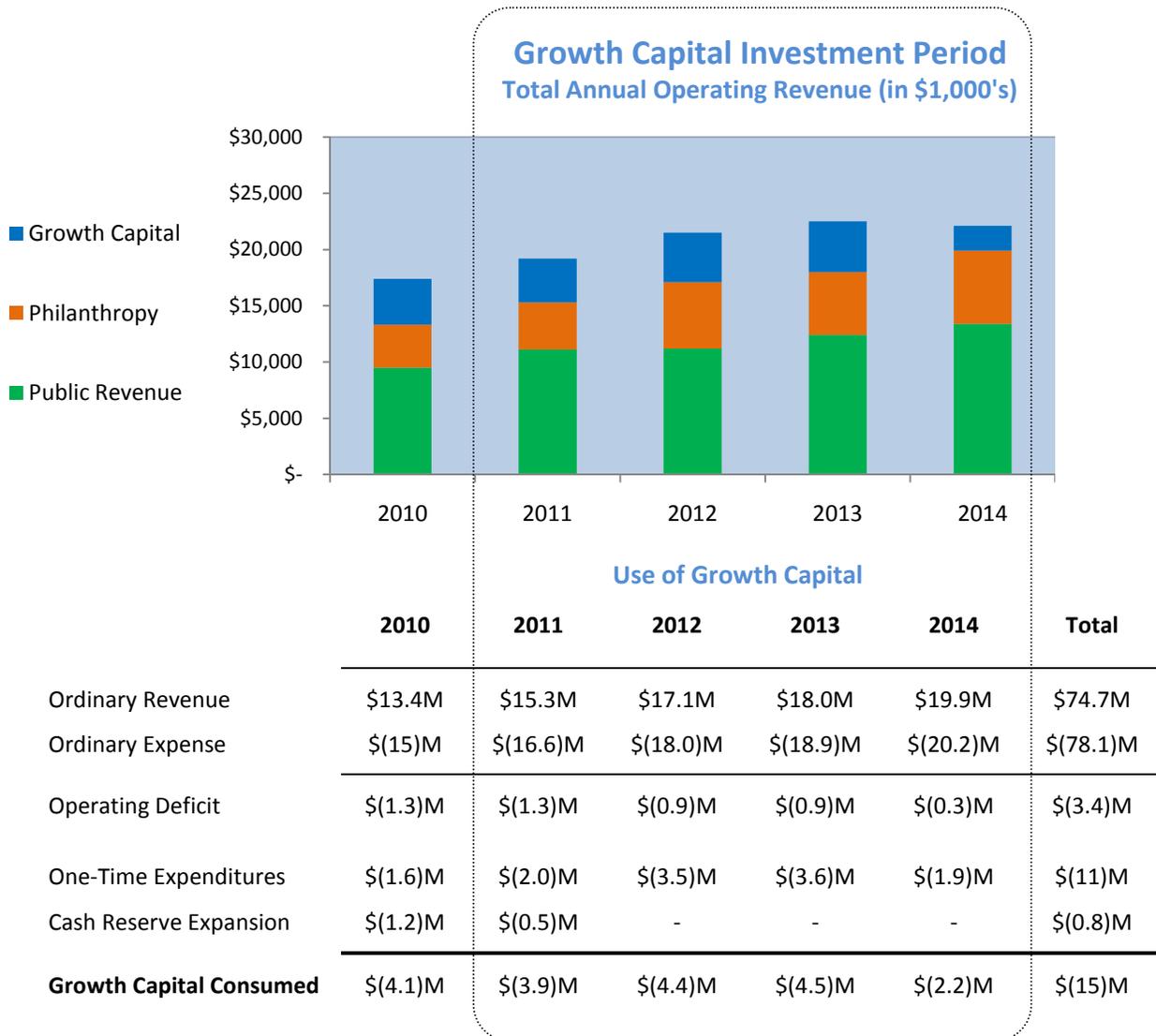
Primary, “anchor” sources of public funds include:

- **Title I Contracts:** Through fee-for-service contracts BELL accesses federal funding available to high-poverty schools.
- **SES Vouchers:** Through parent choice, BELL accesses federal tutoring vouchers.
- **Summer School Budgets:** An allocation of existing budget dollars allow schools to contract with BELL.

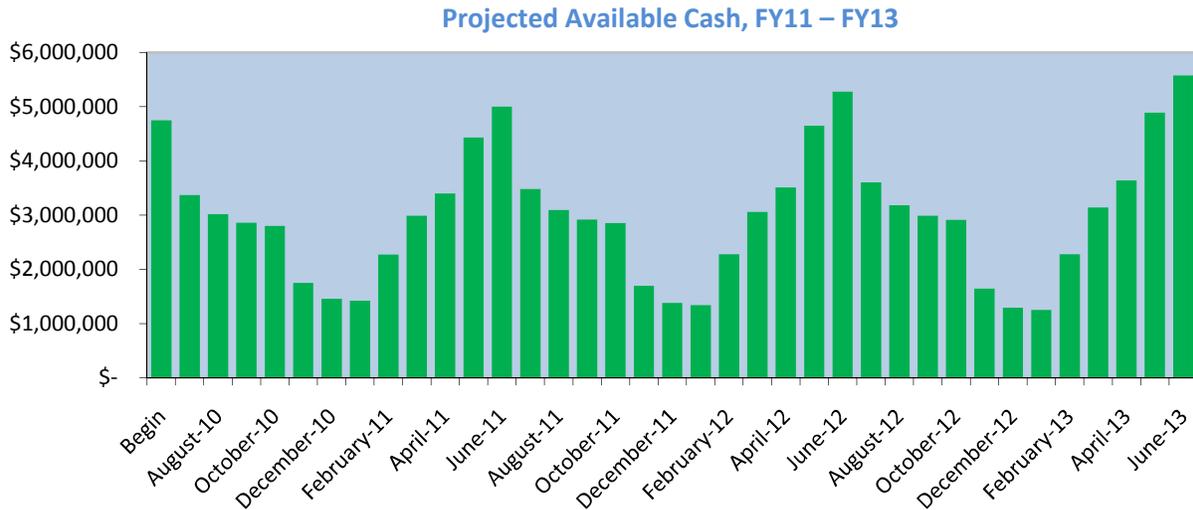
BELL kicked off its 2011 – 2014 campaign with additional commitments for general operations. In FY11, the organization has generated \$4.4M in cash and commitments from foundations, corporations, and individuals. Examples of donors providing operating support include the Helmsley Charitable Trust, which has pledged \$1.1M to support BELL Summer in New York City, the New York Life Foundation, which has pledged \$1M to support the national expansion of BELL Summer, and the Target Foundation, which has pledged \$0.6M to support BELL’s work with students in grades K-3. Another \$6.1M has been raised from public sources in support of BELL Summer. Public funding, such as fee-for-service contracts, is rarely pledged or paid out in advance of delivering program services. Contracts call for reimbursement based on enrollment, attendance, and other milestones, and are committed and realized on an ongoing basis.

Four-Year Financial Operating Plan

By 2014, BELL will attain scale such that it generates consistently renewable revenue to sustain regional and national operations. Approximately \$13.4M in operating revenue will be generated from public sources, including fee-for-service contracts with schools and school districts. Public support will be supplemented by \$6.5M in local and national philanthropy.



Cash Flow: BELL enters its next growth phase with \$3.75M in its strategic cash reserve and an additional \$1M cash balance. Over the next three years, the organization expects to draw down its cash reserve and cash balance to cover short-term operating losses until it is reimbursed by fee for service contracts, vouchers, and other sources. It will also borrow against a \$7M line of credit as appropriate. BELL will add to its cash reserve and/or balance each year and have more than \$5.5M in cash available by June, 2012.



Cost per unit of Service

The operating cost per scholar of BELL programs is approximately \$1,400 per scholar, which includes incremental costs (~\$1,000 per student); centralized program support costs (~\$200 per student); and indirect costs (~\$200 per student).

- Site-Based Fixed and Variable Program Costs:** Approximately 75% of the cost per student is comprised of the salaries of program managers, teachers, specialty instructors, and teachers’ assistants; training stipends; books, curricula, and supplies; assessment materials; field trips; etc.
- Centralized Program Support Costs:** Approximately 15% of the cost per student is comprised of fixed salaries of enrollment, recruitment, and assessment personnel; student enrollment, staff recruitment, and quality assurance activities; and information technology systems.
- Indirect Costs:** Approximately 13% of the cost per student is for fixed administrative expenses.

BELL’s school and district partners cover, as in-kind contributions, other fixed and variable costs, such as meals for students, utilities, security, facilities, and janitorial services.

By leveraging BELL’s infrastructure through scaling, BELL’s incremental cost per student is projected to decrease and level off at approximately \$850 per student – an amount that can easily be covered by existing public funding streams such as Title I, voucher programs, and other sources. Through summer learning partnerships, BELL has demonstrated an ability to

secure \$1,075–\$1,362 per student from LEAs to deliver summer learning programs. Data on average per-pupil expenditures during the school year, as well as research on the cost of summer learning programs, suggests the BELL Summer model is an efficient and effective use of funds, as BELL’s cost per student per hour is ~40% less than an average LEA school-year expenditures and less than national average costs for other private programs.

BELL is working to align public funding streams whenever possible to enable school and district dollars to go farther. For example, the organization is exploring opportunities to secure AmeriCorps grants, School Improvement Grants, and Title II teacher development funding. In a time when resources are stretched thin and few new investments are being made in public education, BELL’s ability to leverage multiple funding sources to support for program expenses suggests that scaling its program models is achievable even in the current economic recession. As its programs attain scale, centralized and indirect costs will be significantly reduced on a per-scholar basis as they are leveraged across more cities and schools, enabling growth capital and operating philanthropy to go further in reaching high-need students.

Sustainable Funding Model

BELL programs can be expanded and sustained primarily through renewable public funding streams. Its programs in Augusta, Detroit, and Springfield are almost entirely self-sustaining on fee-for-service contracts with schools and school districts, while part of the cost of its programs in Baltimore, Boston, and New York City is being sustained by similar revenue sources. BELL continually generates contributed funds from foundations, corporations, and individuals to supplement public revenue, pay for the entire cost of its programs in some schools and communities, and support the national infrastructure required to deliver local programming in its regions.

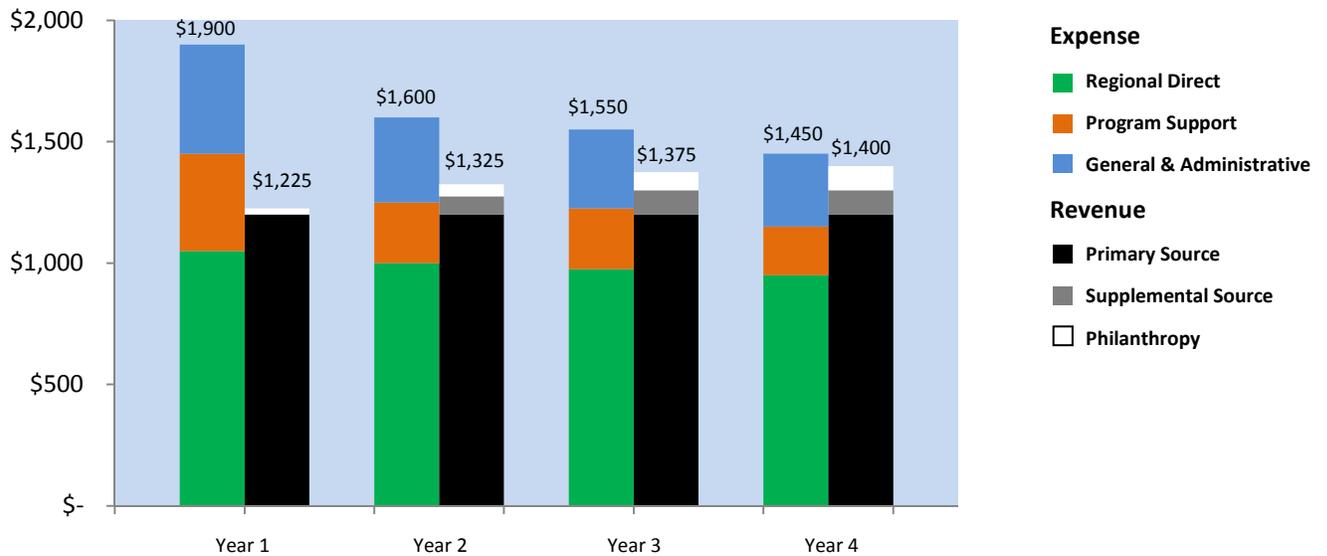
BELL has articulated a cost and revenue model that: (1) recognizes the full cost of the program per scholar served, including regional direct costs, program support costs and general & administrative costs; (2) requires regional (as opposed to national) revenue that is comprised of an anchor source of public funding as well as supplemental public funding and a sustainable amount of local philanthropy; (3) identifies a scale at which regional revenues cover the full program costs in that region; and (4) expects each market to reach the scale required to cover its costs over a four-year period or less. BELL calls this concept the “Model Market”

Model Market Example: The initial cost per scholar of a BELL program in a new market is typically about \$1900, including start-up costs (actual cost per scholar varies by market, primarily as a function of local wage rates and program dosage). In this initial year, BELL accesses an anchor funding source from the school or school district typically at a price point of about \$1,200 per scholar. Over time, BELL accesses local philanthropy from foundation, corporate, and individual sources. This private support is typically about \$300 per scholar. As the program scales over this time period, leverage from the regional infrastructure and BELL’s centralized headquarters drive costs down to \$1,500 or less over a four-year period. At that point, local revenues (\$1,500 per scholar, total) cover full costs to operate in that market. BELL has identified break-even scale in a market to be ~1,000 - 1,500 scholars per year. Until BELL reaches that scale, growth capital covers operating expenses and allows BELL to build and retain the capacity to grow and access local revenue. Four factors support sustainability.

- Growth:** BELL projects a “break-even” scale of ~1,000 – 1,500 students in a “Model Market,” although break-even may be attained at a lower scholar enrollment depending on cost drivers (such as program duration and local teacher pay rates) and public revenue. Regions attain break-even within four years of program launch. BELL is working to maximize enrollment in each region to exceed break-even thresholds and produce a small operating surplus that contributes to the cost of BELL’s centralized teams and systems and decreases reliance on private donors.
- Relationships:** Growth capital will be used to strengthen local relationships and increase access to local public funding. Investments in BELL’s capacity – particularly focused on communication - will further strengthen brand identity and customer loyalty.
- Evidence:** BELL’s current evidence base has led to the development of its public-private partnership model and fueled growth from 2007 – 2010. As noted earlier, it seeks to generate additional evidence regarding the effectiveness of its programs on student performance and school performance to drive education policy and funding.
- Efficiency:** Investments in capacity will enable BELL to further reduce its operating cost per student by applying information technology solutions to program activities such as student enrollment and staff recruitment and training. BELL will increase its strategic cash reserve to reduce finance charges and further drive down operating costs.

BELL’s Executive Leadership Team will use growth capital as detailed by this strategic growth plan and as approved by its Board of Directors. Capital inflows and outflows will be separately tracked, tied to audited financial statements, and reported biannually to all investors. Co-investor reporting and related activities will be coordinated by lead donors in partnership with supporting funders.

Model Market Expense / Revenue Per Scholar



Local Revenue: 64% of total cost 83% of total cost 89% of total cost 97% of total cost

Service Slots: 500 1,000 1,250 1,500

H. Risk Assessment & Contingency Plan

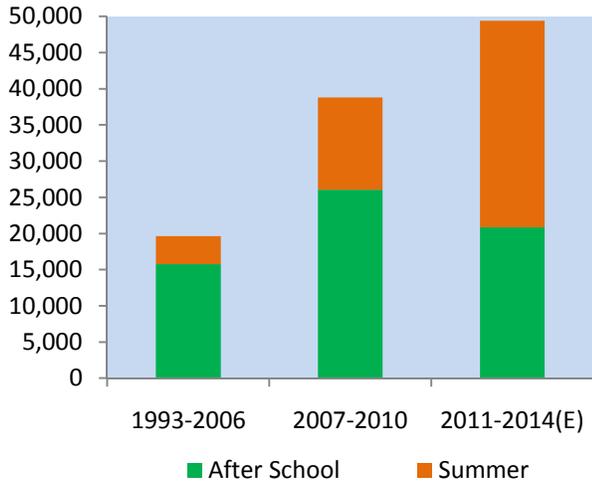
- **Public Revenue:** In 2011, the Elementary and Secondary Education Act will be reauthorized and changes will be made to some of the federal programs that serve as a primary or supplemental revenue stream in several of BELL's regions. For example, BELL anticipates some changes to the Supplemental Educational Services provision that may limit expansion opportunities for BELL After School, which led BELL to conservatively forecast program growth. In the future, it is anticipated that most public funds for summer and afterschool learning will flow through high-need schools and districts. BELL is sharing data and lessons learned and strengthening relationships with schools and districts to ensure it continues to secure public revenue from programs such as Title I.
- **District Leadership Transition:** District leadership – superintendents, assistant superintendents, Title I directors – often experience high turnover rates, threatening the long-term sustainability of BELL's local programs. At times, changes in leadership result in changes to the district's philosophy regarding how, and to whom, contracts are awarded. For this reason, BELL conservatively forecasts its summer growth projections while building in flexibility to pursue increased enrollment goals whenever possible. BELL continues to learn from other successful service providers about how they structure their district relationships, and how to secure multi-year contracts to minimize risk.
- **Philanthropic Revenue:** The national recession has left its mark on philanthropic giving, which declined in 2008 and 2009. Few organizations are immune to such a downturn, and BELL's ability to succeed in this fundraising environment is critical to the success of its strategic plan. BELL is launching an individual giving strategy to increase its success in that area; developing new corporate partnerships and volunteer programs to access new sponsorships; and its board members are increasing their engagement in fundraising. Efforts are ongoing to secure large, multi-year pledges in 2010 and 2011 to reduce the risk that such pledges may become more challenging to secure in the future.
- **Talent:** BELL is only as strong as the people who make its programs possible. High staff turnover and long vacancy rates are chronic issues in the nonprofit sector, and BELL is prioritizing talent cultivation and management to ensure it maintains its pace of progress and quality of programs and impact. New initiatives focus on increasing professional development for staff, succession planning for key leaders, and strengthening organizational culture.
- **Exit Strategy:** BELL has articulated the conditions required for it to partner with schools and districts – access to students, teachers, and facilities, a commitment of public funding, etc. If conditions change, it may become economically and/or operationally unfeasible to continue delivering programming. BELL's management staff will monitor compliance with partnership conditions and, if necessary, recommend exiting a school or region as appropriate. When exiting a school, BELL will whenever possible consider program staff for positions in nearby program sites. When exiting a region, BELL will consider program leaders for positions in other regions. When possible, BELL will work with school and districts to extend partnerships through the provision of technical assistance to ensure children and parents continue accessing high-quality programming.

Appendix

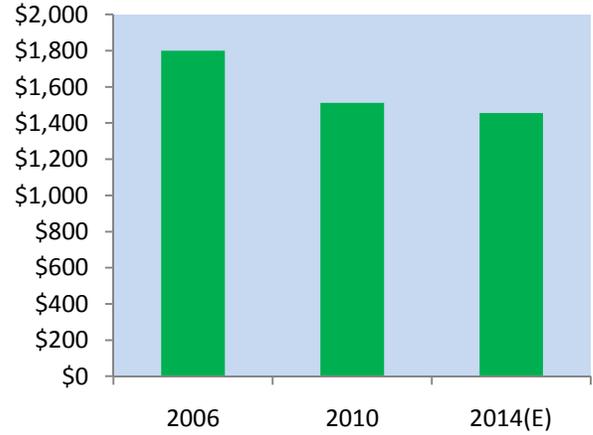
- A. BELL Metrics**
- B. Executive Leadership Team**
- C. Board of Directors & Governance Structure**
- D. Organization Chart for Initiative**

I. BELL Metrics

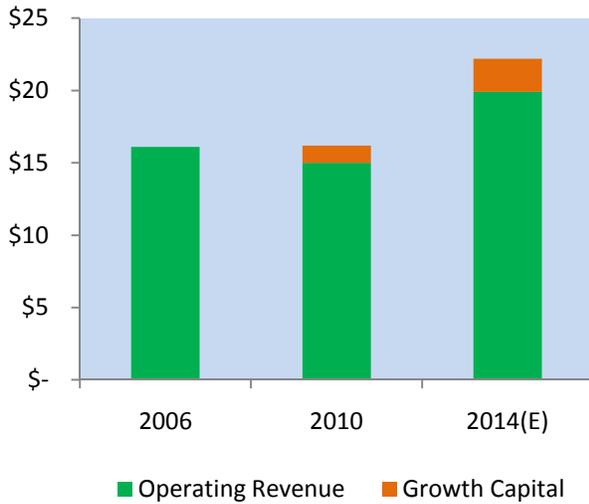
Total Scholars Reached



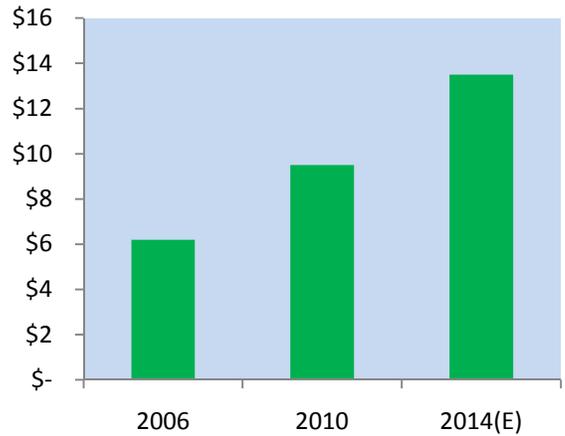
Average Cost Per Scholar



Annual Operating Revenue (\$M)



Total Net Assets (\$M)



II. Executive Leadership Team

BELL's Executive Leadership Team manages the day to day operations of BELL's national operations. This team successfully led BELL through its first phase of its strategic growth plan (2007 – 2010), and worked with its national governing board of directors to chart the organization's next growth phase from 2011 – 2014. During its first growth plan, this team navigated the organization through a recession and a major leadership transition.

Dr. Tiffany Gueye

Chief Executive Officer

Tiffany joined BELL in 1998 and is regarded as an authority on out-of-school-time learning, measurement, and evaluation. Through her leadership, BELL's programs, outcomes and evaluation methods have been nationally recognized as examples of best practices. Tiffany oversees BELL's Executive Leadership Team and the organization's education and evaluation functions. She has been honored for her work by the Massachusetts Conference for Women and received Boston College's Donald J. White Teaching Excellence Award. She holds a B.A. degree in Psychology and a Ph.D. in Educational Research, Evaluation and Measurement, both from Boston College. Dr. Gueye also sits on BELL's board of directors and its governance and development committees.

Antonio Battaglia

Chief Operating Officer

For the last three years, Tony has overseen information technology, human resources, communications, and finance activities at BELL. Tony comes to BELL with over 20 years of experience with large corporations such as Stone and Webster Engineering Corporation. He is former division president of Arch Wireless, which grew in revenue under his leadership from \$200M to \$450M. Tony has a B.S. in business administration from Boston College and an M.B.A. summa cum laude in Finance from Ohio University. Tony also sits on the finance and audit committee of BELL's board of directors.

Carole Prest

Chief Strategy Officer

In the last four years, Carole has formed partnerships and established BELL programs in Augusta, Baltimore, Charlotte, Detroit, Flint, and Springfield. Prior to joining BELL, she served as the executive director of the Commonweal Foundation, one of the top 10 private foundations in Washington, DC. There, she implemented a board-approved investment strategy focused on at-risk children, and established a capacity-building grant program. Prior to working with Commonweal, she served as president and chair of the Board of the Manor Care Foundation, and the senior vice president of strategy, marketing and product development at Manor Care, Inc. Carole has B.A. from Mount Holyoke College and an M.B.A. from Harvard Business School. Carole also sits on the strategy committee of BELL's board of directors.

M. Dean Bradley

Vice President of Field Operations

For the last two years, Dean has overseen program operations in BELL's six states and been responsible for scholar enrollment, staff training, and program management. Dean comes to BELL with 20 years of management experience at Kumon North America, Inc., a leading after school education provider with offices across the continent. Dean has a proven ability to produce franchise growth and profitability while ensuring high educational quality for a large-scale academic operation. Dean received his B.A. in Political Science and French at the University of Toronto. Dean also sits on the program committee of BELL's board of directors.

David Jones

Vice President of Human Resources

David joined BELL two years ago with over 20 years of experience spanning the non-profit and private sectors. In a 17-year career with Eli Lilly and Company, a global pharmaceutical manufacturer, David supported a variety of the businesses in HQ, regional, and international-based HR roles. Prior to Lilly, David spent four years in the non-profit sector working for Exceptional Parent Magazine, an organization focused on the needs of parents of children with disabilities. David earned his B.A. degree in Economics from Harvard University and holds an MBA from the University of North Carolina at Chapel Hill.

Ed Mulherin

Chief Financial Officer

Ed is a CPA, attorney, and founder and CEO of eCratchit Bookkeeping Inc., which provides professional outsourced bookkeeping, accounting, and consulting to businesses and non-profit organizations. Ed is a founding member of Leonard, Mulherin & Greene and is a shareholder in Innello & Associates, a law firm specializing in business law, estate planning, and real estate matters. Ed provides consulting to BELL and has helped manage BELL's finances and accounts as the organization has grown in revenue to over \$23M. Ed is a magna cum laude graduate from Boston College and is a cum laude graduate from Suffolk University Law School. In addition, Ed is a member of the Massachusetts Bar.

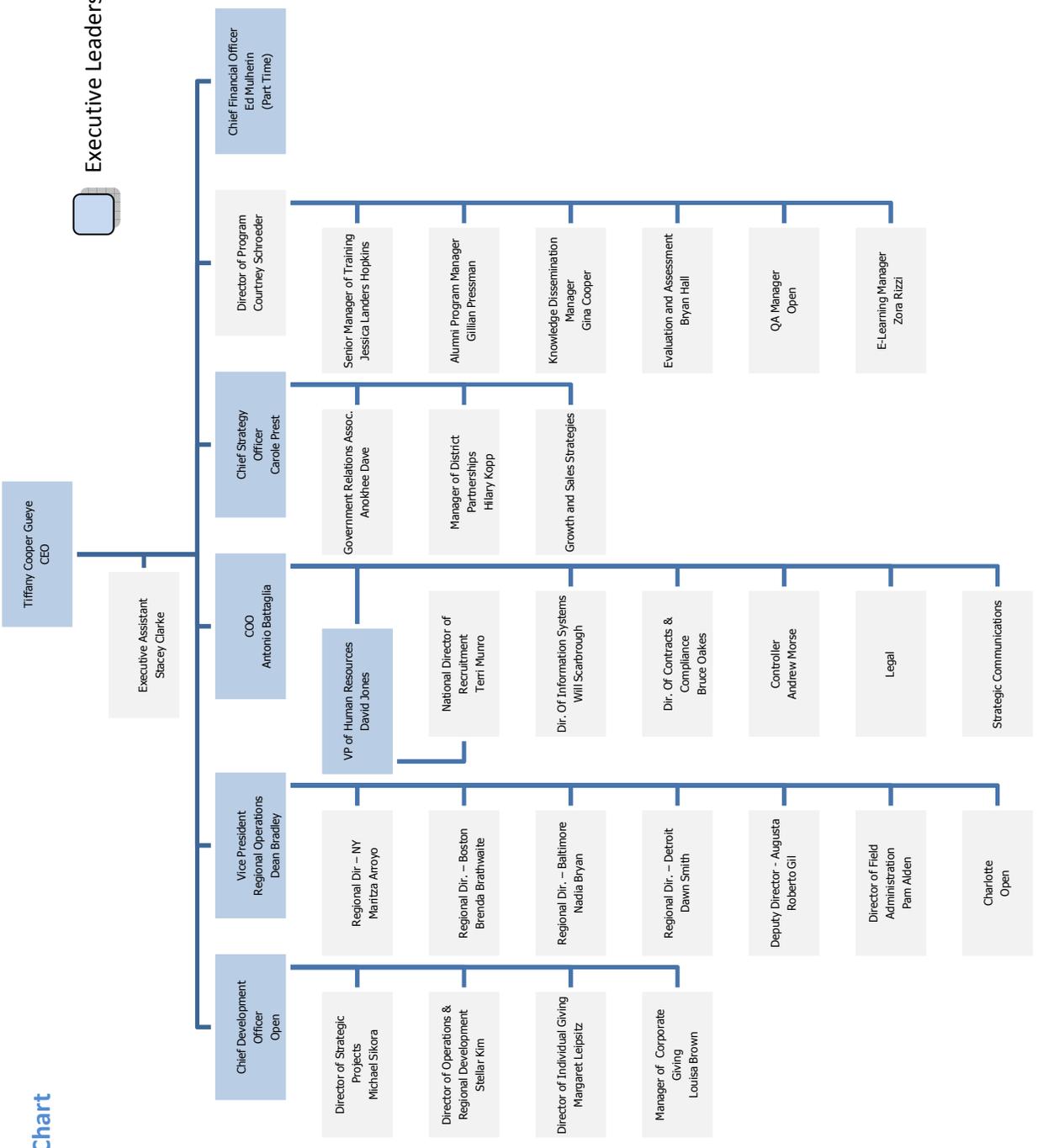
III. Board of Directors & Governance Structure

BELL’s national governing board of directors establishes the organization’s priorities and strategic goals, oversees the Executive Leadership Team, and provides leadership through six committees: governance, program, finance, strategy, audit, and development. The board meets nine times annually.

<p>G P D Laurene Sperling, <i>Chair</i> Trustee, Sperling Family Charitable Foundation</p> <p>S G John J-H Kim, <i>Vice Chair</i> Founder & Chair, District Management Council</p> <p>F D A Nicholas Bogard President, J. Nicholas Arthur</p> <p>G D Dr. Tiffany Cooper Gueye Chief Executive Officer, BELL</p> <p>F Gene Guill Managing Director, Deutsche Bank</p> <p>A D Kathleen Kelley Global Macro Portfolio Manager, Kingdon Capital Management</p> <p>D P Deb Knez Trustee, Richard & Susan Smith Family Foundation</p> <p>S Donald Manekin Senior Vice President, Seawall Development Corporation</p> <p>P Doug Miller Executive Vice President, State Street Corporation</p> <p>F S Soren Oberg Managing Director, Thomas H. Lee Partners</p> <p>Charles Ogletree, Jr., <i>Chair Emeritus</i> Professor, Harvard Law School</p> <p>G A F Chris Piela Regional Vice President, Liberty Mutual Group / Montgomery Insurance</p> <p>S Justin Sadrian Partner & Managing Director, Warburg Pincus</p> <p>P Dr. Lauren Smith Medical Director & Pediatric Hospitalist, Massachusetts Department of Public Health</p>	<p>Board Committees</p> <p>G Governance</p> <p>P Program</p> <p>F Finance</p> <p>S Strategy</p> <p>A Audit</p> <p>D Development</p>
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IV. Organizational Chart

Executive Leadership Team



V. Additional Attachments

FY10 Audited Financial Statements