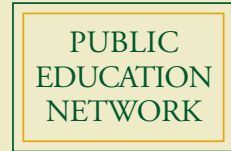



STRATEGIC PLAN 2010-2013



Public involvement. Public education. Public benefit.

A large, semi-transparent green image of many hands raised in the air, symbolizing participation and community.

Over 25 years of dedication
to quality public education
for all

“In the communities that it serves, PEN will increase the rate at which low-income students and minority students graduate from public schools ready for college and a career. PEN will help community stakeholders achieve and sustain a permanent commitment to fulfilling a community’s fundamental obligation to provide quality public education for all children.”

OUR MISSION

To build public demand and mobilize resources for quality public education for all children through a national constituency of local education funds and individuals.

Letter from the President

Since its inception in 1991, Public Education Network (PEN) has demonstrated powerful impact in hundreds of schools and school districts across the nation. Our local education funds (LEFs) are based in 32 states including Washington, D.C. and Puerto Rico, and reach 8 million students in the U.S., including 4 million eligible for free-and-reduced-price lunch. PEN has raised over \$4 billion in private support, and leveraged \$25 billion in public funding for education. LEFs have successfully developed leading edge practices starting small high schools, urban teacher residencies, college access, reopening school libraries, and teacher professional development programs. The work of individual LEFs is impressive and impactful, and it will continue.

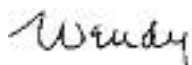
With this new strategic plan, Public Education Network utilizes the collective power of LEFs' expertise, effectiveness, and longevity in school reform to make a significant and dramatic impact for minority students and economically disadvantaged students. Specifically, our interconnected network of LEFs will work toward common goals to:

- + Increase the rate at which low-income students and minority students graduate from public schools ready for college and a career; and
- + Help community stakeholders achieve and sustain a permanent commitment to fulfilling a community's fundamental obligation to provide quality public education for all children.

Significantly increasing the number of students that graduate ready for college and careers is an ambitious goal that can only be met at scale by dramatic improvements in student outcomes. Schools and districts with large numbers of low-income students and students of color do not graduate a significant percentage of ninth graders and other graduates that are prepared for college or careers. To do so will require aligned change in school development practice, policies, and resources. It will require change within schools and school districts, and it will require change in local, state, and national policies. This is the critical challenge that Public Education Network's (PEN's) strategic plan is designed to meet.

With our 76 LEFs across the U.S., PEN has the breadth, reach, expertise, and commitment to scale up student graduation and postsecondary success outcomes in low-performing schools where change is most needed, and is difficult to create. The work of this strategic plan is an ambitious undertaking—one which we are committed to moving forward together. So in the communities where local education funds operate, PEN can make an even greater difference and impact. And, together, we will.

Sincerely,

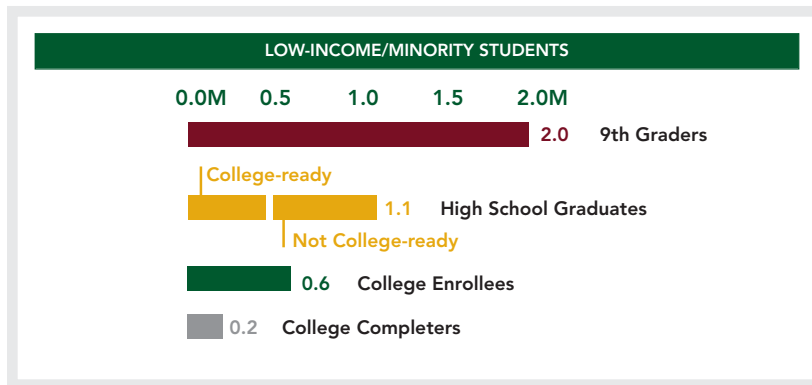


Wendy D. Puriefoy
President



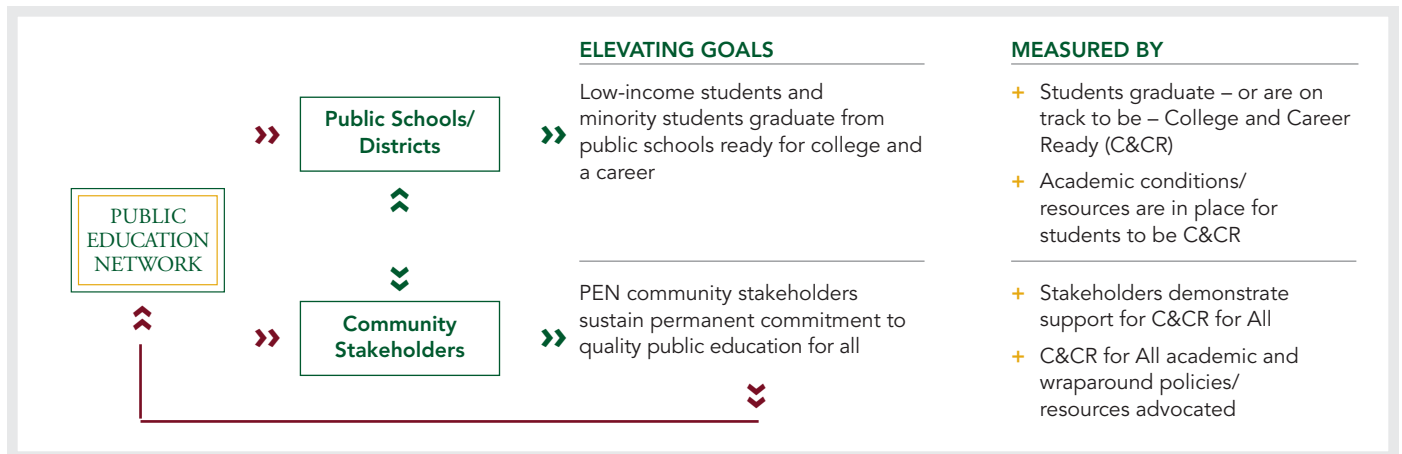
Richard J. Vierk
Chairman, Board of Directors

In 2009, only 10% of low-income or minority students will complete college



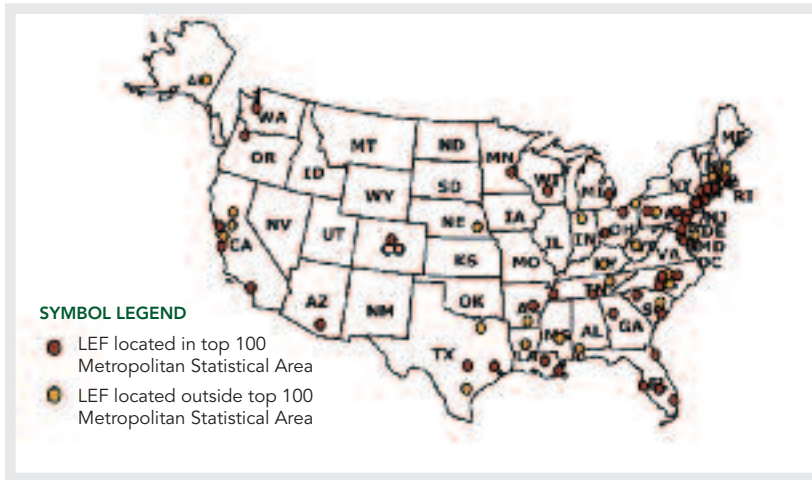
Low-income and minority students are also less likely to have the resources (e.g. experienced and effective teachers) needed to successfully graduate high school and complete college

PEN is committed to elevating goals for student achievement and community stakeholder action



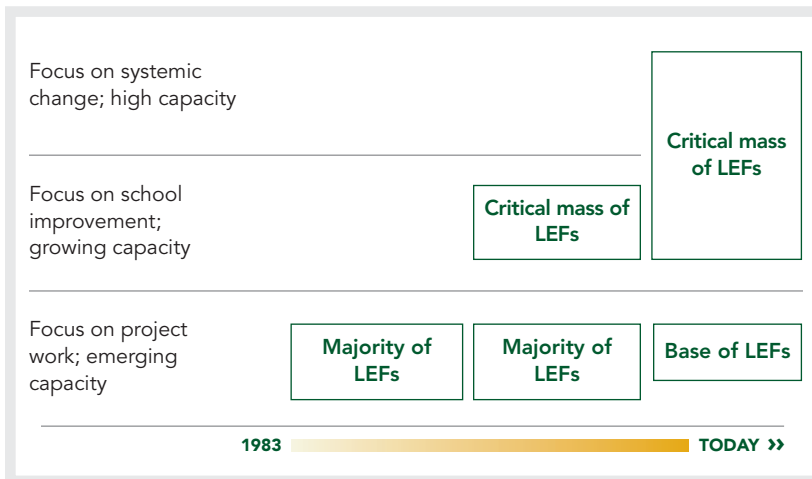
“In the communities that it serves, PEN will increase the rate at which low-income students and minority students graduate from public schools ready for college and a career. PEN will help community stakeholders achieve and sustain a permanent commitment to fulfilling a community’s fundamental obligation to provide quality public education for all children.”

PEN is distinctive as a community-based national network



- + PEN combines the impact of 76 Local Education Funds (LEFs)
- + LEFs are deeply engaged in and connected to local communities nationwide
- + These LEFs reach 8M students, including 4M students eligible for free-and-reduced-price lunch
- + LEFs serve more urban districts with a higher than national average percentage of students eligible for free-and-reduced-price lunch

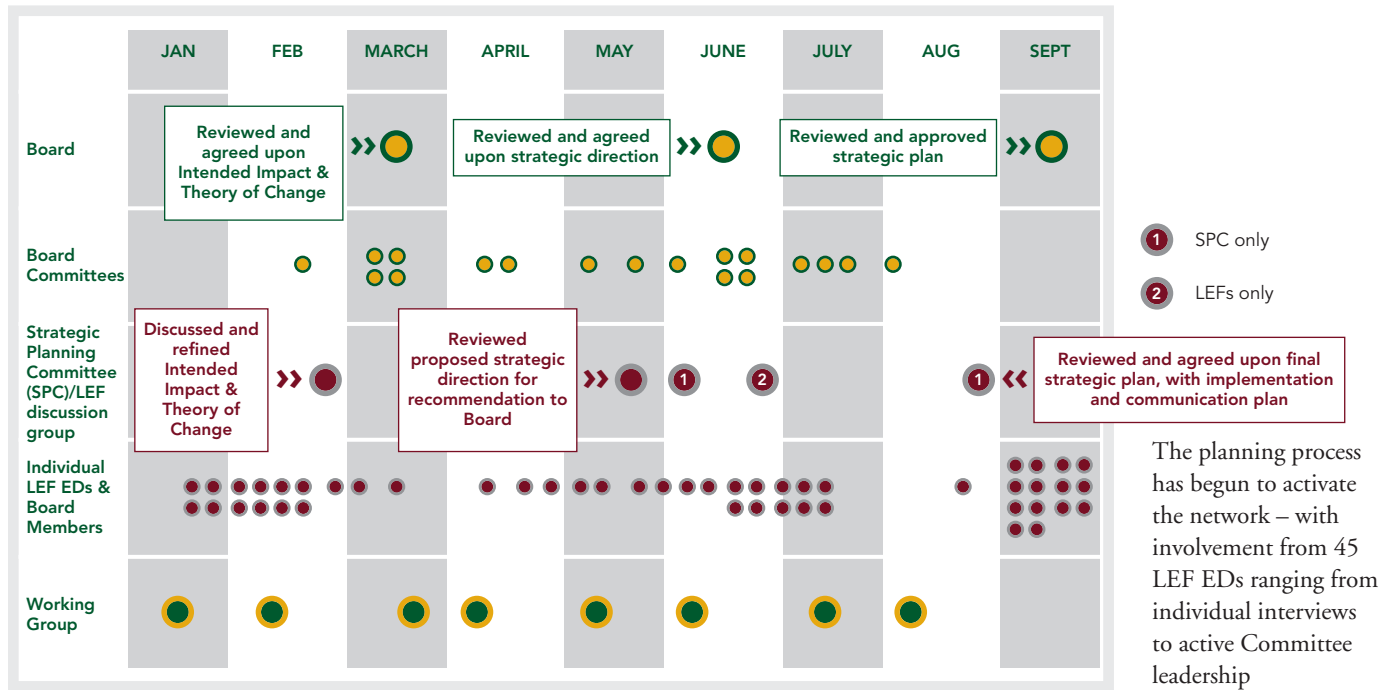
The network has come together to make a stepchange in its impact on student achievement



In 2009, under grants from the Atlantic Philanthropies and the Bill & Melinda Gates Foundation, PEN worked with The Bridgespan Group to develop a strategic plan to create a vibrant, interconnected network

- + This plan represents a profound shift as PEN moves from a network focused on improving the capacity of its members, to a network focused on its positive impact on the public education of disadvantaged children in the U.S.
- + 45 LEFs, greater than 50% of the network, have been involved in developing the strategic plan – through leadership on committees and participation in regional discussion groups and surveys

Strategic planning involved the entire PEN network



PEN collective leadership (LEF staff, national office staff, and boards) is responsible for the new plan

RESPONSIBILITIES WITHIN THE PEN COLLECTIVE VARY

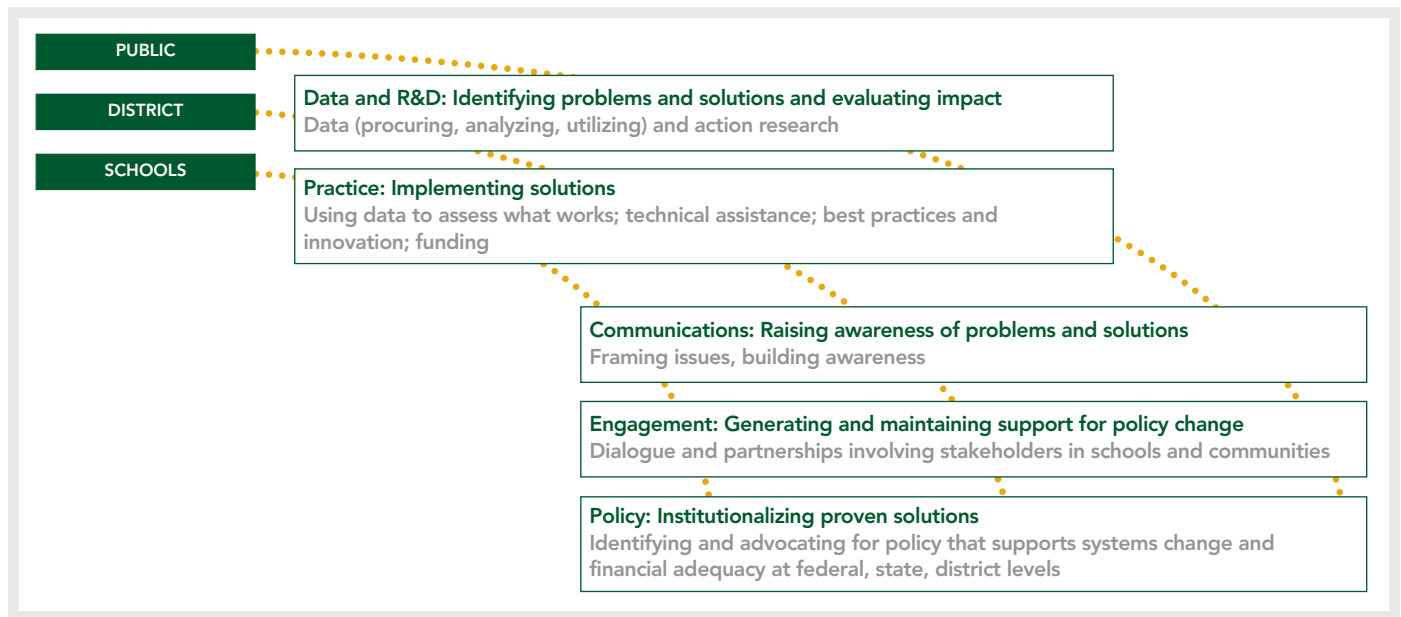
LEFs

- + In their daily work with communities and schools, 76 LEFs act as catalysts and provide support to a range of stakeholders in strengthening public education
- + Through their membership in PEN, the 76 LEFs and their 2,300 board members combine their presence within a community with participation in a unified national effort

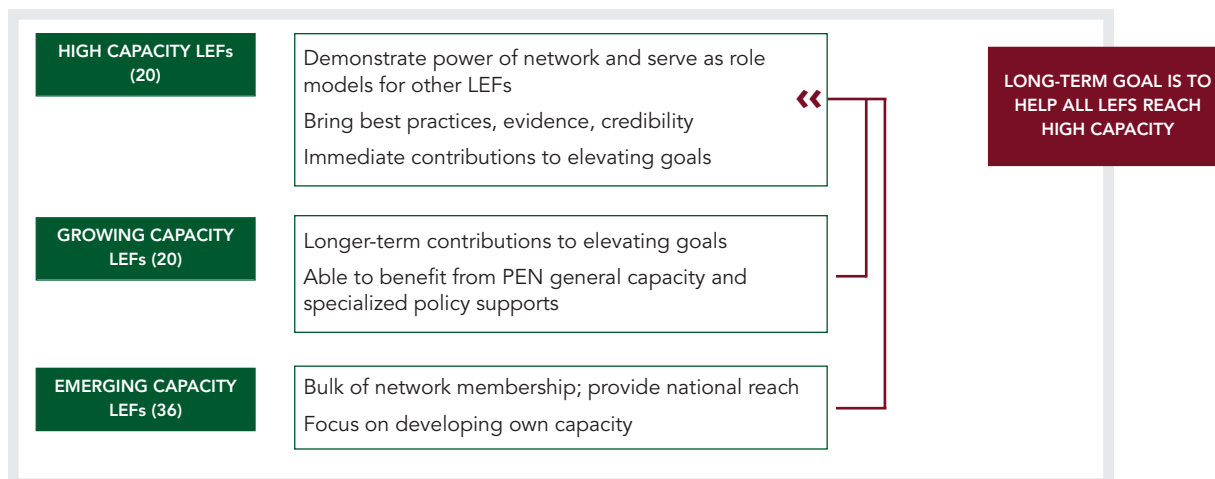
National Office

- + National Office represents the combined work of LEFs, interpreting roles and performance and acting as the broader voice of PEN
- + National Office provides core knowledge across all LEFs, and individualized support in return for greater impact

To raise student achievement, LEFs provide and leverage five high-value roles across different spaces



Currently half of LEFs have immediate capacity to implement PEN's collective strategy



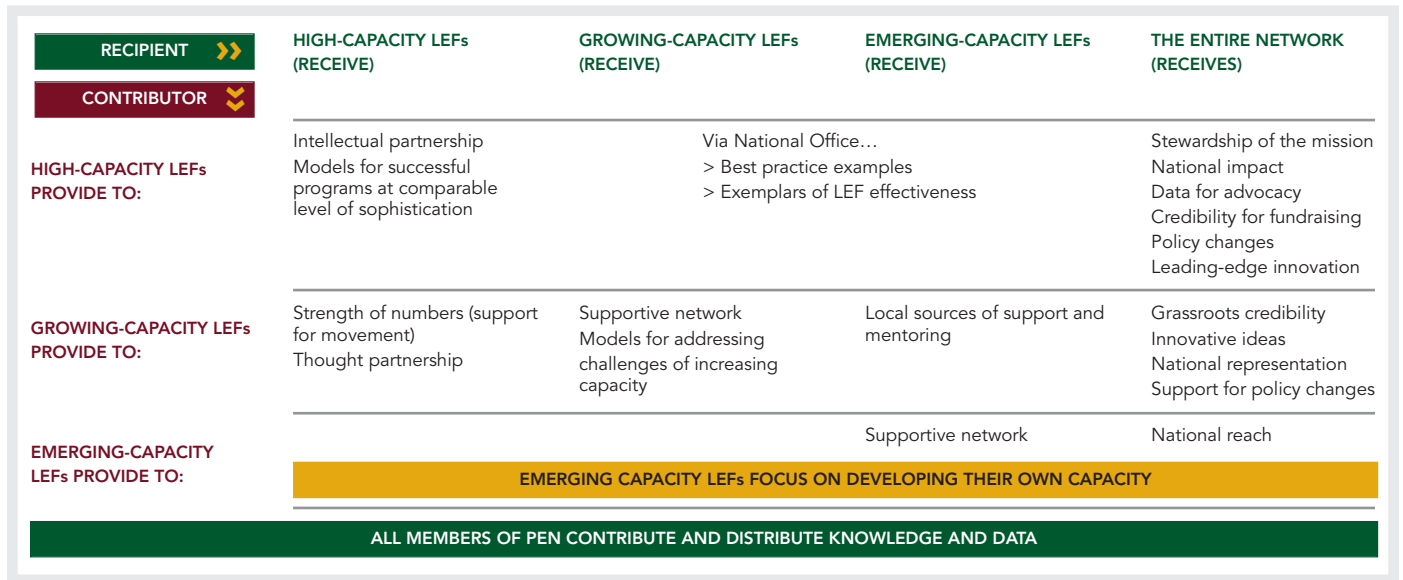
To fulfill these goals, LEFs execute five roles across a range of capabilities and issues

		CAPACITY		
		EMERGING	GROWING	HIGH
Data and R&D	Beginning outcomes tracking and performance benchmarking	Comprehensive outcomes tracking, frequent benchmarking and research, exploration of new approaches		
Practice	General support to schools, not positioned as model for systemic change	Systemic work based on research-validated methods or testing innovations, aimed at changing policies and practices		
Communications	Basic communications, PR, and/or marketing activities	Strategic understanding and use of communications media to educate and influence		
Engagement	Early-stage partnerships; community engagement to raise general awareness	Action-oriented engagement to achieve and sustain goals, with consistent use of high-impact partnerships		
Policy	Developing understanding of role and complexity of policy; any initial work on policy analysis usually at school level	Know policy context and how to use policy as a strategy; regularly provide input to policy makers and influencers, on district, state and national levels		
FOCUS ON RAISING STUDENT ACHIEVEMENT UNDERPINS ALL ROLES				

LEF organizational capacity is defined across four characteristics

		CAPACITY		
		EMERGING	GROWING	HIGH
Leadership	ED beginning to build visibility and relationships in community; LEF may work on many high value activities, but they are not connected by strong strategy	Leadership team has significant standing in community and direct acceptance and involvement with key district/government officials; finds the balance between allying with and pushing stakeholders; leads their LEF in crafting and implementing an effective, focused strategy		
Governance	Board focus is primarily internal; limited participation in governance activities and fundraising (give or get)	Influential Board representing key constituencies; highly focused on achievement; substantive, strategic participation in LEF fundraising (give or get) and governance, with an ability to make and help implement difficult decisions		
Funding	Limited internal capacity for fundraising; initial understanding of or ability to influence public funding	Deep internal capabilities in fundraising; thorough understanding of and significant influence over public funding		
Human resources	Generalized capabilities	Specialized capabilities and functions		

PEN works as an interconnected network



The National Office provides a blend of supports to help LEFs increase outcomes across the network



PEN's student data initiative will build the base for LEFs to identify areas for action

INITIATIVE CONTENT	WHY THIS IS URGENTLY NEEDED	WHY NOW IS THE TIME	WHY PEN IS UNIQUELY POSITIONED FOR SUCCESS
<p>Work with a subset of LEFs to improve district capacity for measuring graduation rates and on-track status of students</p> <p>Leverage PEN's knowledge and expertise in public engagement and partnerships to achieve stakeholder (e.g. superintendents and policymakers) support for and actual commitment of needed reforms and resources</p> <p>Begin building a network-wide database related to student performance to influence policy and practice at the local, state and federal levels</p> <p>Develop proven LEF data system best practice to serve as a model for building capacity of LEFs not currently able to participate in the initiative</p> <p>Provide technical assistance from National Office on communications, evaluation, other areas</p>	<p>Robust data systems are needed to measure whether students are College and Career Ready (C&CR) – and pinpoint areas for LEF support</p> <p>Data systems – even those being developed by leading-edge districts – do not have full capabilities needed to collect and report comparable, consistent data about individual student progress and teacher efficacy</p>	<p>Federal government and funder community have identified improving data systems as a core issue and are funding reforms in an unprecedented way</p> <p>There is emerging consensus about critical indicators of student achievement</p>	<p>As national network of local organizations, PEN can have unique nationwide influence on data practice</p> <p>Already existing set of LEFs with high capacity on data and evaluation</p> <p>LEFs' relationships with district leadership facilitates access to data</p>

PEN's public engagement initiative will increase LEFs' community-based results

INITIATIVE CONTENT	WHY THIS IS URGENTLY NEEDED	WHY NOW IS THE TIME:	WHY PEN IS UNIQUELY POSITIONED FOR SUCCESS
<p>Work with a subset of LEFs to improve capacity for measuring and acting on public engagement data</p> <p>Build a national, multi-year comparable set of data related to public engagement in and attitudes towards C&CR</p> <p>Ultimately, affect how the education field thinks about public engagement's role, including public use of information and analysis, in ensuring quality public education for all children and improving student achievement</p> <p>Provide guidance and support from National Office for building local partnerships, communications</p>	<p>Limited nationwide and local data on public commitment to education</p> <p>Improving C&CR requires public commitment, support from variety of stakeholders</p> <p>To meet outcome goals, LEFs need to increase public engagement measurement and capacity</p>	<p>Policy makers have taken initial steps – but public engagement is critical to ensure resources are actually committed and sustained</p> <p>Economic crisis is limiting local, state and federal dollars – public voice can ensure resources for C&CR are prioritized</p>	<p>PEN is unique in its focus on improving student outcomes through public engagement</p> <p>There is an already-existing set of LEFs with high public engagement capacity</p>

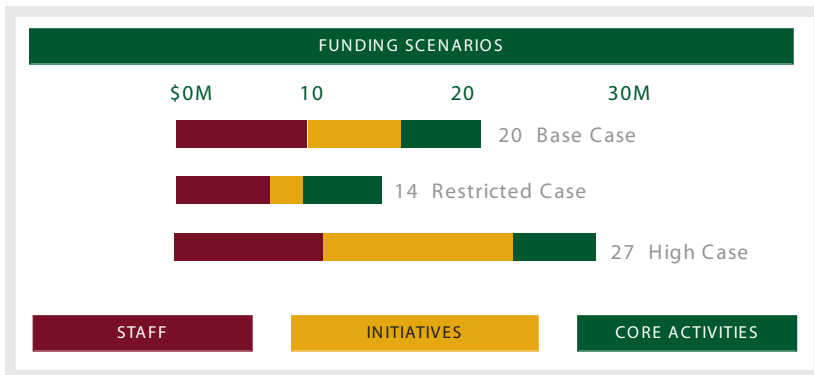
National Office activities will vary based on the level of funding it receives

	BASE CASE FUNDING (3-YR TOTAL: \$20-27M)	RESTRICTED FUNDING (3-YR TOTAL: \$14-18M)	HIGH FUNDING (3-YR TOTAL: \$28-34M)
CORE ACTIVITIES	Create and maintain core supports	Create and maintain core supports	Create and maintain core supports
INITIATIVES	Conduct two new initiatives: > Student achievement data > Targeted public engagement Continue existing initiatives (Citi, Lumina)	Conduct no new initiatives Continue existing initiatives (Citi, Lumina)	Continue expanded versions of: > Student achievement data > Targeted public engagement Conduct teacher effectiveness/Urban Teacher Residency initiative Continue existing initiatives (Citi, Lumina)
STAFF	Hire new core staff (Development Communications, Field, Research & Impact) Add four initiative staff	Align existing staff as necessary Hire only select new core staff	Hire new core staff Add additional initiative staff as needed
OTHER RESOURCES	Invest in website and technology upgrades	Invest moderately in technology upgrades	Invest in website and technology upgrades

∇

PEN MAY ALSO CONDUCT INITIATIVES RELATED TO EARLY LITERACY, STUDENT SUPPORTS, AND EXPANDED COLLEGE ACCESS SHOULD IT RECEIVE FUNDING TO DO SO

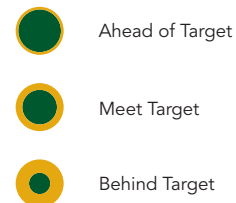
Initiative investment will be the most variable category of costs from 2010-2013























Three scorecards will be used to understand individual and collective PEN impact.

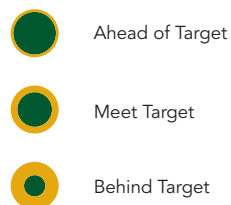
#1: Each LEF will measure and report performance against seven core goals

		PRIORITIZED INDICATOR FOR PEN	TARGET	ACTUAL	STATUS	TREND	SUGGESTED MEASURES
Student Achievement	Impact	% increase, # of additional low-income/minority 9th graders who graduate College and Career Ready (C&CR) in 4 yrs. in comm. served	%, #	%, #			Federal formula
		% increase, # of additional low-income/minority students on-track to be C&CR in comm. served	%, #	%, #			Academic performance and attendance
	Status of academic conditions/resources	% increase, # of additional low-income/minority students participating in key C&CR courses and programs in comm. served	%, #	%, #			To leverage IDEA CA metrics
		% increase, # of additional low-income/minority students being taught by effective teachers in comm. served	%, #	%, #			Measured by value-add, teacher efficacy composite index
Sustained public commitment	Impact	Status of C&CR academic and wraparound policies/resources advocated for by stakeholders	—	—			LEF to set goals w/guidance, provide detail
	Status of demonstrated support	% of targeted partnerships fulfilling agreed commitments to specific goals	%	%			LEF to set goals, provide details
		% of targeted stakeholders taking individual and collaborative action for C&CR policies, resources	%	%			LEF to set goals w/guidance, provide details



#2: National Office will also track and report key indicators of operational performance

	INDICATOR	TARGET	ACTUAL	STATUS	TREND	COMMENTS
Effective network support	% of LEFs believing National Office broad support (e.g. Federal Update) helped increase impact	%	%			National Office to determine appropriate instrument with input from Board
	% of federal and state advocacy goals met in support of the network	%	%			National Board to set goals and report on % met
	% of communication targets reached with messages re: LEF impact, context, best practices	%	%			National Office to set goals and report on % met
Staff	% of critical staff roles filled	%	%			National Office to identify critical roles
Financial	Months of operating reserve (minus debt obligations)	#	#			—
	% of unrestricted funding raised	%	%			—
	% of revenues raised to meet budget	%	%			—
Board	Average % of board attending meetings	%	%			Average across all board meetings
	Average % committee participation	%	%			Committees identified by board/National Office
	% of board meeting annual give-get policy	%	%			Give-get policy set by board/National Office



#3: PEN will track and report its collective impact and effectiveness as a network

		PRIORITIZED NETWORK INDICATORS	TARGET	ACTUAL	STATUS	TREND	COMMENTS
Combined impact of PEN	Student achie- vement	% of LEFs meeting targets for and median % increase/ # of additional low-income/minority 9th graders who graduate C&CR in 4 yrs	% , % , #	% , % , #			National Office to report best examples
		% of LEFs meeting targets for and median % increase/ # of additional low-income/minority students on-track for College and Career Ready (C&CR)	% , % , #	% , % , #			National Office to report best examples
		% of LEFs meeting targets for and median % increase/# of additional low-income/minority students participating in key C&CR courses and programs in communities served	% , % , #	% , % , #			National Office to report best examples
		% of LEFs meeting targets for and median % increase/ # of additional low-income/minority students being taught by effective teachers	% , % , #	% , % , #			National Office to report best examples
Sustained public commit- ment	Sustained public commit- ment	% of LEFs meeting goals for academic and wrap-around policies/resources advocated for by stakeholders	%	%			National Office to report best examples
		% of LEFs meeting goals for targeted partnerships fulfilling agreed commitments to specific goals	%	%			National Office to report best examples
		% of LEFs meeting goals for targeted individual and collaborative stakeholder action	%	%			National Office to report best examples
Sustained public commit- ment	Aligned members	% of LEFs qualifying as high-capacity	%	%			National Office to report best examples
	Active partici- pants	% of LEFs attending at least one of Leadership Symposium/National Conference/webinars	%	%			—
		% of LEFs paying dues on time	%	%			—

National Office will seek growth and Board funds, while building core funders and a diverse portfolio

IDENTIFY SPECIFIC GROWTH FUNDS

Identify and pursue specific growth funds to support:

- + Costs and projects needed to fulfill strategic plan
- + Other discrete initiatives/projects in the future

INCREASE BOARD DONATIONS AND FUNDRAISING

Raise unrestricted funding from Board donations or connections to support National Office general capacity and ongoing activities

SECURE CORE FUNDERS

Pursue multi-year support to implement the strategic plan from core foundation and corporate funders

PURSUE BROADER PORTFOLIO OF FUNDING

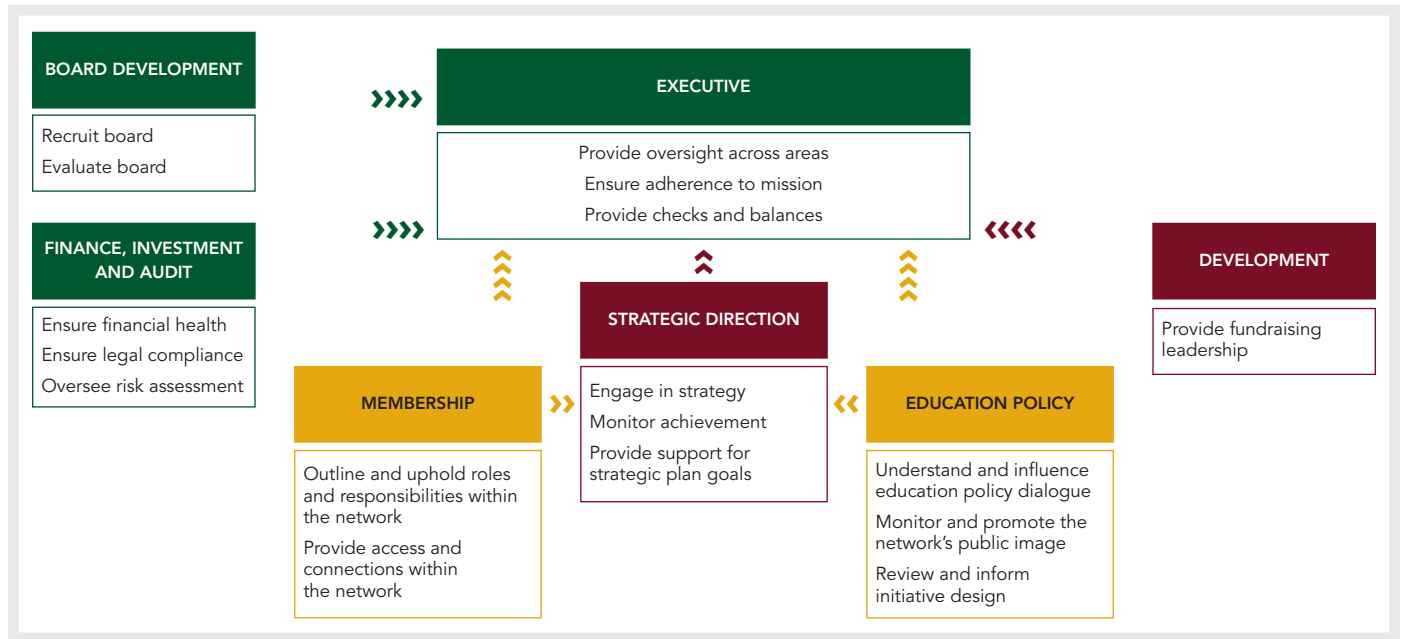
Seek unrestricted support from individual donors

Secure additional federal funding for specific initiatives

Network boards typically fulfill a range of functional roles

	ROLE	DESCRIPTION
Governance	Financial and legal governance	Ensure financial health Ensure legal compliance Oversee risk assessment
	Leadership oversight	Hire and evaluate CEO and develop succession plans Ensure appropriate senior team and organizational structure Evaluate board
	Board vitality	Recruit board
	Adherence to mission	Approve changes to or expansion of mission Monitor adherence to mission – provide checks and balances
Leadership	Strategic support	Engage in and approve strategy Monitor achievement of strategic goals and intended outcomes Provide ongoing strategic advice Provide select operational support for strategic goals
	Fundraising leadership	Make direct contributions and/or Assist in obtaining funds or otherwise developing revenue strategy
Connections	Internal connections	Outline and uphold roles and responsibilities within the network Provide access and connections within the network
	External influence	Monitor and promote the network's public image Understand and influence topical dialogue

PEN's Board committees fulfill roles of governance, leadership, and connections



The National Office is taking five steps to bring this plan to life

SHARE THE VISION

Build ownership of new strategic direction from LEF communities and broader stakeholders

FILL CRITICAL ROLES

Fill new positions, beginning with Director of Development and SVP of Network and Impact

Re-orient and expand board roles

SECURE LAUNCH FUNDING

Obtain the funds needed to implement plan

Broaden funding base to ensure the sustainability of National Office

CREATE A CULTURE OF IMPACT

Build data systems and accountability mechanisms for PEN to assess and maximize its impact; add dedicated impact staff in National Office

INVEST IN INITIATIVES

Partner with select LEFs for specific, measurable goals for student achievement and sustained public commitment

PEN will help millions of students nationwide be prepared and inspired for postsecondary success

LEFs develop cutting-edge innovation and adopt best practices

Community stakeholders take bold action

Policies and resources created to benefit low-income and minority students



MILLIONS OF LOW-INCOME AND MINORITY STUDENTS GRADUATE READY TO SUCCEED IN COLLEGE AND A CAREER

Public Education Network Members

ALABAMA

Mobile Area Education Foundation (Mobile)

ALASKA

Citizens for the Educational Advancement of Alaska's Children (Tok)

ARIZONA

Voices for Education (Tucson)

ARKANSAS

El Dorado Education Foundation (El Dorado)

Public Education Foundation of Little Rock (Little Rock)

CALIFORNIA

Alliance for College-Ready Public Schools (Los Angeles)

Berkeley Public Education Foundation (Berkeley)

Boyle Heights Learning Collaborative (Los Angeles)

Los Angeles Education Partnership (Los Angeles)

Marcus A. Foster Educational Institute (Oakland)

San Francisco Education Fund (San Francisco)

Linking Education and Economic Development (Sacramento)

Silicon Valley Education Foundation (San Jose)

COLORADO

Public Education & Business Coalition (Denver)

CONNECTICUT

Bridgeport Public Education Fund (Bridgeport)

Achieve Hartford! (Hartford)

New Haven Network for Public Education (New Haven)

Norwalk Education Foundation (Norwalk)

Stamford Public Education Foundation (Stamford)

DISTRICT OF COLUMBIA

DC VOICE
Parents United for the DC Public Schools

FLORIDA

The Education Fund (Miami)

Hillsborough Education Foundation (Tampa)

Foundation for Orange County Public Schools (Orlando)

Jacksonville Public Education Fund (Jacksonville)

GEORGIA

Atlanta Education Fund (Atlanta)

INDIANA

The Public Education Foundation (South Bend)

KENTUCKY

Forward in the Fifth (Somerset)

LOUISIANA

Academic Distinction Fund (Baton Rouge)

Greater New Orleans Education Foundation (New Orleans)

The Orchard Foundation (Alexandria)

MARYLAND

Fund for Educational Excellence (Baltimore)

MASSACHUSETTS

Boston Plan for Excellence in the Public Schools (Boston)

Lynn Business/Education Foundation (Lynn)

Mary Lyon Education Fund (Shelburne Falls)

MICHIGAN

Youth Development Commission (Detroit)

MINNESOTA

Achieve!Minneapolis (Minneapolis)

MISSISSIPPI

Association for Excellence in Education (Laurel)

NEBRASKA

Foundation for Lincoln Public Schools (Lincoln)

NEW JERSEY

East Orange Education Foundation (East Orange)

Montclair Fund for Educational Excellence (Montclair)

Paterson Education Fund (Paterson)

NEW YORK

New Visions for Public Schools (New York)

Yonkers Partners in Education (Yonkers)

NORTH CAROLINA

Mecklenburg Citizens for Public Education (Charlotte)

Chatham Education Foundation (Pittsboro)

Guilford Education Network (Jamestown)

Alamance Citizens for Education (Burlington)

Wake Education Partnership (Raleigh)

OHIO

Center for Leadership in Education (Elyria)

KnowledgeWorks Foundation (Cincinnati)

Partnership for Education in Ashtabula County (Ashtabula)

OREGON

Portland Schools Foundation (Portland)

PENNSYLVANIA

A+Schools: Pittsburgh's Community Alliance for Public Education (Pittsburgh)

Lancaster Foundation for Educational Enrichment (Lancaster)

The Consortium for Public Education (McKeesport)

Philadelphia Education Fund (Philadelphia)

Chester Education Foundation (Chester)

PUERTO RICO

Puerto Rico Community Foundation (San Juan)

SOUTH CAROLINA

The Alliance for Quality Education (Greenville)

The Charleston Education Network (Charleston)

The Education Foundation (North Charleston)

The School Foundation Inc. (Florence)

TENNESSEE

HC*Excell (Morristown)

Partners in Public Education (Memphis)

Public Education Foundation (Chattanooga)

TEXAS

Citizens for Educational Excellence, Inc. (Corpus Christi)

Houston A+ Challenge (Houston)

Excellence in Education Foundation (Richardson)

WASHINGTON

Alliance for Education (Seattle)

WISCONSIN

Foundation for Madison's Public Schools (Madison)

WEST VIRGINIA

The Education Alliance (Statewide)

INTERNATIONAL MEMBERS

Synergeia Education Foundation (Philippines)

Foro Educativo (Peru)

Innovacion y Apoyo Educativo (Mexico)

JET Education Services (South Africa)

HakiElimu (Tanzania)

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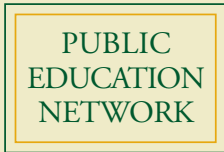
President
Alliance for Excellent Education

WENDY D. PURIEFOY

President
Public Education Network

MARGARET HILLER (EX-OFFICIO)

Executive Director
Bridgeport Public Education Fund



Public involvement. Public education. Public benefit.



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