



May 15, 2024

To Our ECS Community:

Many in our Community have asked for additional information regarding the Board's and GROW's work that led to the Board's development and adoption of its Five-Year Strategic Plan. We are pleased to share that information with you.

As we have explained in various Board meetings and conversations with our Community, the Board engaged GROW to help us undertake a fulsome, introspective look at every single aspect of ECS – its people, its processes, and its educational offerings. This process allowed us to gather further, and more robust, neutral data to assess the impact of decisions made during times of growth, expansion, COVID, and other situations. Our unwavering goal was, and remains, to ensure that we continue to celebrate and foster the unmatched educational experience and Community at ECS and to protect it for future generations, as we are obligated to do.

Enclosed is the GROW Summary Findings and Recommendations Report, which outlines the initial work conducted by GROW and presents its factual findings and initial recommendations. The Board then used this information, some of which has been redacted due to the confidential and sensitive personnel information contained within it, in the development of its Strategic Plan. We trust that you will see how the nearly uniform feedback from our Community is at the root of our Strategic Plan and how it encapsulates the wisdom, insights, and aspirations of so many within our remarkable ECS Community. We continue to remain excited about this next chapter in our school's future and look forward to executing this plan with the involvement and support of our ECS Community

Sincerely,

The ECS Board of Directors

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Recommendations for a Strategic Framework

Endeavor Charter School
September 7th, 2023





Agenda

Introduction

Findings

Recommendations

Appendix

Introduction

How it started, where we've been and where we are now.

The History of Endeavor Charter School

How it started: A Story

Once upon a time, three great minds came together to create a charter for a school that would exemplify what a public school should offer students. **Steve McAdams**, Christi Whiteside, and Maija McAdams left their public-school careers to launch Endeavor Charter School in Raleigh, NC, with 376 students in October of 2007. Steve McAdams served as the first director of ECS from 2007 to 2015. Steve was a visionary lifelong educator who was passionate about students, athletics, and his colleagues. All the teachers, staff, and community members who were part of ECS under Steve's leadership have fond memories of him.

Maija McAdams, Steve's daughter-in-law, is one of the original co-founders of ECS and has worn many hats over the years. She is currently a 5th-grade ELA teacher and is still committed to the mission and vision of the school, while choosing not to be in a leadership role.

Christi Whiteside succeeded her father Steve as the ECS school director in 2015 after Steve's retirement. Christi, being one of the original co-founders of ECS, also served as the Board Chair during the founding year and then Assistant Director and Curriculum Coordinator before taking the seat of School Director. Steve was a great role model for Christi and so she strives each day to live up to the standard he set for leadership at ECS.



The History of Endeavor Charter School

Where it's been: A History

Endeavor Charter School's mission is to engage K-8 students by integrating a challenging, hands-on academic program with multi-faceted fine arts courses in a familial environment.

This is a mission that the school leadership and the Board of directors have held onto since the Charter was established in 2007. It is also the reason that parents, teachers, and staff participate in the school as stakeholders and long-term investors in the success of ECS.

What started as the ideal public school has doubled in population with about 800 students, an additional 29 Acres of land, and a 56,000-sf middle school facility furnished with a 300-seat auditorium and a full-size gymnasium.

Despite the school's expansion, several qualities that made ECS attractive to its stakeholders have not changed.

However, some areas of weakness have emerged that need to be addressed in the near term, medium term, or long term to make strategic changes that are sustainable.



The History of Endeavor Charter School

Where it is now: At a Crossroad

During the pandemic years, 2020 and 2021, ECS met with and overcame significant challenges.

The ECS Board was called into action to provide guidance, make decisions and launch initiatives that helped to maintain a strong school, but were more granular than typical board mandates.

It was also during these years that the ECS's campus extension was built, and shortly after the pandemic, the middle school moved into the new building.

Over this time, this transition from the pandemic's survival mode, to the expansion and then to post-expansion mode, left the community feeling the loss of its original sense of intimacy and connectedness.



The History of Endeavor Charter School

Where it is now: At a Crossroad

The changing atmosphere was further felt by the ECS leadership and Board when several legal actions were taken against the school, with the emergence of student behaviors that were historically uncharacteristic of ECS students, with increased parent complaints and questions being raised about the leadership-fit of the school. Several foundational questions were being raised in the community:

- Had ECS grown too quickly at the expense of its culture?
- Was ECS's leadership team able to maintain the School's Mission?
- What was needed for ECS to retain/regain its sense of community, purpose and identity?

The ECS board will now have the evaluative findings and subsequent recommendations that will serve to answer these questions and determine the School's path forward.



“It is not as much
about who you
used to be, as it is
about who you
want to be”

– Sanhita Baruah



The Grow Associates Team

Project Team

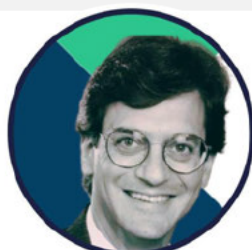


Gaby Rowe

Executive Project Lead

Gaby Rowe is the CEO and Managing Principal of Grow Associates. Gaby was born into a family of educators on the Upper West Side of New York City. While her circuitous career has taken her from investment banker to school principal to technology innovator to public policy and implementation consultant, Gaby's focus has always been on high impact projects that serve to transform the lives of young people and enable economic empowerment, digital equity and opportunity.

Under her leadership, Grow Associates has also led technology enabled strategic projects for the State of Texas, the City of Houston, Dell, Intel, Arundo Analytics, Aramco and Marathon Oil. Throughout her career, Gaby has been on numerous task forces to promote diversity and inclusion for underserved populations and has been recognized for this work by the NY Times, the Houston Business Journal, the Wall Street Journal and the U.S. House of Representatives.



Ken Cohen

Co-Executive Project Lead

Ken is a Managing Principal of Grow Associates. With over 30 years of experience as a senior executive and innovation consultant in the technology, manufacturing and education sectors, Ken's passion is to enable entrepreneurs, innovators, and developers by leveraging the tools of change management, entrepreneurship and start-up implementation. Ken's skills include strategy development and implementation, business development and consultative sales, finance, accounting and compliance, legal affairs, audit management, information technology solution development, deployment, and project management.

Ken has led the growth and development of numerous technology and software initiatives across a wide variety of companies and industries in both the public and private sectors. The common thread throughout the span of Ken's career has been helping people and organizations navigate new learning, processes, and technology needed to both create and manage innovation disruptions.



Joana Nunoo

Project Manager

Joana Nunoo serves as Grow Associates' Business Development and Engagement Manager. As BDEM, it is Joana's responsibility to maintain and strengthen client relationships from their first introduction to Grow Associates all the way through the end of their client engagements.

Joana started her career as a teacher and instructional leader in the Houston Independent School District. At the helm of her tenth year, she took an opportunity to launch into the start-up space, working for an early-stage technology company with a focus on developing a learning support program for under-resourced schools. Joana is a recent MBA graduate from Rice University's Jones Business School where she concentrated her studies in Entrepreneurship and Corporate Strategy. Her teaching experience combined with time-spent in the start-up environment and MBA training have all contributed to the way she expertly navigates client relationships while staying focused on developing strategies that meet clients' needs.



GROW's Strategic Approach

What we did

GROW's work, as represented in this presentation, is about supporting Endeavor Charter School (ECS) through the process of becoming **who it wants to be** moving forward.

To do this, the Grow Associates team extensively evaluated the current state of ECS through due diligence as well as interviews and roundtables with representatives from various stakeholder groups.

GROW specifically requested representation in these groups from a diverse range of backgrounds and viewpoints to ensure an unbiased and all-encompassing evaluation.

GROW synthesized consistent themes that evolved from this work. From those themes, crafted a set of recommendations for ECS that are based on our experience and best practices in K-12 education.



GROW's Strategic Approach

What you can expect

Drawing upon a GROW's combined experience of over 70 years in educational leadership, operations, and teaching, the ECS Board of Directors can expect that the Findings and Recommendations presented by the GROW team will be based upon a wealth of expertise, extensive experience, and the unique perspective that comes from working with a wide range of schools. Our findings and recommendations are:

- Designed to build upon ECS's achievements and its unwavering dedication to its mission and vision.
- Developed based upon meticulous analysis that provides data-driven insights, that serves to mitigate risks, to guide transitions, formulate impactful communication strategies and that prioritizes sustainability over time.
- Tailored to both the unique needs and culture of ECS and to best practices and industry standards of excellence.



GROW's Strategic Approach

What you will NOT see

The GROW team operates with a school-by-school approach that does **not offer** immediate, standardized solutions. We believe in a comprehensive process that sidesteps the pitfalls of one-size-fits-all remedies. While our commitment lies in driving positive changes as rapidly as possible, we do not, and cannot, commit to immediate transformation without the thorough evaluation of "unintended consequence". Therefore, **our recommendations will not be "If, then" statements**. Instead, they will outline pathways and frameworks that ECS can employ moving forward and which we believe will ultimately lead to success.

It's important to note that the GROW team would never presume to make decisions on behalf of ECS.

Ultimately, the responsibility for decision-making resides with the ECS Board. Our objective is to equip you with insights, strategies, and possibilities, thereby empowering the Board to make well-informed and effective choices that best align with ECS's interests and aspirations.



Stakeholder Engagement Interviews

By engaging a diverse range of stakeholders, the GROW team developed a comprehensive understanding of the school's ecosystem, effectively capturing a broad spectrum of insights, concerns, and ideas. This approach ensured that the resulting recommendations are well-informed, holistic, and aligned with the needs and aspirations of the entire Endeavor Charter School community. These interviews broke down as follows:

- 4 Board Members
- 2 Senior Leadership
- 6 Leadership
- 6 Parents
- 3 PAWS leaders
- 3 Administrative staff
- 50+ Teachers and staff



Stakeholder Engagement

Board Alignment Session

The GROW team conducted an in-depth and comprehensive 4-hour working session with the ECS Board. The focal point of this session was an extensive exploration of the school's mission and vision.

The Board Alignment working session culminated in a SWOT analysis exercise, where participants diligently assessed the school's strengths, weaknesses, opportunities, and threats. This approach enabled GROW to gain valuable insights that served as foundational elements for our strategic recommendations.



Stakeholder Engagement

School Visit

The GROW team conducted a half-day school visit of multiple classrooms to observe teachers and students at work in their "everyday" learning environment.

This visit served to provide firsthand insights into the dynamics of daily classroom activities, instructional methods, intra-day transitions and student engagement.

This on-site observation provided valuable context to complement the stakeholder interviews and Board Alignment Session, enabling the GROW team to develop a well-rounded understanding of the school's educational practices and to identify areas of strength and potential areas for improvement.



Our Comprehensive Approach Structure

The stakeholder interviews were carefully structured to incorporate a balanced mix of virtual and in-person one-on-one meetings. This approach ensured flexibility and convenience for a diverse range of participants, including Board members, school leadership, staff, and parents.

Teachers actively engaged in eight very well attended round-table sessions, with an average attendance of six+ educators in each session.



Our Comprehensive Approach Engagement

The interview process was designed to foster a collaborative and inclusive environment, resulting in transparent and open dialogue. All interviews were conducted in confidence and outputs are non-attributable.

Participants, including teachers, Board members, school leaders, staff, and parents, were invited to openly share their perspectives and did so with little to no reservation. Guided by the agreed-upon set of interview questions, the conversations encouraged participants to express their insights without limitation. This approach promoted genuine engagement, allowing stakeholders to contribute meaningfully to the process.



Our Comprehensive Approach

Duration

To ensure in-depth discussions, each individual interview spanned at least 45 minutes. This enabled focused conversations while accommodating the schedules of busy stakeholders.

The round-table sessions were extended to 90 minutes, providing ample time for comprehensive contributions by all involved. This time commitment on the part of staff members underscores their belief in this process and the significance GROW has placed on their thoughts and insights.



Our Comprehensive Approach

Outcomes

The results of these interactions were evident in the quality and substance of outcomes.

All participants, ranging from Board members to parents to teachers, showcased a strong sense of engagement and pride in contributing to the interview process and to the future of ECS.

Their valuable insights offered a diverse range of perspectives, while several participants went beyond observations to offer innovative suggestions. These contributions not only enriched the strategic framework building process but also highlighted the impact of the interview approach in shaping the direction of the GROW team's recommendations.



GROW's Process

Terminology and Structure

GROW's strategic framework evaluation process, often referred to as the "3P" analysis, focuses on assessing an organization's key elements: **People**, **Product**, and **Process**. This comprehensive evaluation identifies strengths, weaknesses, opportunities, and threats in a way that enables ECS to make informed decisions and enhance its overall performance and success for years to come.

Here's an overview of what is included in the 3Ps:



▪ **People Evaluation:** Leadership and Talent, Skills and Training, Culture and Engagement and Succession Planning



▪ **Product Evaluation:** Product Portfolio, Quality and Innovation, Customer Satisfaction and Market Positioning



▪ **Process Evaluation:** Operational Efficiency, Risk Management, Compliance and Regulations and Continuous Improvement

Throughout our presentation of GROW's findings and recommendations will refer to the 3Ps, and their assigned icons will serve as a guide throughout our discussion.

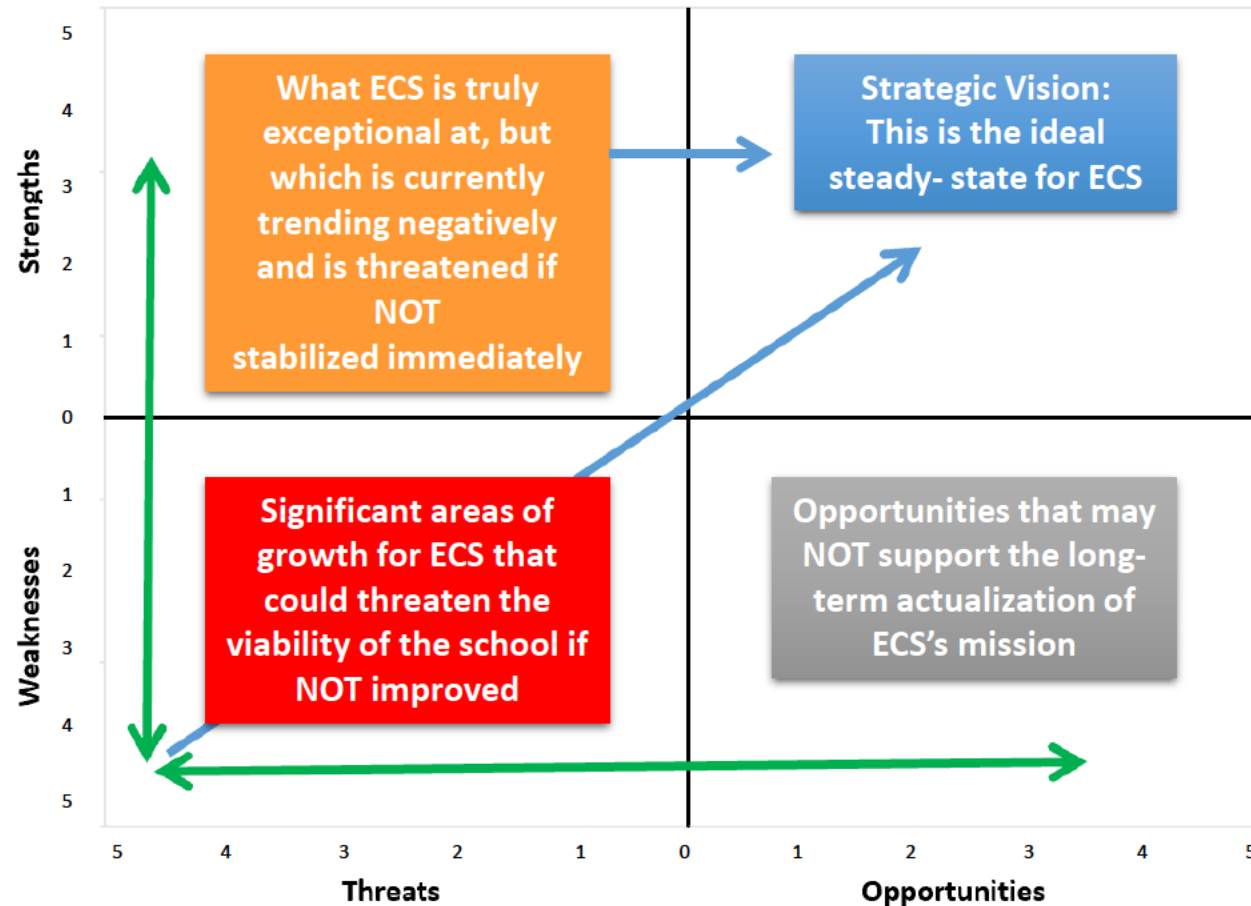


Our Findings

We captured these finding and developed our recommendations to support the process of ECS choosing who it wants to be going forward.

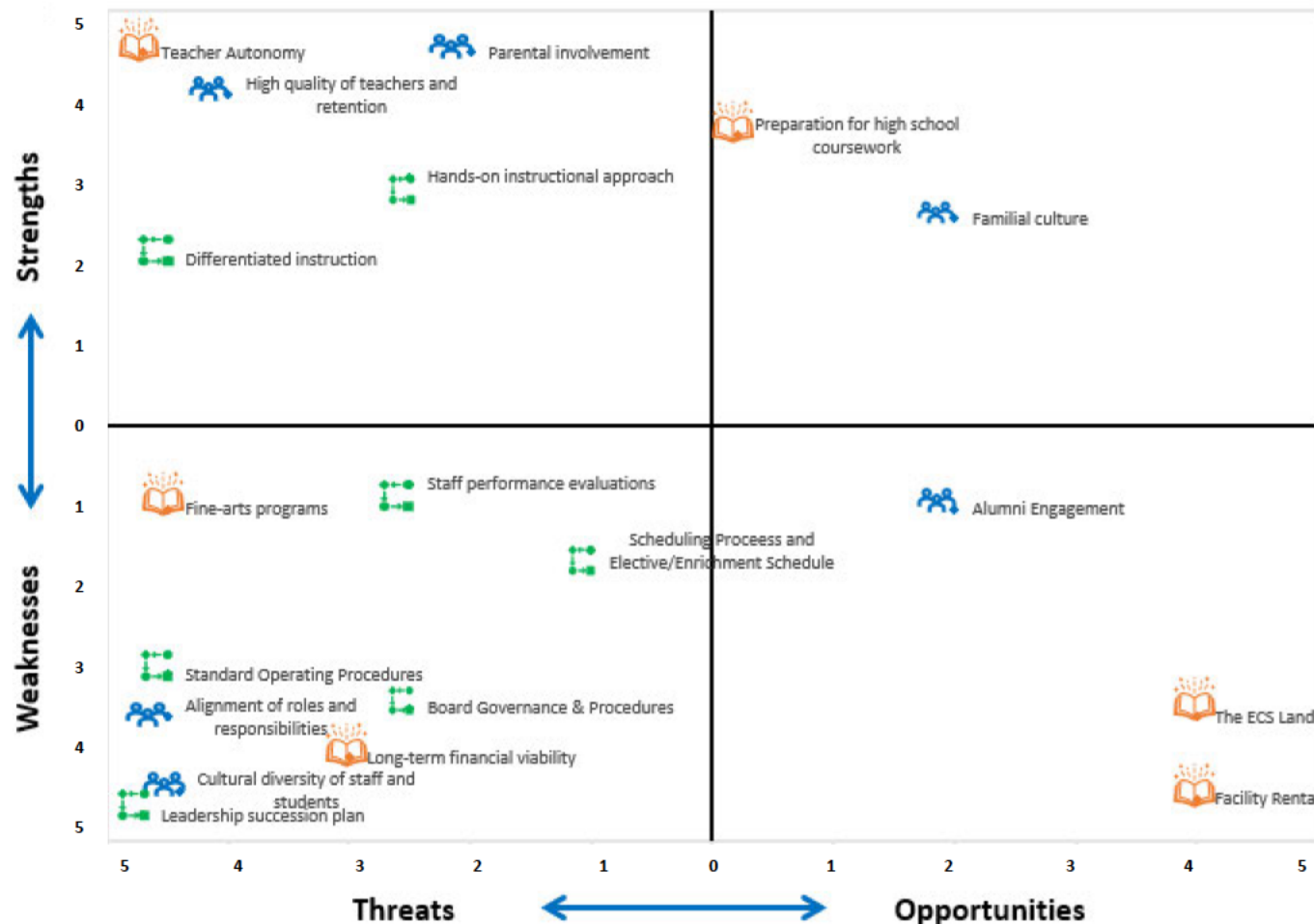
Strategic SWOT Analysis

Terminology and Structure



Strategic SWOT Analysis

Moving towards ECS' Strategic Vision



Key

People

Product

Process



Key Findings

People

STRATEGIC VISION	<ul style="list-style-type: none"> ▪ Familial Culture <ul style="list-style-type: none"> ▪ ECS's unique sense of community and individualized attention create a safe space.
STRENGTHS	<ul style="list-style-type: none"> ▪ High Quality Of Teachers And High Teacher Retention <ul style="list-style-type: none"> ▪ The teachers are highly educated, happy to be there, and receptive to students' needs and concerns ▪ Parental Involvement <ul style="list-style-type: none"> ▪ ECS fosters strong parental involvement, with teachers, the school board, principal, and others being easily reachable for concerns and questions.
OPPORTUNITIES	<ul style="list-style-type: none"> ▪ Alumni Engagement <ul style="list-style-type: none"> ▪ After 15 years of existence, ECS has past students in the work-force or higher education who may be interested in giving back their time and talents
THREATS AND WEAKNESSES	<ul style="list-style-type: none"> ▪ Alignment Of Roles And Responsibilities <ul style="list-style-type: none"> ▪ Negative shift away from teacher autonomy ▪ The members of the administrative staff have too many overlapping roles and responsibilities ▪ Several members of administration do not feel qualified or well prepared to execute certain responsibilities. ▪ Cultural Diversity Of Staff And Students <ul style="list-style-type: none"> ▪ ECS does not intentionally attract and retain minority students and teachers.



Key Findings

Product

STRATEGIC VISION	<ul style="list-style-type: none"> ▪ Preparation For High School Coursework <ul style="list-style-type: none"> ▪ ECS has historically been highly effective in terms of academic impact, with students being well-prepared for higher grades and future education
STRENGTHS	<ul style="list-style-type: none"> ▪ Teacher Autonomy <ul style="list-style-type: none"> ▪ Teachers had control over their instructional time. They worked together on their grade-level teams to create their schedules, communicate with parents and use all kinds of qualitative and quantitative student data to make decisions. ▪ The introduction of too many new processes have created barriers for teachers to continue having the autonomy and effectiveness they enjoyed in the early years
THREATS AND WEAKNESSES	<ul style="list-style-type: none"> ▪ Fine-arts Programs <ul style="list-style-type: none"> ▪ Parents loved the incredible performances and art projects that were characteristic of the ECS education. ▪ There is a clear sense throughout the community that in recent years, that the decision to decrease the fine arts program to one semester for each student due to scheduling challenges has critically weakened the program ▪ Broadening away from the name "fine arts" is perceived as substantially decreasing the value of the program and calls the connection to the mission into question



Key Findings

Product cont.

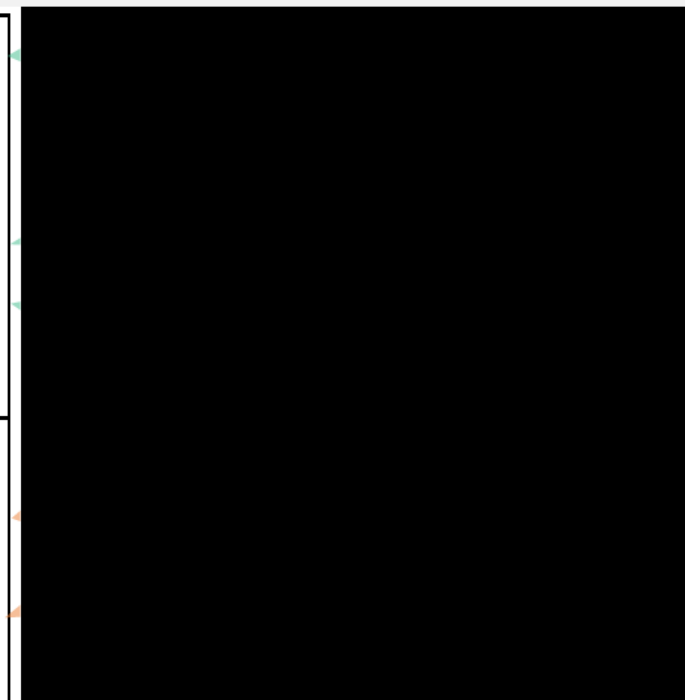
THREATS AND WEAKNESSES	<ul style="list-style-type: none">▪ Long Term Financial Viability<ul style="list-style-type: none">▪ ECS has a heavy reliance on generating funds through either fundraising or increased student head-count▪ There is a perceived lack of transparency and communication about how school raised funds are being used and about the challenges of the school budget overall▪ Financial statements are managed by volunteers
OPPORTUNITIES	<ul style="list-style-type: none">▪ Facility Rental<ul style="list-style-type: none">▪ The new 300 seat auditorium has the potential to generate income from 3rd party rental outside of normal school hours, albeit with costs▪ The ECS land<ul style="list-style-type: none">▪ Is underutilized and is a potential valuable "hidden" asset for the school



Key Findings

Process

STRENGTHS	<ul style="list-style-type: none"> ▪ Hands-on Instructional Approach <ul style="list-style-type: none"> ▪ ECS teachers are praised for their ability to engage students in a hands-on approach to learning in the lower grades ▪ Instruction in the upper grades have room for improvement for hands-on learning ▪ Differentiated Instruction <ul style="list-style-type: none"> ▪ Teachers lack the resources to effectively differentiate or provide enrichment opportunities for higher achieving students ▪ All current differentiation efforts focus on MTSS and EC students, which represent a small percentage of the student population
THREATS AND WEAKNESSES	<ul style="list-style-type: none"> ▪ Staff Performance Evaluation <ul style="list-style-type: none"> ▪ ECS lacks an internal teacher appraisal process, which will allow it to identify teaching best practices and growth areas of teachers ▪ Standard Operating Procedures (SOPs) <ul style="list-style-type: none"> ▪ The current technology support procedure is overwhelming and unsustainable ▪ The facility management is lacking effective protocols and resources for safety and efficiency ▪ Absence of effective procedures for management of students with special needs, including behavioral needs



Key Findings

Process cont.

THREATS AND WEAKNESSES

- **Scheduling Process and Elective/Enrichment Schedule**
 - The Elective scheduling process is vague and unbalanced
 - There's a "haphazard" selection of Electives to choose from
 - Teachers in the higher grades feel they do not have enough time to cover the content sufficiently, especially in math because it limits their ability to use a hands-on approach
- **Board Governance and Procedures**
 - There is no established comprehensive process for onboarding new Board Members
 - Board members are often pulled into the day-to-day operational challenges of the school to offer support, opinions and advise beyond what would be considered "standard" board matters
- **Leadership Succession Plan**
 - There is NO leadership succession plan and the lack of such a succession plan may result in a loss of valuable institutional knowledge and experience in the absence of the co-founders



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Recommendations for a Strategic Framework

Endeavor Charter School
September 8th, 2023





Agenda

Introduction

Findings

Recommendations

Appendix

Our Recommendations

A Framework for Strategic Action

“The best time to
plant a tree was
20 years ago. The
second-best time
is now”

- Chinese Proverb



Our Recommendations

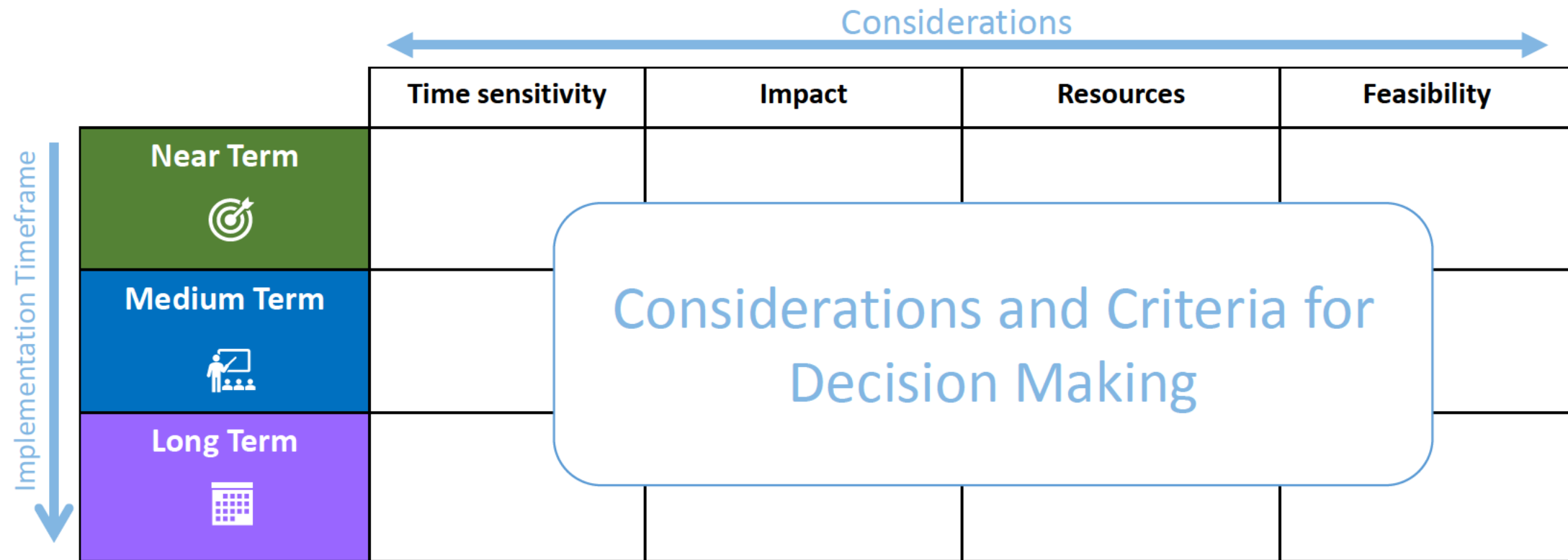
A Framework for Strategic Action

The purpose of our recommendations is to reflect what can be, not what should have been. Therefore, all our recommendations will be provided through an analytical “Decision Framework” that will both guide the board as it considers ECS’ future and model a governance process which the board can use throughout its future work.



The Decision Framework

Terminology and Structure



The Decision Framework

What to do when

	Time sensitivity	Impact	Resources	Feasibility
Near Term 	Urgent There is a pressing need to address this in the immediate future.	Immediate It will lead to immediate improvement or alleviate current challenges.	Available The necessary recourses (time, budget, personnel) are available in the short-term. Implementation can be outsourced in the absence of internal resources.	Known Industry best practices are established and available. No cultural change management is required.
Medium Term 	Timely There are prerequisites or foundational steps that need to be taken.	Sustainable There could be unintended negative consequences that need to the thought through and addressed .	Forthcoming The required resources can be attained in the next one to two years. Some internal resources will be necessary for implementation.	Unclear Limited industry best practices exist. Cultural change management is required.
Long Term 	Strategically Aligned It aligns with the vision and goals of the school however; it is complex and requires detailed planning and execution.	Transformational The impact will be realized over a longer period and bring about a new state and level of effectiveness.	Sustained Significant resources will have to be allocated over an extended period.	Unknown No clear path for implementation currently exists. Represent significant shifts in operations and culture.



Timeline Definitions



Near Term

Immediate area of focus using the Decision Framework. Executed in the next 3-10 months.



Medium Term

Begin planning at the end of this school year for execution beginning no sooner than 10 months and ending no later than 36 months from now.



Long Term

Begin planning 24 months from now with execution beginning no sooner than 36 months now and ending no later than 60 months.



Near Term Recommendations

People



CONDUCT A FULL TALENT EVALUATION PROCESS

- **Comprehensive Job Descriptions:** Develop detailed job descriptions for every role within ECS. These descriptions should outline the responsibilities, required skills, qualifications, and expected outcomes for each position. These job descriptions will provide transparency and consistency in understanding roles across the organization.
- **Individual Self-Evaluation:** Implement a structured self-evaluation process for all employees. This process will encourage employees to reflect on their own skills, strengths, weaknesses, and aspirations, and assess how well these align with their current roles and future goals. *Example: What do you want to be doing and are you qualified to do it?*
- **Targeted Development Opportunities:** Identified skill assets and skill gaps from the self-evaluations will provide valuable insights for crafting targeted professional development plans. ECS can offer growth opportunities, training, workshops, and mentorship to leverage hidden skills and to bridge gaps and enhance the staff's effectiveness in their roles.



Near Term Recommendations cont.

People



CREATE A WORKING GROUP FOR DIVERSITY INITIATIVES

- **Identify the Purpose and Goals:** Determine what the group hopes to achieve, such as promoting diversity, equity, and inclusion, organizing cultural events, and celebrations that highlight different traditions, languages, and customs and addressing specific issues within the community that may be inhibiting diversity.
- **Recruit Members:** Invite individuals who are passionate about diversity and inclusion to join the working group. Consider including representatives from various stakeholder groups, including students, parents, teachers, staff, and administrators.
- **Develop an Action Plan:** Based on the research, data and best practices, create an action plan that outlines specific initiatives, strategies, and activities to address diversity and inclusion issues within the school.
- **Monitor and Report Progress:** Regularly report the group's progress to school leadership and stakeholders in order to maintain accountability and momentum.



Medium Term Recommendations

People



LAUNCH AND IMPLEMENT A REVISED ORGANIZATIONAL STRUCTURE

- **Design a new Organizational Chart:** Conduct a thorough analysis of the current organizational structure, considering factors like reporting lines, overlapping responsibilities, communication flow, and decision-making processes. Design the new chart to balance the workload and allow each leadership role to have an appropriate number of direct reports. Limit the intersection of school management and instructional responsibilities. *Example: Directors who are also CCs do not have the capacity to do both jobs effectively.*
- **Change Management:** Develop a comprehensive change management plan to effectively communicate the new structure to employees, manage any resistance, and ensure a smooth transition. Consider including some lead teachers and staff in the creation of the change management plan to increase their buy-in.

NOTE: Although this is a medium term recommendation, GROW strongly believes that this should be implemented for the 2024-2025 school year.



Medium Term Recommendations cont.

People



DEVELOP A PLAN FOR INCREASING CULTURAL DIVERSITY OF STAFF

- **Leadership and Accountability:** Assign responsibility for increasing diversity of staff to the working group for diversity initiatives.
- **Develop and Implement a Diversity Recruitment Strategy:** Develop a proactive recruitment strategy that targets teachers of different cultural backgrounds. Collaborate with community organizations, colleges, and universities to actively engage and attract diverse talent.



Long Term Recommendations

People



DEVELOP “GROWTH PATHS” FOR LEADERSHIP DEVELOPMENT AND SKILL ENHANCEMENT

- This is a proactive approach that fosters continuous learning, personal development, and fruitful collaborations both within ECS and with the regional educational community. This strategy involves creating structured pathways for individuals within ECS to expand their skills and expertise, while also facilitating mentorship relationships with external institutions (both public & private well as educational and enterprise).
- **Customized Growth Paths:** Design growth paths that outline clear steps for professional development within ECS. Identify skill sets, competencies, and experiences required to advance within different roles. Tailor growth paths to individual aspirations, allowing employees to set and achieve meaningful career goals. Ensure that these growth paths are part of the on-boarding process.
- **Leadership Development:** Integrate leadership development programs into growth paths to prepare employees for future leadership roles. Provide opportunities for leadership training, coaching, and mentorship.
- **External Mentorship Opportunities:** Connect ECS employees with mentors from external institutions to gain diverse perspectives. Facilitate cross-pollination of ideas and best practices from different sectors.



Long Term Recommendations cont.

People



DEVELOP A PLAN FOR INCREASING CULTURAL DIVERSITY OF STUDENTS

- **Leadership and Accountability:** Assign responsibility for increasing diversity of students to the working group for diversity initiatives.
- **Develop and Implement a Diversity Recruitment Strategy:** Develop a proactive recruitment strategy that targets minority students and students of different cultural backgrounds that represent the demographics of the school's location.
- **Implement Cultural Celebrations and Events:** Launch cultural celebrations that highlight different traditions, languages, and customs. Encourage active participation from students, teachers, and families.



Near Term Recommendations

Product



PLAN AND IMPLEMENT STRATEGIES FOR FINANCIAL STABILITY AND ENDOWMENT

- **Establish an Endowment Committee:** The committee should be responsible for overseeing the fund's development, management, investments, and disbursements. This committee should consist of knowledgeable individuals who can make informed decisions about the fund's operations.
- **Legal and Regulatory Considerations:** Consult with legal and financial advisors to understand the legal and tax implications of creating an endowment fund. Hire the services of an accounting professional who has expertise in school finance and accountability to work on ECS' budget and financial statements.
- **Educate Stakeholders:** Ensure that the school community, including staff, students, parents, and alumni, understands the purpose and benefits of the endowment fund. Engage them in its success.
- **Acquire seed funds:** Sell a portion of the ECS foundation land to a fit buyer and use the proceeds to fund the endowment.
- **Investment Strategy:** Develop a prudent investment strategy for the endowment fund. Consider working with investment professionals or firms with experience in managing endowments.



Near Term Recommendations cont.

Product



REVIVE THE FINE ARTS PROGRAM AS A FOCAL AREA IN THE VISION OF ECS

- **Restore the Fine Arts:** Give “Fine Arts” back its name.
- **Fine Arts Staff:** Staff and schedule it appropriately to provide students the year long exposure and year-to-year continuity in their areas of interest.
- **Student Engagement:** Make it about the student, NOT the parents or about the new space. Provide multiple opportunities for students to showcase their work and develop confidence in their craft.



Near Term Recommendations cont.

Product



CLEARLY DEFINE THE TYPES OF STUDENT AT ECS

- **Create Student Profiles:** Identify all student types, including the percentage % of ECS they make up, and create appropriate student profiles based on the characteristics, learning styles, and preferences of each student.
- **Considerations for Student Profiles:** Consider factors such as developmental stages, academic goals, social and emotional needs, cultural backgrounds, and extracurricular interests and use these to gauge the impact of both existing and new product initiatives.
- **Develop Student Pathways:** Develop a vision and goals for each student profile that aligns with ECS's strategic vision.



Medium Term Recommendations

Product



DEVELOP NEW VISION ALIGNED PRODUCTS

- **Launch New Products:** Develop new 'products,' such as academic and fine arts camps that tie into the mission of the school. Ensure that the camp's content, goals, and activities directly align with the school's mission, vision, and educational values. This consistency will reinforce the school's identity and attract families who resonate with its ethos.



Long Term Recommendations

Product



DEVELOP AN INTERNSHIP/EXTERNSHIP PROGRAM

- **Corporate Partnerships:** Secure recurring internships/externships with public/private corporate partners in the community for students in the upper grades.
- **Accountability:** Develop learning outcomes and accountability measures for students who participate.

DEVELOP EXPECTATIONS FOR COMMUNITY HANDS-ON EXPERIENCE AT EACH GRADE LEVEL

- **Cross-Curricular Hands-On Experiences:** Create opportunities for grade-level appropriate “Hands-on” community engagement that is directly linked to the learning in each grade. *Example: 1st graders plant a garden and 6th grade students engage in sorting and recycling.*



Near Term Recommendations

Process



ESTABLISH BOARD GOVERNANCE PROCEDURES

- **Onboarding process:** Create a robust onboarding process that includes an in-depth understanding of ECS's vision and mission, what makes ECS a special place and the expectations of the role.
- **Clearly define the Board's roles and responsibilities:** Offer training sessions on topics such as education law, governance best practices, and conflict of interest policies. Provide opportunities for board members to attend workshops or conferences related to education governance and leadership.
- **Offboarding process:** Establish a process for exiting board members to properly exit the board and transition their responsibilities and access to sensitive information with minimal risk.
- **Succession planning:** Create a succession plan for board continuity by staggering terms.



Medium Term Recommendations

Process



DEVELOP A NEW SCHEDULING AND ELECTIVE SELECTION PROCESS (To be implemented in 2024-25)

- **Create a scheduling committee:** The committee should be composed of teachers and administrators who are committed researching best practices for implementing an effective schedule for a school of ECS' size, demographics and vision. The committee should be expected to
 - ☐ Develop independent schedules for Elementary and Middle schools that work in synch
 - ☐ Establish pathways for students who desire the continuity in certain fields to be given priority
 - ☐ Institute a process for contesting elective placement and schedule revisions
- **Hire Additional Dedicated Elective and Enrichment Staff:** For the quality of the elective and enrichment courses to be at their highest, ECS must identify and hire staff that will teach these courses moving forward. Core teachers and curriculum specialists should not be made to teach Electives unless they request it.



NOTE: Although this is a medium term recommendation, GROW strongly believes that this should be implemented for the 2024-2025 school year.

Medium Term Recommendations cont.

Process



REVISE OLD STANDARD OPERATING PROCEDURES (SOPs) AND DEVELOP NEW ONES

- **Comprehensive SOPs:** Develop a comprehensive set of Standard Operating Procedures (SOPs) that cover all the major areas of operations such as:
 - ☐ Administrative
 - ☐ Health and safety
 - ☐ Student Welfare
 - ☐ Operational and Facility Managements
 - ☐ Communication and Engagement
 - ☐ Ethical and Professional Conduct
- **Staff Training and Change Management:** Provide staff training for implementing the SOPs, giving the rationale behind each SOP to gain buy-in.
- **Continuous Monitoring:** Create a process for monitoring, evaluating, revising and updating the SOPs periodically to accommodate changing school needs.



Medium Term Recommendations

Process



CREATE A LEADERSHIP SUCCESSION PLAN

- **Identify Leadership Competencies:** Determine the key leadership competencies required to drive the organization's vision. These could include qualities like strategic thinking, adaptability, communication skills, and the ability to foster a positive organizational culture.
- **Identify Potential Successors:** Identify high-potential individuals within the organization who exhibit the desired leadership competencies. Consider both internal candidates and, if necessary, external options.
- **Provide Development Opportunities:** Design development programs and opportunities to nurture the potential successors' leadership skills. This could include mentoring, training, stretch assignments, workshops, and participation in strategic initiatives.
- **Regularly Review Progress:** Conduct regular performance reviews and discussions with potential successors to monitor their development and address any challenges.



Long Term Recommendations

Process



DESIGN AND IMPLEMENT A ROBUST PERFORMANCE EVALUATION PROCESS

- **Define Performance Metrics:** Define key performance indicators (KPIs) that align with ECS's goals for each role and provide measurable benchmarks for success.
- **Continuous Improvement:** Make the performance evaluation process an ongoing cycle throughout the school year, rather than a one-time event. The structure should require regular check-ins, feedback sessions, and follow-ups to ensure continuous improvement and accountability.
- **Difficult Conversations:** Build a culture that encourages constructive feedback and difficult conversations. Train appraisers and employees on effective communication techniques for addressing challenges and providing feedback.
- **Recognition and Rewards:** Integrate mechanisms to recognize and reward high performers, fostering motivation and a sense of accomplishment.
- **Performance Improvement Plan:** Develop a plan to enhance the skills and capabilities of struggling teachers with the tools, resources and timeline for improvement.



Summary of Recommendations

Recommendations	Near Term 	Medium Term 	Long Term 
Conduct a full talent evaluation process	 		
Create a working group for diversity initiatives	  		
Launch and implement a revised organizational structure			
Develop a plan for increasing cultural diversity of staff		  	
Develop “growth paths” for leadership development and skill enhancement			  
Develop a plan for increasing cultural diversity of students			  
Plan and implement strategies for financial stability and endowment	 		
Revive the fine arts program as a focal area in the vision of ECS			
Clearly define the types of student at ECS		 	
Develop new vision aligned products			 
Develop an internship/externship program			  
Develop expectations for hands-on experience at each grade level			 
Establish board governing procedures	 		
Revise old standard operating procedures (SOPs) and develop new ones		 	
Develop a new scheduling and elective selection process		 	
Create a leadership succession plan		 	
Design and implement a robust performance evaluation process			 



Next Steps

Through these Findings and Recommendations, GROW has laid the foundation for the ECS Board to take the next steps in shaping the strategic direction of the school. However, these recommendations are not the 5-Year Strategic Plan. They are a **framework** to begin the process of developing the 5-Year Strategic Plan. The following are the next steps needed to reach that plan:



1: Action Plan Creation: Develop a detailed action plan for each recommendation that the ECS Board believes should be included in the 5-year plan. Include responsible parties, implementation timelines, and required resources.



2: Finalize the 5-Year Plan: Finalize the 5-Year strategic plan, incorporating all revisions and refinements developed in the Action Plan.



3: Publish, Communication and Rollout: Develop a communication plan to inform all stakeholders about the strategic plan and its goals. Clearly communicate the plan's expectations, benefits, and how each stakeholder can contribute.



4: Monitoring and Evaluation: Establish regular checkpoints to monitor the progress of the plan's implementation. Define key performance indicators (KPIs) to measure the plan's success.



Appendix



SWOT Analysis

Strengths

- **Signature events:** Notable and unique events that contribute to the school's identity.
- **Continuity of leadership:** Consistent and effective leadership that provides stability.
- **Flexibility and adaptability:** Ability to pivot and adjust to changing circumstances.
- **Reputation:** Strong and positive perception within the community.
- **High engagement:** Actively involves students, parents, and staff in school activities.
- **Well-designed facilities:** Adequate space and attractive buildings that enhance the learning environment.
- **Diverse elective variety:** Offers a wide range of elective courses to cater to diverse interests.
- **Vibrant school spirit:** Promotes a sense of unity and enthusiasm among students and staff.
- **Inclusivity:** Embraces diversity and ensures all students feel welcome and valued.
- **Community support:** Receives robust backing from the local community.
- **Success-oriented:** Driven by clear goals and achievements.
- **Academic excellence:** Consistently achieves top rankings in state academic performance.
- **Fine arts mission:** Dedicated to nurturing students' artistic talents.
- **Effective Board governance:** Governed by a proficient and strategic Board.
- **Positive environment:** Fosters a culture where students and staff feel valued.
- **Convenient location:** Situated in a desirable and easily accessible area.
- **Strong safety procedures:** Implements effective measures to ensure student safety.
- **High teacher retention:** Attracts and retains skilled and dedicated educators.
- **Enrichment programs:** Offers diverse enrichment classes beyond the standard curriculum.
- **Alumni engagement:** Maintains a connection with former students, benefiting the current community.
- **Sustainability practices:** Engages in sustainable initiatives, such as gardening and eco-friendly practices.
- **Parent involvement:** Actively involves parents through programs like PAWS.
- **Strong brand recognition:** Possesses a recognizable and respected brand within the region.
- **Student pride:** Fosters a sense of pride and belonging among students.
- **Preparation for higher education:** Successfully prepares students for further academic pursuits.
- **Hands-on activities:** Provides interactive and practical learning experiences.
- **Inclusive sports:** Offers inclusive sports programs that cater to various skill levels.



SWOT Analysis

Weaknesses

- **Ineffective On-boarding:** Lack of on-boarding process for new Board members and families.
- **Communication Gaps:** Uncertainties and gaps in communication between staff and teachers, leading to unclear expectations.
- **Faculty Role Alignment:** Difficulty aligning staff strengths with suitable roles
- **Organizational Ambiguity:** Lack of clear organizational structure and role delineation.
- **Compensation Plateau:** Concerns arising due to a compensation plateau, particularly among long-serving faculty.
- **Resource Constraints:** Limited resources hampering effective implementation of EC programs, MTSS, and differentiation strategies.
- **Elective Availability:** Limited availability of elective choices coupled with potential scheduling issues.
- **Foreign Language Curriculum Gap:** Inadequate development of foreign language curriculum.
- **Facility Rental Management:** Difficulty in efficiently managing facility rentals.
- **Data-Driven Scheduling Challenges:** Challenges in adapting schedule to reflect data insights.
- **Morale Impacting Policies:** Policies with demoralizing effects negatively affecting staff morale.
- **Weak Stakeholder Connections:** Limited connections between the Board, staff, and PAWS, affecting collaboration.
- **Ineffective Evaluation Process:** Inadequate evaluation processes with insufficient feedback mechanisms.
- **Absence of SOPs:** Lack of standardized operating procedures impacting operational consistency.
- **Operational Gaps:** Gaps in operational coverage and resource allocation.
- **Technology Support Shortcomings:** Insufficient technology support for both staff and students.
- **FP&A Deficiency:** Inadequate financial planning and analysis practices affecting resource management.



SWOT Analysis

Opportunities

- **Facility Utilization:** Maximizing rental potential for theater, gym, and fields, while exploring uses for outdoor spaces, gardens, and outdoor classrooms. Further development of available land.
- **Technology Integration:** Leveraging in-classroom technology for student engagement and curriculum enhancement. Adopting emerging technologies for teachers to increase efficiency and effectiveness.
- **Effective Personnel Placement:** Ensuring the right people are in suitable roles, enhancing overall organizational performance.
- **Time Management and Planning:** Enhancing time management and planning for improved operational efficiency.
- **Enriching Extracurriculars:** Developing and expanding extracurricular activities, clubs, and after-school programs.
- **Procedural Streamlining:** Developing comprehensive procedures and plans to eliminate redundancy and streamline operations.
- **Elevating Fine Arts and Electives:** Elevating the role of fine arts and electives in the core curriculum.
- **Enhanced Educational Technology:** Introducing educational technology to foster more interactive classroom discussions, increasing social and emotional learning opportunities.
- **Engagement with Wake Forest Community:** Tapping into the growing Wake Forest community for collaboration and mutual benefit.
- **Effective Communication:** Enhancing communication channels for better engagement between teachers, staff, and families.
- **Central Resource Hub:** Establishing a centralized resource hub for convenient access to relevant information.
- **Salary Schedule Improvement:** Working towards closing the salary gap with the state to retain and attract quality staff.
- **Alumni Engagement:** Tracking and sharing alumni success stories to create a sense of pride and connection.
- **Embracing Diversity:** Attractive diverse talent and students, promoting diversity and fostering an inclusive environment.



SWOT Analysis

Threats

- **Legislative Funding:** Uncertain or inadequate funding from legislative sources affecting budget planning and execution.
- **DPI Curriculum Changes:** Potential changes in the NC Department of Public Instruction (NCDPI) curriculum that may impact instructional strategies and goals.
- **Succession Issues:** Concerns related to smooth transition in leadership positions and maintaining institutional knowledge.
- **Competition from New Charter Schools:** Competition from newly established charter schools in the area can affect student enrollment and resources.
- **Safety Concerns:** Ensuring the safety and security of students and staff in various scenarios as well as keeping up to date with the latest safety procedures and expectations.
- **Capital Blvd. Expansion/Eminent Domain:** Potential disruption due to road expansions or eminent domain cases affecting school property.
- **Financial Planning and Analysis (FP&A) Challenges:** Difficulties in effectively managing financial planning and analysis, impacting resource allocation. Possible liabilities resulting from volunteers working on FP&A.
- **Teacher Retention and Quality:** Retaining quality teachers amidst competition and external opportunities.
- **Exposure to lawsuits:** Exposure to legal challenges resulting from serving a larger student body and community.
- **Lack of Policies and Procedures to address legal issues:** Insufficient policies and procedures to mitigate legal risks, ensure compliance, and safeguard the school's reputation and financial stability.
- **Funding for Retirement Contributions and Facilities Issues:** Potential budget constraints affecting retirement contributions and facility maintenance.
- **Drop in Fundraising:** Decreased community support leading to reduced fundraising efforts.
- **Diversity Issues:** Challenges in promoting diversity and maintaining an inclusive environment.



Vision

In action

- **Community:** The community exhibits active involvement through lunch duty and parent ambassadors, along with strong family financial support. The Parent Association (PAWS) organizes events and an art show, while corporate and community sponsors contribute. Community service is emphasized through a Day of Service, while spirit days, themed museums, and special celebrations foster engagement. Carpooling, participation in events, and field trips are integral, and the library's establishment was a collaborative effort via the Fund Run initiative. In kindergarten, classroom roles like line leader and door holder enhance student engagement.
- **Impact:** The school's impact is evident in the strong teacher-student relationships, the motivating influence of the National Jr. Honor Society, and its esteemed community reputation. The theater program not only holds potential for future income generation but also fosters confidence and life skills. The school offers a diverse array of opportunities that contribute to well-rounded growth and development.
- **Multi-faceted:** The school's approach is multi-faceted, encompassing a diverse fine arts curriculum, Middle school social media lessons, and PAWS-supported activities including speakers, performances, and cultural sessions. Teachers enjoy curriculum delivery autonomy, and an inclusive sports program promotes diversity. Additionally, staff members embrace dual roles, reflecting the school's comprehensive and varied educational landscape.
- **Student:** The students experience an inclusive and supportive atmosphere daily, participating in classroom activities. This environment is fostered by teachers and staff to create a positive and nurturing learning setting.
- The students actively participate in sports and various school activities daily, both within and off campus during sporting events. This engagement is driven by a strong sense of school spirit.



Mission

In action

- **Challenging:** Students are chosen from class for targeted math and reading sessions, including both advanced and remedial levels, conducted outside the classroom by dedicated teachers for 1-2 days per week. The goal is to meet students at their individual skill levels, optimizing learning outcomes.
- Math pathways leading to the Math 2 course in 8th grade were introduced last year, and this year marks the inaugural offering of Math 2. The course is conducted in regular classes, reflecting a response to substantial parental demand and student interest.
- The program offers a diverse array of enrichment and elective classes, providing one daily class, each available once per semester. Students can select two electives every semester in middle school due to the availability of a single enrichment teacher per subject.
- **Engage:** Examples of engagement at the school include an end-of-year celebration, various extracurricular opportunities such as performances, fall fest, and fun runs that extend beyond classroom instruction. Middle school demonstrates engagement through programs like Jr. Honor Society, PEPI, and student council. During the pandemic, the 1st-grade team organized engaging story time activities, while the 4th-grade science class participated in a memorable elephant snot experiment, showcasing controlled chaos in action.
- **Familial:** The school nurtures a familial environment through events like the Fun Run and the annual Fall Festival, as well as involving families in activities such as lunch duty and daily sharing of students' experiences. These efforts take place on campus and are aimed at fostering strong family engagement within the school community.
- fostering a familial atmosphere, the school's fine arts program brings together students, parents, and staff through events like grade-level performances and an annual art show held in the campus gym. These gatherings, occurring once a year, serve as a platform to celebrate and showcase student talents, strengthening the sense of family within the school community.
- **Hands-on:** The school emphasizes hands-on experiences through field trips, elective requirements involving play skits and performances, and dedicated staff involvement. This approach enhances the overall learning experience and its value, providing students with an amplified educational journey. Additionally, it creates opportunities for increased community investment and awareness, extending the impact beyond the school's boundaries.

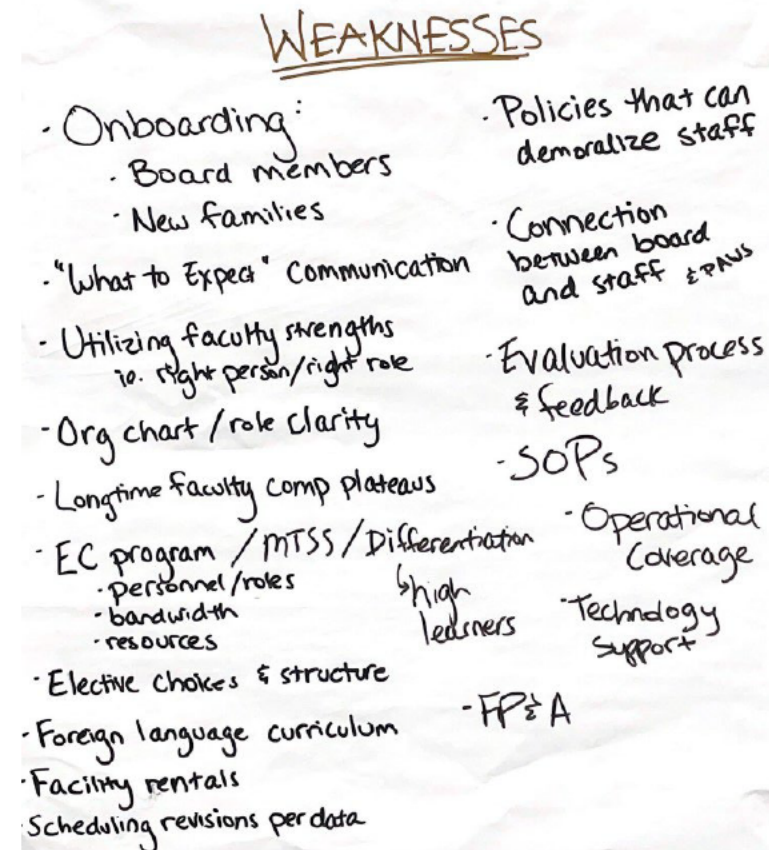


Vision Statement



Appendix A: SWOT Analysis

Strengths & Weaknesses



Appendix B: SWOT Analysis

Opportunities

OPPORTUNITIES

- facility-
 - rentals of theater, gym, fields
 - outdoor areas - garden, outdoor classrooms?
 - rest of land - what's next?
- technology-
 - in classroom - student usage w/ curriculum
 - emerging tech for teacher usage to increase efficiency/effectiveness
- the right people in the right chairs doing the right jobs
 - efficient use of time/planning
- extracurricular activities - clubs, after school
- procedures - plans in place so we don't have to reinvent the wheel every time
- fine arts/electives - more core role in Curriculum
- educational technology - enable teachers + students to spend more classroom time exploring, discussing, interacting
 - increase social/emotional learning
- Wake Forest as a growing community - how can we tap into that more
- Communication - better engagement for communicating
 - Teacher → teacher
 - Staff → teacher
 - Teacher → Families
- One-Stop Resource Shop
- Salary Schedule → close the gap
- Alumni engagement - track alumni success stories
- Diversity



Appendix C: SWOT Analysis

Threats

THREATS

- legislative funding
- DPI Curriculum changes
- Succession issues
- new competitive charter schools
- safety
- Capital Blvd expansion/
eminent domain
- FP + A
- teacher retention/quality
- lawsuits
 - lack of policies + procedures
- General funding
 - retirement contributions
 - facilities issues
 - drop in fundraising
- Diversity

