



PARTHENON

Advising the Nebraska State Board of Education in Developing a Strategic Plan for Education

Parthenon-EY Presentation to the SBOE

December 3, 2015



Agenda

Introductions **(5 min)**

Presentation (30 min)

Q&A (15 min)

Introductions

Parthenon-EY Attendees



Tammy Battaglino Tammy is a Senior Managing Director with Parthenon-EY. She co-founded and co-leads the firm's Global Education Practice. Tammy has deep public sector education experience. She has led engagements across early childhood education and K-12 sectors, with states, dozens of districts, non-profit agencies and national, regional, state and local philanthropic organizations. These engagements have included complex strategic planning and stakeholder engagement, development of multiple pathways to graduation, and school finance reform.



Kasia Lundy Kasia is a Managing Director with Parthenon-EY and a leader in the firm's Education Practice. Her K12 education experience includes a wide range of engagements with state education agencies, school districts, philanthropic organizations, and other non-profit organizations supporting K12 education. These engagements have included strategic and business planning, financial resource allocation, organizational effectiveness, and initiative effectiveness analysis.

Agenda

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Presentation (30 min)

Q&A (15 min)

Presentation Topics

In our presentation, we will address the following topics raised by the SBOE:

1 Why Parthenon-EY

Why we believe our firm is the best choice for Nebraska

2 Key Success Factors

What, in our experience, could impact a successful outcome

3 Project Approach

Goals, process, activities, and timeline

**4 Stakeholder
Engagement**

How the board members and NDE staff members will be involved

5 Consulting Team

Key personnel we will assign to the project and their roles

6 Sustaining Progress

How we might sustain the work after the initial project

Presentation

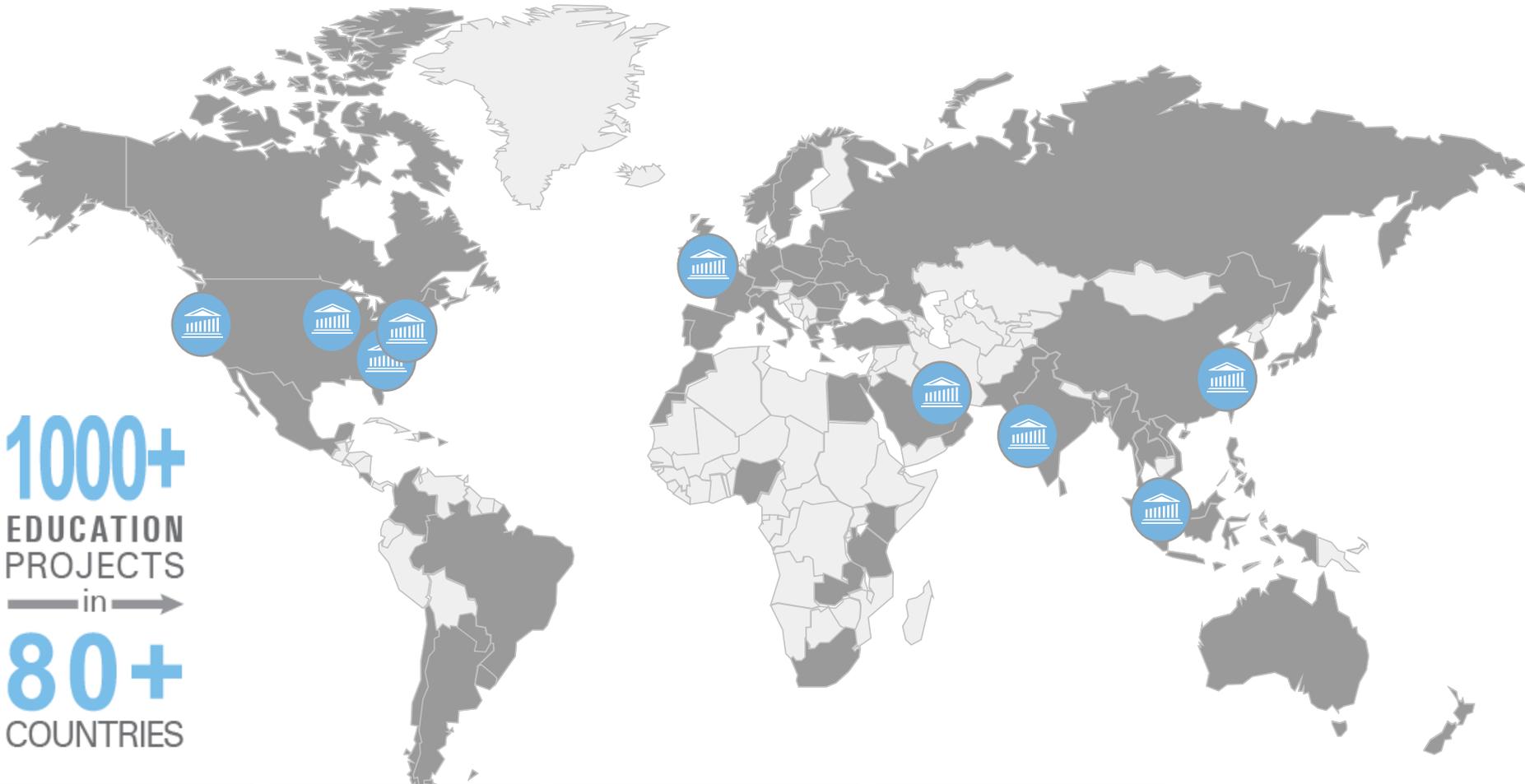
Why Parthenon-EY: Deep education experience



Major Parthenon-EY offices



Education projects completed by Parthenon-EY



Pre-Kindergarten

K-12

Career and
Professional

University

Vocational
and Other

Presentation

Why Parthenon-EY: Wide range of education clients

We advise leading education entities...

- Federal, state, and local educational authorities
- Private K-12 schools, school networks, and other innovative education providers
- Post-secondary institutions
- Foundations on the forefront of education reform

...work with the organizations that help meet their needs...

- Educational publishing
- Testing and assessments
- Tutoring
- Intervention
- Special education
- Technology providers
- Consumer education products

...and study innovations happening all over the world

- North America
- Latin America
- Europe
- Gulf Cooperative Countries
- Africa
- Asia, Southeast Asia, and Asia-Pacific

Presentation

Why Parthenon-EY: Deep and relevant experience with strategic planning

1 With State Education Agencies

Examples include: Delaware, Florida, Georgia

2 With School Districts

Examples include: Chicago Public Schools, Knox County Schools, Memphis City Schools/ Shelby County Schools, and New York City

3 With Philanthropic Organizations

Examples include: Range of national foundations, Nashville Public Education Fund, Rodel Foundation of Delaware

4 With Grantees / Non-Profit Organizations

Over 100 engagements

Examples include: Council of the Great City Schools, Southern Regional Education Board

Presentation

Key Success Factors

1

Encouraging ownership and buy-in from the start

Our most successful strategic planning efforts with organizations focus on engaging key stakeholders early and often across the organization (e.g., policymakers, board members, staff, practitioners, business and philanthropic community)

2

Leveraging knowledge you already have

While we recognize that targeted external diagnostic efforts can be effective, the best opportunities for improvement can be readily identified through the common knowledge of the community

3

Providing compelling data to enable rapid alignment

We take a fact based approach to help mitigate potential differences in opinion among a diverse stakeholder community and work to draw connections between the data and recommendations

4

Establishing a clear vision and new responsibilities

We work with you to assess what could change and how the change can happen so that all stakeholders can better understand their roles and begin to take steps to expedite the implementation effort, with clear accountability

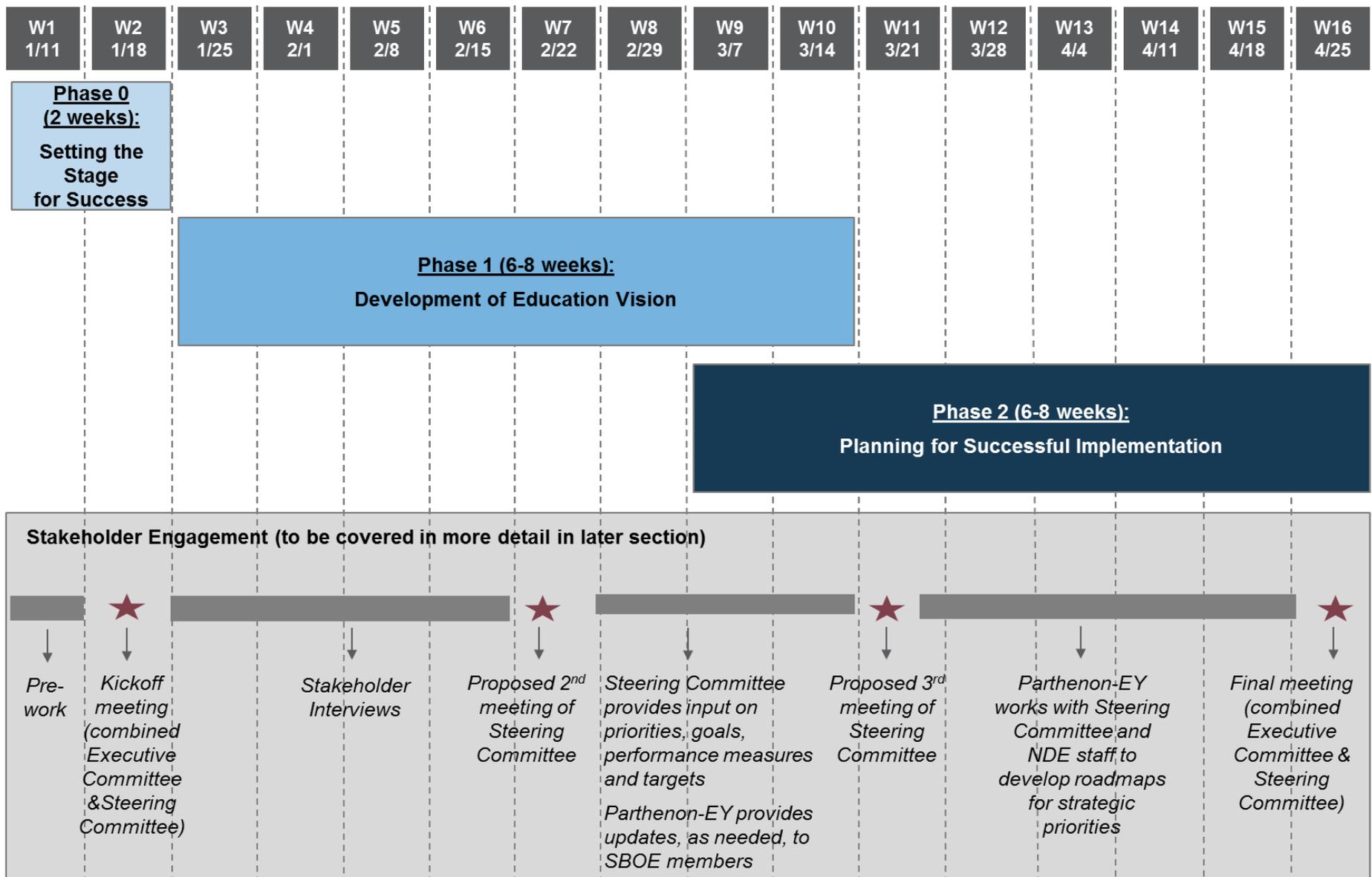
5

Building capability along the way

We recommend expectations for enhancing and maintaining change capability within the organization intended to get past the initial assessment results, set the stage for “making the change real” and identify champions to drive further adoption of change in the future

Presentation

Project Approach: Overall timeline



Presentation

Project Approach: Goals and activities in each phase

| Phase 0 (2 weeks) | Phase 1 (6-8 weeks) | Phase 2 (6-8 weeks) |
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| Setting the Stage | Development of Education Vision | Planning for Implementation |
| Goal: Finalize project plan and set the project up for success | Goal: Assess alignment among key stakeholders vision, goals, strategies intended to achieve goals, and progress measures | Goal: Assist the SBOE and NDE in recommending a roadmap for implementing the strategic vision |
| Key Activities: <ul style="list-style-type: none">• Finalize project governance and management structure• Finalize list of stakeholders to engage and schedule interviews• Identify relevant data and documentation to collect, launch data request, and collect data• Hold kick-off meeting with the Executive Committee and Steering Committee to develop preliminary hypotheses to evaluate in stakeholders interviews | Key Activities: <ul style="list-style-type: none">• Conduct stakeholder interviews• Assess a set of key baseline information and data that recognizes Nebraska’s education system efforts to date• Facilitate process to develop shared vision for education among the SBOE, NDE, and state education system (steering Committee meetings, outreach back to stakeholders, updates to SBOE members)• Advise management in drafting vision, priorities, goals, strategies, and measures | Key Activities: <ul style="list-style-type: none">• Hold targeted sessions with NDE leaders and staff to understand what initiatives are underway and how they are progressing• Leveraging work already done by NDE, identify inventory of key initiatives and align them to specific goals. Identify any critical gaps that may need to be addressed• Establish the “critical path” of initiatives for the first 18-24 months• Recommend high-level organizational and financial requirements to begin plan implementation over next 18-24 months |

Presentation

Project Approach: Deliverables by phase

| Phase 0 (2 weeks) | Phase 1 (6-8 weeks) | Phase 2 (6-8 weeks) |
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| Setting the Stage | Development of Education Vision | Planning for Implementation |
| <p>Deliverables:</p> <ul style="list-style-type: none">• Recommended project governance and management structure• Recommended stakeholder engagement plan• Recommended meeting schedule (Executive Committee, Steering Committee, etc.)• Initial data (org structure, budget breakout, current initiative inventory) collected• Interview guides finalized• Stakeholder interviews scheduled | <p>Deliverables:</p> <ul style="list-style-type: none">• Synthesis of interviews at the theme level• “State of education in Nebraska” factbase, to serve as a baseline for evaluating progress• Recommended shared vision for the SBOE, NDE, and state education system that leverages and aligns prior plans, identifies key priorities and goals, as well as indicators and measures of success | <p>Deliverables:</p> <ul style="list-style-type: none">• Recommended implementation roadmap for next 18-24 months, including key operational milestones and potential high-level organizational and financial considerations |

Overall Deliverable:

- Recommended strategic plan and key targets to achieve, with roadmap for next 18-24 months
- *NOTE: We assume that Parthenon-EY will assist in developing key messages, but that the SBOE and NDE will leverage own communications staff (or external PR firm) to create the externally-facing plan*

Presentation

Stakeholder Engagement: Project governance is an important element of engagement

DRAFT only – for discussion

Executive Committee (3-4)

E.g., 2 SBOE representatives and 2 NDE representatives

Steering Committee/Working Group (10-12)

Representatives of key functional areas within NDE, and potentially outside representatives as well (e.g., members of the external community)

Project Coordinator

TBD: Designated by Executive Committee

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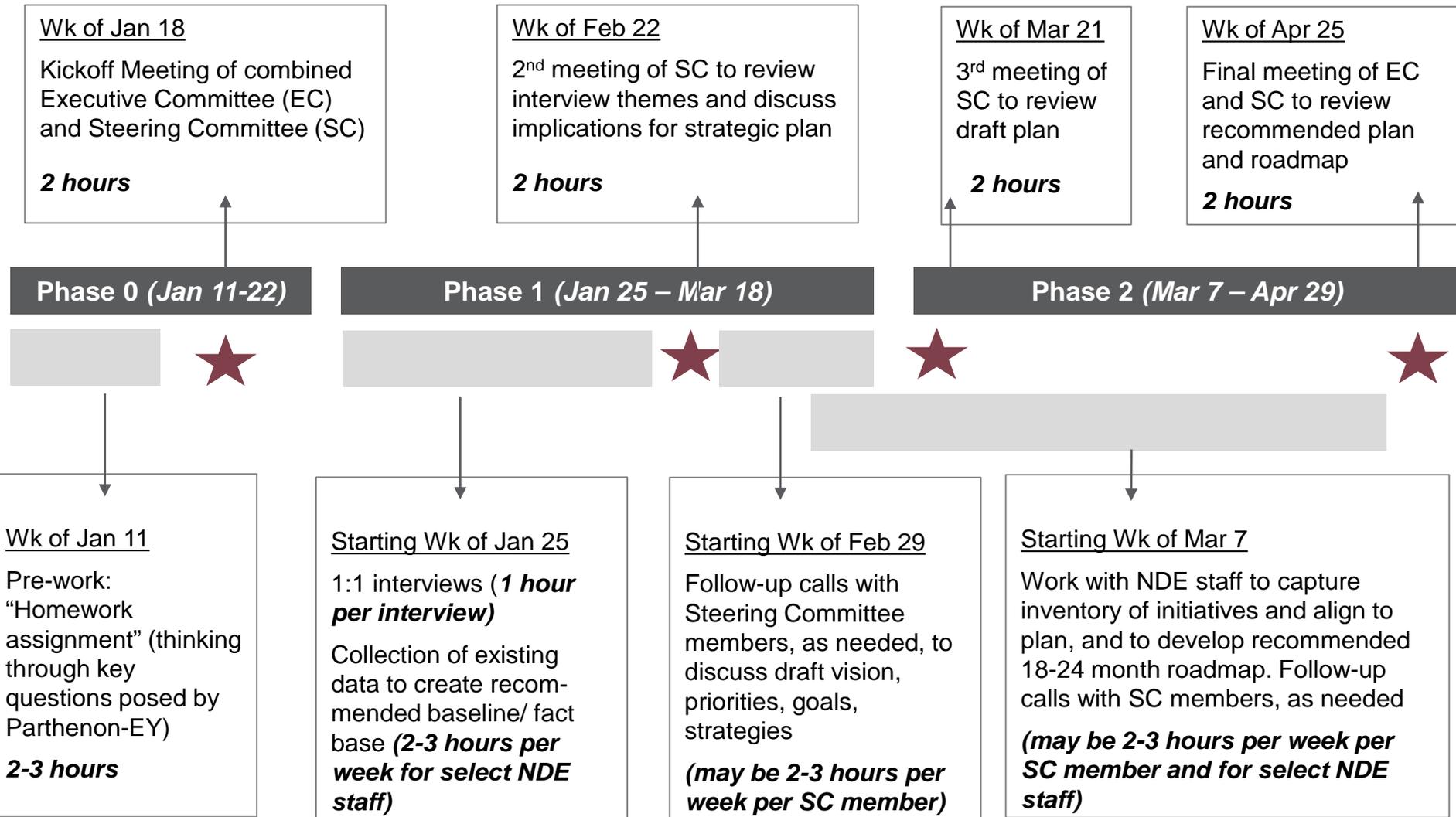
Stakeholder Engagement: Key groups we expect to engage (~ 40 interviews)

| Education Governance (~ 20) | | Broader Community (~ 20) * | |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| State Board of Education Members (8) | <ul style="list-style-type: none"> Representation on the Executive Committee All will participate in 1:1 interviews Updates provided to SBOE members not sitting on the Executive Committee—by NDE staff / Parthenon-EY—as needed/desired by the SBOE | Governor’s Office and Legislature | <ul style="list-style-type: none"> Selected individuals (2-4 interviews) |
| | NDE Leadership and Staff (10-12) | <ul style="list-style-type: none"> Select NDE leadership/staff are on the Executive Committee, on the Steering Committee, and participate in 1:1 interviews (10-12) In Phase 2, Parthenon-EY may conduct additional sessions/interviews with NDE staff and will also rely on work conducted by NDE staff to align key initiatives to priorities | PreK-12 Education Practitioners |
| Higher Education Community | | | <ul style="list-style-type: none"> Selected leaders (3-5 interviews) |
| Philanthropic & Business Community | | | <ul style="list-style-type: none"> Selected individuals (3-5 interviews) |
| Other (TBD) | | | <ul style="list-style-type: none"> For discussion (3-5 interviews) |

* During Phase 0, it will be critical to map out the stakeholder engagement process in more detail to make sure that we are engaging with the right people at the right time with the right goals. While it will not be possible to engage everyone in a 14-week process, there will be a longer term engagement strategy recommendation (e.g., keeping people informed of key recommendations and of progress)

Presentation

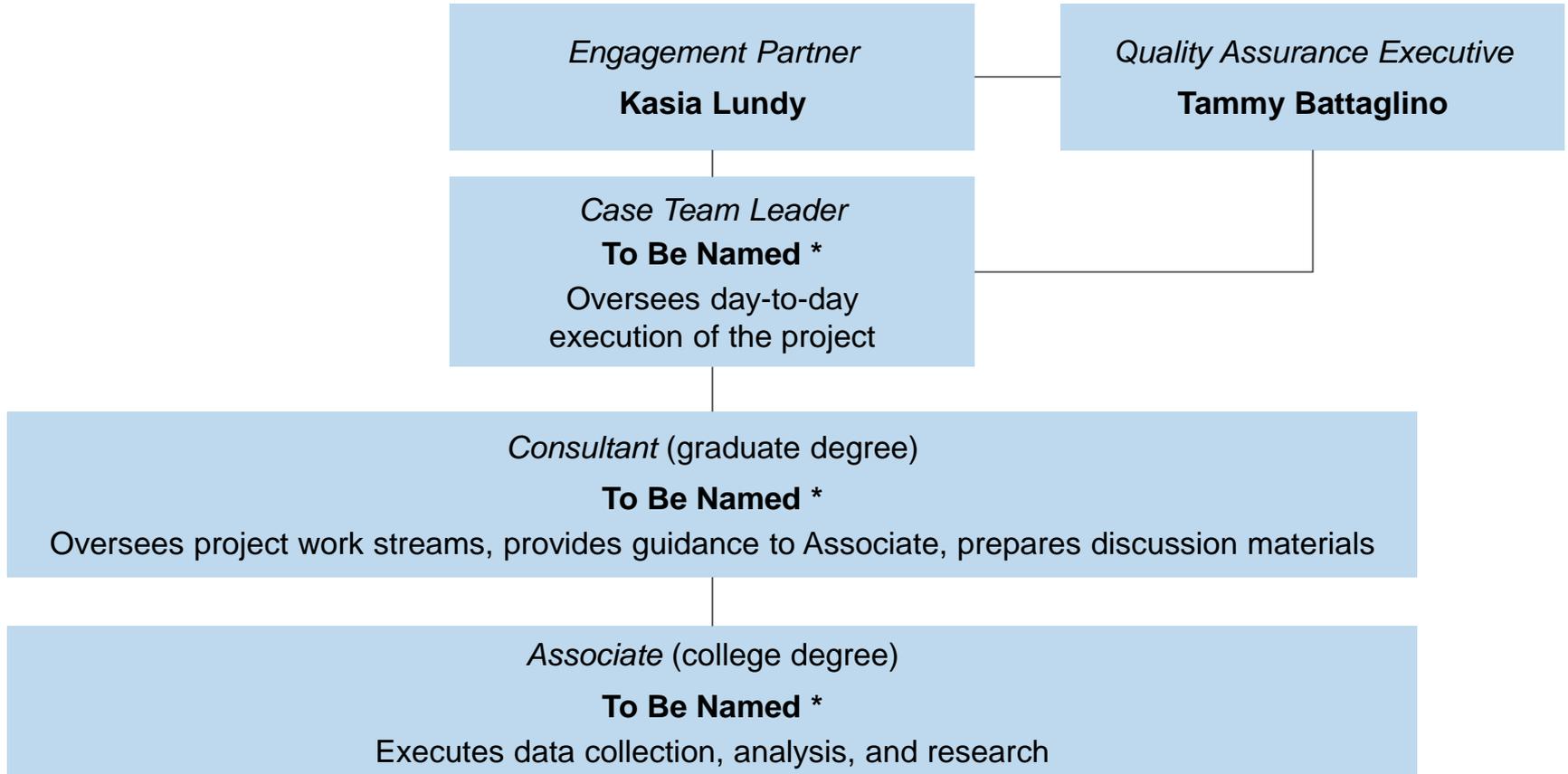
Stakeholder Engagement: Anticipated participation of SBOE members and NDE staff *



* In addition: Weekly progress check-ins (30-60 min) with Project Coordinator; and update meetings with Commissioner and SBOE members as needed (frequency to be agreed upon in Phase 0)

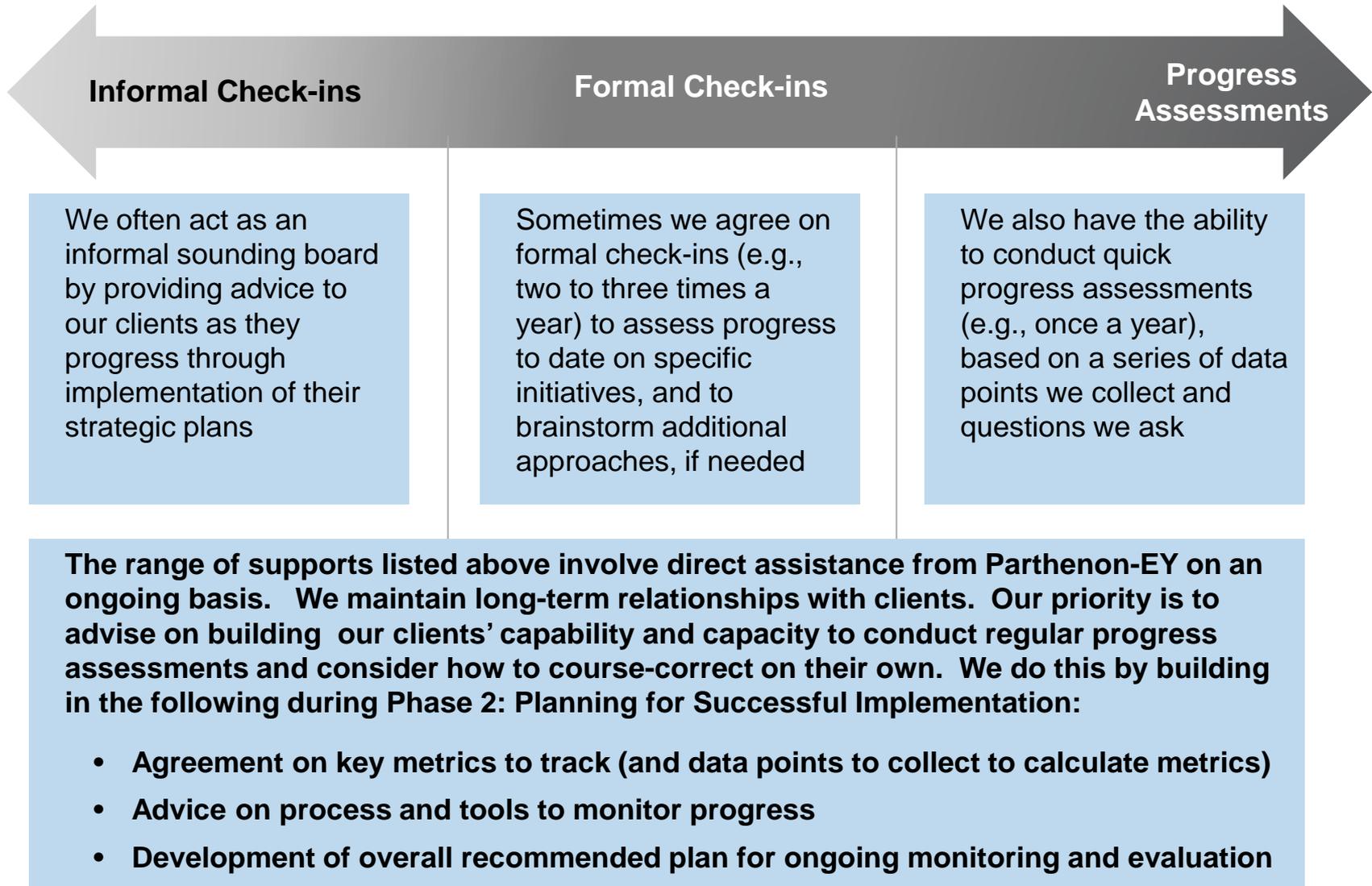
Presentation

Parthenon-EY Team: Roles



** Given that the project start date has not yet been set and the nature of the consulting business is somewhat unpredictable, we cannot at this time commit to specific names at the Case Team Leader, Consultant and Associate level. We provide sample bios in our original proposal (pages 13-17) We can, however, say that we will select these roles from among the staff dedicated to our Education Practice in a way that fits the needs of the project and the skillset of our staff*

Considerations on Sustaining Progress : Keeping the strategic plan current and relevant over time



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