

January 28, 2010

Dear CEO Candidate,

Enclosed is the grant proposal for Teaching First. It is a confidential document; please do not share it.

As you read through the document, please be aware of the following:

- The grant was approved by the Bill & Melinda Gates Foundation last year, and the budget numbers have been removed.
- The grant proposal was written in August 2009, and the education landscape has changed dramatically since then. Most notably, there is a deep and growing awareness of the importance of teacher effectiveness. Whoever assumes the role of CEO of Teaching First will have to engage these trends and use them to mobilize the public around the issue of teacher effectiveness.
- Since this grant was approved, the Bill & Melinda Gates Foundation has selected four Intensive Partnership for Effective Teaching sites and announced that it will invest \$335 million to support their efforts to improve teacher effectiveness. To learn more about the Intensive Partnership initiative, please visit the Foundation's website: <http://bit.ly/bIYilq>

Thank you for your interest in Teaching First.

Amy Wilkins – Search Chair

Amy Wilkins is an experienced political and community organizer with a special skill in media communications. Amy oversees the Trust's media, data, government affairs and coalition work. She has sharpened her skills in advocacy over years of successful work for the Children's Defense Fund, the Democratic National Committee, the Peace Corps, and the White House Office of Media Affairs, among others.

John Deasy, Deputy Director of Education for the Bill & Melinda Gates Foundation

John leads the programmatic work on effective teaching. Prior to joining the foundation, he served as superintendent of the Prince George's County, Maryland, Public Schools, where he earned a national reputation for his leadership in significantly narrowing the achievement gap between low-income and minority students and their peers. During his time in Prince George's, John also launched a pay-for-performance plan that was approved by the Board of Education and developed jointly with labor, making the district a leader nationally in efforts to reward teachers for gains in student achievement. Previously, he served as superintendent of the Santa Monica-Malibu Unified School District in California and of the Coventry Public Schools in Rhode Island. In all three districts, he championed rigorous and ambitious learning opportunities for youth, fair teacher and administrator evaluations, pay-for-performance, staff development and training, and data-based decision-making. John brings nearly three decades of extensive successful experience in education to the foundation. He has been a Broad Fellow, an Annenberg Fellow, a State Superintendent of the Year, a presenter at numerous state and national conferences, and a consultant to school districts undertaking high school reform and district-wide improvement strategies. He has spoken and written extensively on education and serves on numerous boards.

Sandra Licon Special Assistant to the Director of Education,
US Program, Bill & Melinda Gates Foundation

In this role, Sandra develops grants and advocacy strategies to support the scaling and sustainability of the Foundation's education efforts focused on ensuring all students graduate from high school ready for college, work, and life.

She oversees a grant portfolio focused on developing partnerships with key stakeholders on issues critical to student success including development of common national standards, developing data and accountability systems to improve student and school outcomes, and expanding access to effective teaching for low income and students of color.

Prior to assuming this position, she was selected as a Congressional Hispanic Caucus Fellow where she worked at the Education Trust and later with Senator Edward Kennedy's staff on the Senate Health, Education, Labor, and Pensions Committee on K-12 school improvement and developing legislative proposals focused on secondary school reform.

Sandra started her career as an elementary school teacher in South Central Los Angeles, where she worked for four years with students and parents to improve academic outcomes. Following her classroom experience, she worked as a Program Director with Teach for America developing a program of ongoing support and professional learning for beginning teachers in Lynwood and Long Beach Unified School Districts. She holds a Master's degree in Administration, Planning, and Social Policy from the Harvard Graduate School of Education and Bachelor's in Foreign Service from Georgetown University.

Teaching First
a project of Rockefeller Philanthropy Advisors
Proposal ID: AP585
July 2009
(Revised August 21, 2009)

I. Proposal Overview

Teaching First will inform, encourage, and support change efforts in local communities where the Bill & Melinda Gates Foundation plans to make intensive partnership grants to districts seeking to improve teacher effectiveness and ensure that low-income and minority students are taught by highly effective teachers. By leveraging a range of tools and tactics, Teaching First will build community awareness, public demand, and political will to ensure that all students are taught by an effective teacher in every subject, every year:

- Through independent research/data analysis/policy development, Teaching First will furnish information and ideas that engage the public in understanding the case for reform and the new policies that are most likely to improve outcomes in public education.
- Through local outreach and grassroots organizing, as well as through subgrants and/or contracts with local leaders and organizations, Teaching First will mobilize local activists to demand greater action on the teacher effectiveness agenda.
- Teaching First also will commission professional help to craft messages that appeal to the general public's desire for education reform and communications strategies that build support among all stakeholders while minimizing the political push-back that has accompanied previous efforts to focus on teacher effectiveness. Finally, Teaching First will serve as a source of information for local journalists in the intensive engagement media markets, and will serve as a conduit for national leaders to encourage and support local reform efforts.

II. Project Description

In part because of a collective failure to understand and utilize information on teacher effectiveness, American public education has made only modest gains in educational achievement over the last decade. Moving forward, more dramatic improvements in public education are essential to a stronger and more cohesive democracy, to grow our economy and sustain our standard of living, and to maintain our position of leadership in the world. Improving teacher effectiveness and ensuring that poor and minority students are taught by highly effective teachers are critically important to success.

The Gates Foundation has decided to develop significant partnerships in a few, selected districts in an attempt to "break the code" on teacher effectiveness. These multi-year partnerships will focus on all aspects of the human capital pipeline with the goal of increasing the number of effective teachers teaching low-income students and students of color.

There are many challenging substantive issues to address in crafting smarter policies and practices regarding teacher effectiveness, but even the best-laid plans will be insufficient to achieve the desired changes in public education unless they are bolstered by outside support. To affect change on the scale that is required will demand public and political will beyond what the districts themselves can generate even if district leaders wholeheartedly support the reform agenda. Moving to a system that measures and strategically uses information about teacher and principal effectiveness will require a new political alignment on a range of hot-button issues. To succeed, districts will need an external "critical friend" (or friends) to build demand for reform; even districts with stable leadership and broad buy-in will need outside support to sustain progress over time.

This grant will support the creation of a new organization, Teaching First, to play the role described above. While much of Teaching First's public presence will be through local activities in the intensive partnership districts, a central staff will lead the work and bring national perspective and expertise to bear on each local campaign. Teaching First will become a trusted source of information on issues related to teacher effectiveness and equity in each community and help local organizations develop their own credibility on these issues. It will build an extensive network of influential contacts inside the district and in the wider community, engaging local stakeholders to speak out publicly on the agenda of improving teacher effectiveness and ensuring that poor and minority students have their share of the best teachers. It will build strong relationships with local community groups, leveraging reciprocal assistance and sub-grants to build a base of committed activists willing to lend their time and voices to advocate for change. And it will bolster those voices by establishing strong ties to local journalists, opinion elites, and local/state policymakers and their staffs to ensure widespread attention on, and media coverage of, the teacher effectiveness and equity agenda.

Teaching First Activities

Each intensive partnership site will need a coordinated campaign to bolster the efforts of the school district, provide pressure to stiffen policymakers' resolve when the inevitable pushback mounts, and to engage broader constituencies in supporting and, ultimately, demanding an aggressive reform agenda. While each district will have its own specific context and personalities that need to be navigated with local expertise, there is a core of work that cuts across the districts and can most successfully be done by a national office. This will allow some efficiencies in identifying and profiling best practice in the field and in descriptions of the problems and needs for solutions, the honing of effective messages for different audiences, and the rapid application of lessons learned to new contexts.

Teaching First cannot be seen as too aligned or coordinated with district leaders or union officials or it will lose its ability to play the outside role. Ideally, Teaching First's advocacy will move the middle of the conversation closer to reform and create a new space for district leaders and policymakers to implement reforms that previously would have been seen as too ambitious.

1. Research and Data Analysis/Policy Development

Implementation of an aggressive human capital agenda is fighting against some ingrained understandings that weaken the public's resolve: First, Americans think public education systems generally are about as fair and efficient as they can be. As a corollary, there is a deep-seated belief that outcomes are about as good as can be expected given the difficulties that students in urban districts face outside of schools. Many would-be supporters still need to be convinced there is a problem that needs to be addressed.

In each district, the public needs a portrait of unequal opportunity to motivate the desire for change. The discussion of unequal access to the best teachers will take slightly different form in each district, to support the specific reform agenda being pursued and to take advantage of the available data sources in that district and state. But the overarching metrics and analyses of teacher and teaching quality should be developed by Teaching First. This will allow expert staff to canvass the country for innovative ways to characterize teacher quality and distribution (building on work by Education Trust, the Center for Reinventing Public Education, and others), and will allow for strong quality control and message discipline to be applied.

Just as important, the public needs to understand how profoundly important great teachers are in helping disadvantaged students attain the heights of their potential. Teaching First will need to share research on the impact of highly effective teachers and seek out ways to identify and celebrate such teachers in its work.

Making the case that reform is needed is only half the battle. Educators, parents, and policymakers will only maintain support for difficult changes if they can see a path to better outcomes through changed policies (including changes to existing contract provisions, which set policy within the districts). One critically important role of Teaching First will be to analyze the current policy framework and apply knowledge of research and best practice from across the country to advocate for specific changes.

Teaching First can play an active role in creating the conditions for success by identifying roadblocks to reform and making the public case for their removal. Some of the policy limiters already have been articulated, such as seniority rules and salary cost averaging budget rules. Others will be specific to each district and state. Ohio, for example, essentially requires a single salary schedule by law, which makes alternative compensation systems more difficult to negotiate.

Although national organizations like TNTP and NCTQ can provide critical expertise on these issues, Teaching First will need a strong policy and research staff capable of parsing the complicated tangle of local policies and labor contracts to pinpoint specific provisions inhibiting reform. Teaching First also should look at the broader policy frame affecting the agenda: In some locations, funding levels and fiscal equity may be important issues to draw attention to. In other places, certification rules and licensure requirements may construct unhelpful barriers to recruiting strong new teachers. Many of the districts will be struggling with inadequate assessment systems, where public education on the value of high-quality assessment and data systems could help.

Even reform-minded superintendents have kept the public shut-out of contract negotiations, which has allowed counter-productive compromises to go without scrutiny. One goal of Teaching First should be to ensure that the public has a seat at the table when contracts are renegotiated and to ensure that contracts get fully vetted by reform advocates. This terrain involves technical language and the intersection of many laws and regulations, and Teaching First will need assistance to be able to go toe-to-toe with union spokespeople on understanding and explaining the impact of various provisions to lay audiences.

Teaching First also can serve as a clearinghouse for the most effective policy provisions, giving each of the districts access to national expertise and best practice. By following the national research and advocacy, and through close relationships with organizations like the New

Teacher Project, Harvard Education Innovation Laboratory, and CALDER, Teaching First can help inform important local conversations.

Finally, working closely with the Communications Director and communications consultants, Teaching First's policy team will produce basic but high-impact advocacy materials that can assist with earned media and grassroots communications, including fact sheets and one- or two-page issue briefs. Such publications can have multiple benefits: They will offer a quick way for Teaching First to establish its bona fides on teacher effectiveness issues; help convince local stakeholders to buy in to the agenda; be packaged as "take aways" to hand community group leaders, journalists, or opinion leaders after initial meetings; enhance the capacity of community advocates to communicate about these issues; be provided to journalists in conjunction with story pitches; and provide quick and easily accessible fodder for drafting opinion pieces or other documents.

2. Cultivating Allies and Mobilizing the Grassroots

To persevere with an ambitious reform agenda on teacher effectiveness will demand a new politics in education reform. In each district, Teaching First will mount organizing campaigns to enlist supportive teachers, parents, policymakers, and opinion elites to both pressure and support the district to stay the course.

It is likely that the scale of the resources and notoriety that will come to the districts selected by the Foundation for intensive partnerships will buy some support at the beginning; indeed, part of the selection design seeks assurances of buy-in from educators and policymakers. For many participants, however, the commitment will be shallow and there will be a tendency to wear the cloak of reform while preserving as much of the status quo as possible. The pushback will come soon after the tough issues arise, and it will be fierce.

Because of the required intensity and site-specific nature of these efforts, Teaching First will need dedicated staff for each of the intensive partnership sites. It may be possible to hire and coordinate this staff through an intermediary that has expertise in grass roots organizing, such as Stand for Children. But one way or another, Teaching First will need "boots on the ground" in every intensive partnership district—people who understand the lay of the land and can forge connections that will matter in that particular locale.

Teaching First should be planning one or more campaigns to ensure that the reform agenda can create a positive message and stay on the offensive as opposed to merely reacting to opposition. Key stakeholders are much more likely to maintain support if they have bought into a new vision for improving public education and closing the achievement gap. Whether it's elevating the status of the teaching profession or ensuring young people's right to an effective teacher or another hook, Teaching First should plan on supporting local leaders in articulating and advocating a positive, proactive agenda from the outset. For example, Stand for Children organized parents and community activists to successfully demand reforms in teacher hiring and assignments in Portland, Oregon in 2008. Stand for Children analyzed the issues, engaged civic and community leaders in shaping an agenda and a campaign to change policy, and worked with policymakers to turn the reform agenda into new rules. Similarly, although on a smaller scale, the Boston Plan for Excellence identified barriers to reform efforts in teacher assignment/bumping rules in the Boston teacher contract, and mounted a successful public campaign, along with a grassroots organization called Voices for Children, to get the rules changed in the 2000 contract negotiations between the district and the union. Both of these are examples that Teaching First can emulate.

In addition, it may be important for local Teaching First staff to support and participate in campaigns that only are tangentially related to the teacher effectiveness agenda in order to build trust among allies and strengthen the coalition. Buying a table at the neighborhood association's annual fundraiser might not directly advance the teacher effectiveness agenda, but it can be an important part of participating in local capacity- and coalition-building.

Two important lessons can be gleaned from the Education Trust-West's organizing around the A-G agenda in Los Angeles and other, similar campaigns:

First, organizing on education reform cannot be done remotely. Issues involving public schools are inherently sensitive politically because these institutions are so valued in their communities. Convincing local advocates to support an aggressive reform agenda demands real-time support and reinforcement. Local advocates will get pressure to support more modest reforms, especially from the unions and their allies; they also will get messages about the dangers and negative consequences of "too much" reform. Without constant support and consistent information to counter the attacks, local advocates will recede to the more traditional, more comfortable role of supporting the status quo, or close to it.

One way that Teaching First can support the local work and build capacity is by bringing local advocates together from across all the selected sites for intensive "institute" experiences. This will allow Teaching First to get local advocates together with some of the best minds in education reform/teacher effectiveness, as well as organizing and communications. One or more of these institutes could be structured as "learning journeys" where local advocates can see first-hand some of the best practices in the areas for which they will need to advocate, and be able to ask questions of practitioners and advocates from those communities that will strengthen their work in their own districts.

Second, money matters in these contexts. Local community organizations are strapped for cash and often work on the priorities of local social service agencies because these are the entities with funding. Oftentimes, these agencies and their programs are administered by public-sector union members, who traditionally have been wary of their grantees' focusing too much attention on education reform. In other communities, organizations have received direct support from the teachers unions; even if these dollar amounts are minimal, these are significant relationships for the community organizations. Community based organizations are much more likely to pick up the reform agenda and stick with it if they can support staff through this work and if they are able to forego other sources of funding.

Money for staff is the first priority, but a slightly larger budget for sub-grants to community organizations can go a long way. Providing resources for these organizations to rent busses for crowd-building, to print flyers and leaflets, and to offer refreshments at their events can make their campaigns more effective. Moreover, providing some resources or direct support to document the work of community groups can galvanize attention and help build the movement. Through You Tube and other web-based ways of sharing videos, community advocates can take a larger stage and inspire younger activists to get involved.

There are several logical targets for Teaching First organizing:

- The **parent community** is in some ways the sleeping giant of education reform politics – they are a huge political constituency, they have the most direct stake in education improvement and care deeply about their children, and parents are quick to make the connection between education and broader life opportunities. The parent community is,

of course, not monolithic, and Teaching First will need to be very sensitive that its messages to some parents don't create unnecessary tensions with other parts of the parent community. This is a particular challenge in addressing the equity issues; privileged parents will naturally fight to protect those privileges if they feel threatened. Teaching First should not and cannot shy away from the equity issues – they are at the center of Teaching First's mission, but Teaching First also should not create unnecessary opponents. It will be important to think of the ways in which Teaching First's agenda benefits the entire metropolitan area and not to create a zero-sum context in outreach and messaging to parents.

- To connect with parents from across the district, Teaching First will research and reach out to the organizations with whom parents already are involved. **Community based organizations and faith communities** are potential allies in organizing parents to support reform. To foster authentic community involvement, Teaching First should seek out genuine, grass roots neighborhood organizations that exist in virtually every community and that have their finger on the pulse of their direct communities. Teaching First will get a head start on that work by benefiting from a local "power analysis" currently being conducted by Stand for Children to inform the Foundation's process for selecting intensive partnership districts. In addition, Teaching First organizing team should be seeking out individuals who are local leaders and who, even if unaffiliated, can help sway local opinions.
- **Classroom teachers** also are a key organizing target for Teaching First. Opinion research documents that many teachers want to embrace the reform agenda being pursued in the intensive partnership districts, but lack a trusted alternative to the union position. There is a generational divide that should be exploited by Teaching First: many young teachers, especially those recruited through alternative certification programs (e.g., TFA, TNTP), are more willing to try new arrangements and have less loyalty to the unions and the traditional bargains. The Teaching First needs to work with partners to create a vehicle for these teachers to have a public voice in the debate. Past experience suggests teachers are highly reticent to "go it alone" in these conversations, especially when the union and established interests are lining up in opposition. Teaching First will canvass the country for innovative ways of raising the voice of supportive teachers in the reform debate (e.g., reach out to TEACH-PLUS in Boston).
- There are some potential allies that have not been effectively marshaled in the national conversation but who could play an important role in some of the deep dive districts. **Leaders of trade unions and other unions (especially SEIU)** have been tepidly supportive of the reform agenda and Teaching First should seek them out for early participation and potential support. **Ecumenical leaders** have been solicitously courted by the national teachers unions and other status quo organizations, and they have played a small role in undermining national reform efforts, especially in the context of NCLB. Recruiting some local religious leaders to champion this cause locally would lend important credibility on the equity issues, and might have salutary implications for the national conversation. The Southern Christian Leadership Conference has flirted with the idea of working on education reform issues and should be approached early on in Teaching First; SCLC could be very helpful in organizing ministers to speak out on these issues.

- **Students;** No one has more at stake, or understands the teacher effectiveness issues better. Teaching First should engage youth organizing experts to determine ways in which students could take a more active role in advocating for the teacher effectiveness agenda.

There are two other important and related groups whose work Teaching First will need to inform and inspire: policymakers and opinion elites. **Policymakers at the local and state level** (e.g., school board members, mayors, city council members, legislators, and governors) will need to revise current policies that present obstacles to district plans for promoting teacher effectiveness and distributing effective teachers equitably; ultimately, they will need to adopt new policies that can sustain local initiatives over the long term. Part of this focus is defensive, because policymakers are going to need some comfort that the reform agenda is worth all the pain it will inevitably bring. Finally, **opinion elites** are an important constituency, in part because the pendulum can swing against reform if we lose the grass tops. College presidents, prominent business executives and local chamber of commerce leaders, and other civic leaders will be recruited as boosters and champions. National educational leaders and celebrities, and opportunities to collaborate with them, could be particularly important in appealing to local leaders. Depending on the local circumstances, more of this work might be done by local partners or by Teaching First staff directly.

3. *Communications*

Reshaping the conversation regarding the cultivation and management of human capital in public education is vitally important to the success of the intensive partnership districts.

Many constituencies will be asked to confront difficult issues and to stick with the reform agenda through controversies that have derailed previous efforts. Constructing messages and communications campaigns that remind the participants and the public of what's at stake and inspiring urgency and resolve in tackling the tough issues will be required. Teaching First will need to craft messages that help situate the intensive partnership reforms as elevating the profession, drawing on best practice in other endeavors, and essential to success in public education.

With professional assistance from one or more communications firms, Teaching First will commission public opinion research and focus groups to hone a set of core messages that can be customized to each district's context. Teaching First will have the benefit of prior research commissioned by the Foundation, so will have a bit of a head-start and can begin its work in those areas that still need more research and refinement. For example, advocates need very specific advice on which arguments resonate with teachers and which with parents, etc. What will convince voters to no longer tolerate the "last hired, first fired" rules? What will convince teachers it's unsound educationally and bad for their profession? (What is envisioned is akin to the kind of campaign memos that advise candidates on the words and phrases that have been field-tested to resonate with voters and those words/phrases that turn off people.) Through distribution of materials and regular meetings/conference calls, Teaching First can monitor what's working in the field and help other cities get the benefit of prior experience with rapid response to emerging controversies.

By engaging professional consultants with expertise in political communications, Teaching First should be able to assist local advocates in adopting messages and specific language that builds public support, and avoid language that unnecessarily turns off potential supporters. (It is

unlikely that "strategic management of human capital" will inspire political activism among parents.)

One of the most challenging aspects of communicating about the human capital agenda is that the public has a very difficult time distinguishing between fairness to adults and fairness to students. President Obama has shown a willingness to speak directly to this issue, telling Americans there is no excuse for allowing ineffective teachers to stay in the classroom – that the stakes are too high for our students and our country. To go along with the tough messages, Teaching First will need to develop positive messages about the important contributions of our best teachers, the availability of supports and second-chances for struggling teachers, and will need to reiterate the fundamental importance of education improvement and the key role of better human capital policies in the process.

Teaching First will need capacity to generate advocacy materials for district-level advocates. Teaching First will ghost-write op-eds, letters to the editor, and help develop longer pieces for local magazines. In addition, Teaching First should be able to call on national leaders from education and politics as well as celebrities who are willing to lend their voice to the cause either through published pieces or to participate in-person when the situation arises (i.e., rallies, legislative hearings, etc.).

Teaching First also will maintain strong working relationships with local education reporters, opinion writers, and bloggers where that is an active community. Teaching First should put significant effort into these relationships because local interest groups resistant to change also will be providing the media with information, and reporters generally won't have the time or the inclination to spend much time exploring counter-narratives. Especially because of its capacity to analyze local data and policies, Teaching First can make itself a valuable source for local education journalists and should be able to connect reporters with credible local voices as well as national validators for the reform agenda. The goal of Teaching First should be to serve as an honest broker of information and a trusted, often off-the-record source for local reporting.

In addition to traditional earned media opportunities, Teaching First should budget for two types of paid media. First, Teaching First should get professional assistance in pitching to talk radio shows, which have the ability to reach large segments of the general public, and with deeper treatments than typically found in most news stories. Second, Teaching First should have a budget for billboards, bus and newspaper ads, and other mass media communications to break out certain issues for public scrutiny – or to celebrate especially significant progress.

Teaching First Structure

A new organization, Teaching First, is proposed to undertake the activities described above. There is a tremendous amount of ongoing work Teaching First will be able to draw upon in its work, but there is not an existing organization with the capacity and the focus that will be required.

Teaching First will be led by a CEO, a COO, and three directors. Since Teaching First is a new entity being launched entirely for the purpose of supporting the project described in this proposal, Teaching First's staff members will focus exclusively on this project, as reflected in the FTE percentages in the budget. The three directors each will lead one area of work described above: research/policy development, outreach and organizing, and communications.

The COO position is particularly important to Teaching First because of the diffuse nature of the proposed activities—substantive work in 3-5 cities right from the launch of the organization and a reliance on multiple consultants and contractors to advance the work quickly in the first two years. The COO will manage these relationships, as well as the logistical and legal challenges of getting a new organization up-and-running, which will allow the CEO to focus more attention on strategy, key staffing decisions, and overall execution of Teaching First's agenda.

Teaching First will operate as a special project of Rockefeller Philanthropy Advisors (RPA). RPA is a nonprofit 501(c)(3) public charity that helps donors to create thoughtful and effective philanthropy throughout the world. As part of its mission, RPA provides fiscal sponsorship services for nonprofit initiatives seeking support from private foundations, government agencies, and individual or corporate donors. RPA establishes and manages such a sponsor relationship through the creation of a special project.

A special project provides a mechanism for receiving contributions from one or many sources and for disbursing related program expenses and/or grants relevant to the project's charitable purposes. It is a unique entity that holds several strategic advantages for an initiative such as Teaching First including:

1. A cost effective alternative to creating a separate 501(c)(3) organization;
2. A flexible entity to incubate a charitable initiative in the short-term, and can, if needed, efficiently transfer the assets to an independent 501(c)(3);
3. A partner with deep donor networks and a shared vision of public education reform;
4. A partner with proven success working with the Gates Foundation as a fiscal sponsor for Strong American Schools and the Campaign for High School Equity.

RPA will provide the following services to Teaching First, including but not limited to:

- Nonprofit 501(c)(3) status for Teaching First;
- Established charitable vehicle for U.S. donors and other funders;
- Banking relationship for deposits and payments;
- Deductibility acknowledgement letters for donors;
- Investment management, administration and fiscal oversight;
- Regular monthly budget reports on funds received and disbursed;
- HR services including payroll and benefits management for full-time staff;
- Execution of contracts for services and related program expenses;
- Access to legal counsel, as needed
- Due diligence and risk assessment for sub-grants and program-related expenses to ensure that they meet standards for charitable purpose;
- Preparation of grant agreements;
- Maintenance of all files and records.

As the fiscal sponsor, RPA is legally responsible for the activities carried out by Teaching First. By law, RPA must have complete discretion and control over all activities, property, contracts, commitments, and distributions related to Teaching First. The Board of Directors of RPA has final approval of any and all activities. However, when the staff of Teaching First is ready to establish a separate, legally recognized charitable organization, RPA will transfer all property to the new entity. Currently, the plan is to enable Teaching First to establish status as an independent 501(c)(3) organization within one year and six months of its launch, a goal

reflected in the 18-month project budget. (Please see the attached "Special Project Guidelines" for a comprehensive outline of RPA's policies and procedures.)

III. Strategy Alignment

The Foundation is making a significant investment in key "intensive partnership districts" with the goal of increasing teacher effectiveness in these districts and creating proof points for future work. Teaching First will complement this work by providing political cover to those who are pursuing the teacher effectiveness agenda and helping to build demand for these reforms.

It's important to distinguish between the short-term and long-term significance of creating Teaching First. In the short-term, Teaching First can be valuable in providing "cover" and support as the districts embark on an ambitious reform agenda. Having an entity with the perspective and purpose of translating some of the complicated data and research into more parent-friendly materials, and who will make the case publicly for the importance of the teacher-effectiveness agenda, will create a better climate for the reforms.

The most important contribution, however, is in creating long-term sustainability for the teacher effectiveness agenda. While the partnership support will create a lot of buy-in among the initial participants, there will come a time when these districts, unions, and communities will need to persevere and extend the reforms without foundation support. For that to happen, the public is going to need to demand these kind of reforms, and that won't happen unless there are groups whose mission is to keep parents, policymakers, and other public stakeholders informed and engaged in the process. Teaching First can play a vitally important role in building understanding of how we grow public engagement in the teacher effectiveness agenda.

IV. Implementation and Results

The ultimate goal of Teaching First is to ensure that intensive partnership efforts are successful in improving teacher effectiveness and increasing the assignment of highly effective teachers to low-income students and students of color. Teaching First's role will be to build public and political will to pursue this agenda.

The first priority will be to build an organization: find a CEO/director, assemble a group of advisors and consultants to get the work up and running as quickly as possible, and build a staff of national experts and local leaders.

It is expected that once the CEO and the COO are on-board, they will have several sets of immediate responsibilities. First, they will need to hire a team of permanent staff for Teaching First. The CEO will need to identify consultants and advisors who can get started with some of the back-office work even before a full staff is in place. For example, extant data on teacher quality, effectiveness, and distribution in each of the participating locales can be analyzed and summaries developed for future use. Likewise, the message development can get underway with assistance from a public relations/research firm, even before a vice president for communications is hired. As the work progresses, the CEO will need to decide what work needs to be done by Teaching First staff and what work is most efficiently and productively completed by consultants/contractors. At the same time, the COO will need to begin raising the additional funding necessary in to meet the budget for the project, along with hiring a development director who can assist in the effort.

The most significant grant outcomes in the first two years of Teaching First will be:

1. Establish Teaching First as a new entity with sufficient capacity to succeed in its mission and to spin off as an independent 501(c)(3) organization within 18 months.
2. High credibility as a trusted source of information on issues related to teacher effectiveness and equitable access to effective teaching in each of the intensive partnership districts, and/or the enablement of local organization(s) to play the role of trusted expert in each locale.
3. Negotiated subgrants, contracts, or partnerships with local organizations and community leaders who are willing to speak out publicly on the agenda of improving teacher effectiveness and ensuring that poor and minority students have their share of the best teachers.
4. An extensive contact list of parents; teachers; students; community activists; and business, civic, and religious leaders who have expressed an interest in improving public education.
5. Strong ties to local journalists, opinion elites, and local/state policymakers and their staffs, and frequent placement (for Teaching First or, ideally, local/national partners) in local media coverage of issues related to teacher effectiveness and equitable distribution of effective teachers.
6. A lead or supporting role in at least one local campaign in each intensive partnership locale. (Campaign may be focused directly on demonstrating public support for teacher effectiveness agenda, may focus on policy or political obstacles to teacher effectiveness agenda, or may focus on a local priority that is only indirectly related to teacher effectiveness agenda, e.g. funding equity, to build a base of committed activists who can grow into strong supporters of the intensive partnership work.)
7. An independent voice (i.e., independent of district- or union-based stakeholders) to participate in the public debates on improving teacher effectiveness, with a particular focus on advancing the work undertaken through the intensive partnerships.
8. A compelling set of messages (phrases, key words, concepts, etc.) for use by Teaching First and local advocates to communicate about the need for teacher effectiveness and equitable distribution of effective teachers and to advocate for policies to achieve those aims.

V. Organizational Capacity

Teaching First is being created to fill a particular need. While it does not yet exist, Teaching First will start with some strong advantages because of its incubation by the Foundation. Teaching First will be able to draw on a national network of grassroots organizers, researchers, policy wonks, and communications specialists to inform the design and implementation of its activities.

To achieve its mission, Teaching First will need significant assistance from a communications firm with a strong track record in strategic communications, public opinion campaigns, coalition building, crisis management, and grassroots advocacy. Through a rigorous RFP process, Teaching First will secure a contract with a firm (or firms) that can develop and implement an aligned communications strategy that includes message development and refinement; strategies for equipping local district and community allies with powerful messages; assistance with local earned media; and ways to identify strong local communications firms to assist the effort. The ability to craft powerful new ways of talking about this agenda that avoid the kind of miscommunications that have derailed such efforts in the past will be critical for sustaining forward momentum in these local communities.

Teaching First also intends to empanel a Board of Advisors composed of national and local leaders. This advisory board will transition into a governing board once 501(c)(3) status is

granted. As described in the last section, one important function of this board is to evaluate whether the strategies and activities are successful, and to suggest mid-course corrections as needed. Please refer to Appendix B of this proposal for a tentative list of potential candidates for the Teaching First advisory board.

Finally, because Teaching First must begin its on-the-ground work in intensive partnership districts as soon as they are announced by the Foundation, the CEO and COO will work to build the organization's staff as quickly as possible. The goal will be to fill the director level positions by mid to late October and to have most of the remaining positions filled by late November or early December. This is an ambitious hiring timeline for a new organization, but necessary given the anticipated timing of the Foundation's announcement of intensive partnership grants. Despite the accelerated timeline, Teaching First will secure experienced, talented, and highly capable individuals for each position through intensive recruitment and selection. Through their deep expertise and extensive connections, Teaching First's advisory board members will provide critical support for the CEO's and COO's efforts to recruit top talent on an accelerated timeline.

VII. Risks

The risks related to Teaching First's proposed activities are mentioned in the narrative. The most significant risk is that Teaching First will not engage and enlist the right local advocates to move the teacher effectiveness agenda forward. This could happen because Teaching First has misread the local political landscape or because the most helpful local leaders cannot be recruited. As part of its due diligence in the site selection process, the Foundation has commissioned a local power analysis by Stand for Children which also will help to mitigate the risk for Teaching First. Once the right people and groups are identified, Teaching First will rise or fall on its ability to convince them to support the teacher effectiveness agenda, which will be a combination of: (1) the quality of its ideas, (2) the sensitivity to local concerns reflected in the supporting materials and (3) the strength of the local representative and his/her ability to identify and take advantage of local interests in supporting the agenda.

An additional risk, also mentioned in the narrative, is that Teaching First will create a negative reaction among privileged parents. This could take multiple forms, including an urban/suburban divide within some districts, or a dynamic of gifted & talented vs. struggling students. Teaching First will need to be sensitive to this potential and craft outreach strategies and messages that articulate the broader benefits to the entire metropolitan areas; for example, better educated young people allow for the growth of jobs in high-skill, high-wage sectors, and diminish reliance on public support. In addition, there may be ways of ensuring that all sectors *within* the district see the partnership/teacher effectiveness work as a positive; while this could conceivably exacerbate urban district vs. suburban district tension, this problem may be easier to manage than *intra-district* tension of winners and losers.

Another risk is that Teaching First will be characterized as a tool of the Foundation and/or motivated by a political agenda other than improving public education. These risks must be met by earnest efforts to elevate the voices of local leaders (including seeking local financial support) and by focusing the conversation on substance. Teaching First will need to be very careful about the national partners it brings into the work, with a focus on serving as a resource to local advocate/activists. One way Teaching First can minimize the likelihood of being tagged as an outsider is to maintain a low public profile and to ensure publicity and credit accrue to

local partners whenever possible. The advisory board also can play an important role in signaling the seriousness, independence, and public-interest purpose of Teaching First.

Finally, Teaching First also will face operational risks. While it will benefit from expert advice on specific issues from various organizations and experts, Teaching First will need to invent new ways to combine and leverage policy research, communications strategy, and grassroots organizing to advance similarly ambitious local initiatives in separate locales around the country—and do so on a very accelerated timeline. That would be a daunting challenge for any organization, let alone a small start-up. At the same time, Teaching First will need to work very quickly to secure significant additional funding necessary to support its mission, and it also will need to develop and implement a plan to spin off as an independent 501(c)(3) within 18 months. While the development director and COO can handle much of the work related to fundraising and establishment as a separate entity, the CEO will need to be involved in conversations and meetings to some extent (i.e., with potential funders). That combination of immediate, overlapping, and high-stakes demands is perhaps the greatest challenge facing Teaching First in its first year.

VIII. Lessons Learned and Evaluation

Teaching First will use the Goals and Milestones identified in Appendix A to track its success and to make mid-course corrections as necessary. However, because Teaching First is a start-up organization that will need to invent new ways of combining policy, communications, and community organizing to advance the teacher effectiveness agenda in multiple locales, evaluation must be immediate and ongoing, and mid-course corrections will be frequent.

Indeed, the specific Milestones themselves must be understood to reflect only the best thinking about strategy prior to launch. Early lessons learned as the staff digs into the work over the first few months might reveal that different or additional strategies and activities will be necessary to achieve the mission, and developing the ability to revise and refine the milestones accordingly will be an important milestone in and of itself. Simply put, Teaching First simply will not be successful unless it has both the capacity and the freedom to think and act very flexibly and strategically as it deals with unanticipated obstacles and opportunities in the partnership communities (which, indeed, have not even been identified yet) and as it grows its own expertise for carrying out this important new kind of work. Any new organization taking on such a mission will inevitably make tactical errors; it is by consciously learning from such errors—as well as from early successes—that Teaching First ultimately will triumph.

At the same time, there are some basic milestones we have identified that will be important no matter what and that can serve as guideposts to ensure that the organization is making sufficient, sustained progress in “the basics.” Those basic milestones include press hits about the relevant issues in each locale; a robust and ever-expanding list of self-identified supporters in each community; partnerships or formal agreements (subgrants or contracts) with local community groups; and creation of high-impact and frequently used advocacy materials such as fact sheets, briefs, and best practice case studies.

Moreover, Teaching First will seek informal evaluative feedback from “critical friend” experts on an ongoing basis, most importantly members of its Board of Advisors. Just as students and teachers need regular formative evaluations to improve their performance, this new organization can only learn and grow by seeking expert feedback on its own progress, along with specific recommendations for tweaking strategies and tactics to better achieve the organization’s

mission. Of course, Teaching First also can seek advice from advisory board members and other experts based on its own analysis of performance against the milestones. For example, if in one locale it is taking longer to develop partnerships with local community groups, Teaching First can seek immediate advice on how to identify and overcome the precise barriers (either in its own tactics or in the local community or both) that are slowing down progress in that area.

The "bottom line" is that Teaching First is being created because there currently is no organization in the country with the depth and range of expertise necessary to accomplish this mission. Both the Foundation and the leaders of this new organization should anticipate an early struggle to figure out how to be effective. However, while an expectation of immediate and unqualified success is unrealistic, what we can expect is the kind of intense, focused concentration—including "metacognition" to reflect on progress on an ongoing basis—necessary to build a high level of expertise on an accelerated timeline.