

**Arizona University System
Technology and Research Initiative Fund (TRIF)**

**BEAT THE ODDS Website Initiative:
Implementing the principles and findings
of a ground-breaking report
on success in Arizona schools**

Business Plan

March 2007

EXECUTIVE SUMMARY

“The core problem is that our education and training systems were built for another era.”

Tough Choices OR Tough Times, Commission on the Skills of the American Workforce, National Center on Education and the Economy

The purpose of the BEAT THE ODDS website initiative is to increase opportunities for Arizona educators, school board members, policy makers, business and civic leaders to participate in, contribute to and benefit from the findings and recommendations of the BEAT THE ODDS research study released by the Center for the Future of Arizona in March 2006.

The public response to BEAT THE ODDS was immediate and widespread in Arizona and around the country. Some of the interest is due to the fact that Jim Collins, author of *Good to Great*, served as an advisor to the research study and has spoken publicly about the report as an example of how his leadership principles apply to the social sector. As a result, BEAT THE ODDS joins Southwest Airlines, Starbucks and the Dallas Police Force as Collins’ hand-picked exemplars in a PBS special that aired on KAET on January 10th and 14th and is airing nationally throughout the country in all major metropolitan markets.

In addition to the visibility provided by Collins, BEAT THE ODDS has resonated with people because of the “it can be done” findings of the study and its pragmatic recommendations. The recommendations align well with other studies that are passionately advocating for change in education. In short, the report has helped create a window of opportunity for Arizona to play a leadership role in addressing one of the great challenges of our time.

In the global economy, America no longer enjoys a competitive advantage in education and leaders in all sectors understand the nation’s need to improve student performance at all levels. Arizona is one of the states with the most to gain. As a border state, we have a high population of economically disadvantaged students with limited English-language proficiency. But so do other states that are outperforming us. This proposal is designed to provide the technical infrastructure needed for the level of collaboration and thoughtful action that is required to move forward.

Specifically, the Center for the Future of Arizona (CFA) is launching the BEAT THE ODDS Institute to further disseminate the study and to operationalize its recommendations through the development of specific programs and services. Many of the programs and services will be delivered electronically via the website, and all will be supported by the website in terms of ongoing discussion and dialogue. In addition, the website will provide users with easy access to case studies, directories and links to other organizations actively engaged in education reform – including university faculty whose research/teaching interests support the goals of this initiative.

This proposal seeks \$750,000 over three years to staff and develop a world-class, bilingual website to support the delivery of programs and services throughout the State and beyond. The website will be supported by a network of staff, vendors and partners and will utilize students interested in civic leadership, social entrepreneurship and the use of technology for social change.

TABLE OF CONTENTS

Section 1 – Core Vision/Project Description

1.1 Brief overview of industry/Issue addressed by project	4
1.2 Mission, goals, values and vision of responsible organization	7
1.3 Products or services provided by the project	8
1.4 Positioning	9
1.5 How project will be accomplished	10

Section 2 – Operational Strategies

2.1 Development and Production	
2.1.1 Development status	11
2.1.2 Production process	16
2.1.3 Cost of development	17
2.1.4 Labor requirements	18
2.2 Marketing and Promotion	
2.2.1 Strategies	18
2.2.2 Promotion method	19
2.2.3 Advertising and promotion plans	19
2.3 Project Management	
2.3.1 Organizational description	20
2.3.2 Advisory Boards	20
2.4 Sustainability	
2.4.1 Anticipated funding sources for ongoing support	21
2.4.2 Timing for transitioning away from TRIF support	22

Section 3 – Goals/Metrics/Outcomes

3.1 Specific, Realistic and Measurable Goals	
3.1.1 Return on Investment	22
3.1.2 Knowledge Transfer	22
3.1.3 Industry Outreach	23
3.1.4 Work force contributions	23
3.1.5 Educational outreach	23
3.1.6 Government agency/community outreach	23
3.1.7 Partnerships/collaborations	24
3.2 Timeline for achievement of goals	24
3.3 Early proof of performance	24

Section 4 – Pro Forma Financials

4.1 Funding request: resources and planned expenditures	26
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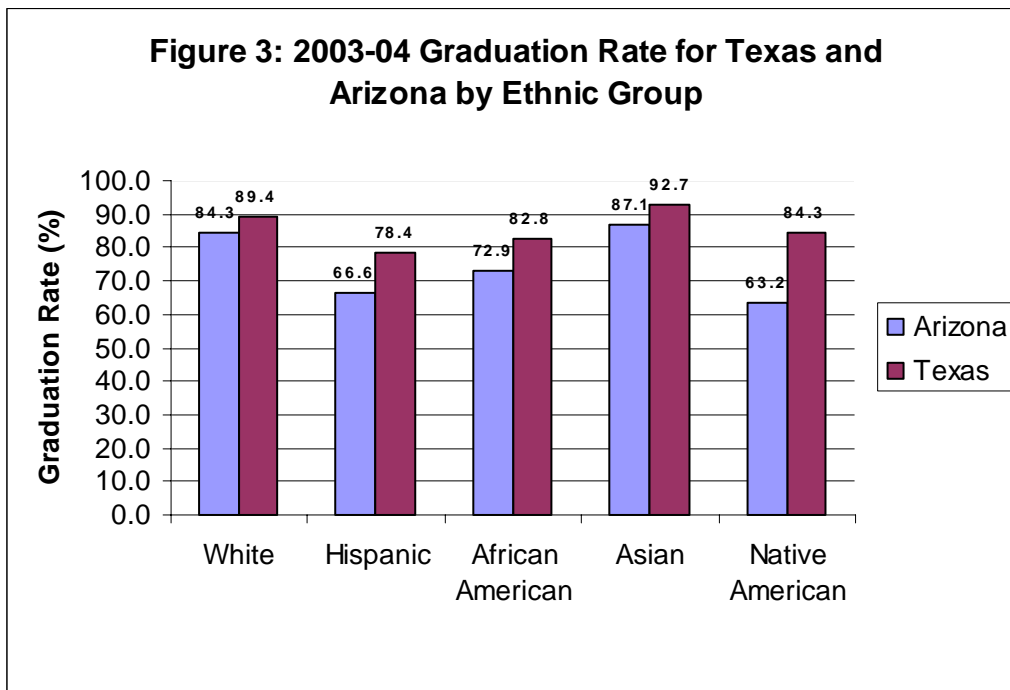
SECTION ONE – CORE VISION/PROJECT DESCRIPTION

1.1 Brief overview of industry/Issue addressed by initiative

If Arizona is going to be prosperous and competitive in the 21st century, it must have an education system and sense of purpose that align with the realities of the global economy.

For more than two decades, Arizona and the nation have been warned of the consequences facing us because of the declining performance of U.S. students at all K-12 levels. We no longer have the most educated workforce among industrial nations – long one of our greatest competitive advantages. Numerous studies document the increasing numbers of educated workers overseas who are willing to work for relatively low wages. At the same time, our proportion of the world’s population of college students has now fallen from 30 percent to 14 percent. Students in other countries are not only getting more education, they are also getting a better education. Among the advanced industrial nations, Americans now place in the bottom half for achievement in mathematics, science and general literacy.

While the challenges are national, the situation in Arizona is especially critical. Arizona students score below the national averages in mathematics, science, reading and writing skills on all benchmarks. Our high school graduation rate is also below the national average – and it cannot be attributed solely to the growing numbers of Latino students in Arizona. *Latino students now account for half of the K-12 enrollment in Phoenix and Tucson schools.* Other border states with similar demographics, notably Texas, continue to outperform Arizona among all ethnic groups.



The result is that far too many Arizona students are entering the workforce without completing high school. Many of our high school graduates are unprepared for higher education and are not completing any post-secondary studies. Thus, their ability to participate in the high tech workforce of the future will be marginal at best.

“Tough Choices or Tough Times,” the newly released report of the new Commission on the Skills of the American Workforce by the National Center on Education and the Economy, echoes what leaders in all sectors are saying with increasing frequency: “The core problem is that our education and training systems were built for another era. We can get where we must go only by changing the system itself.”

While many of the report’s recommendations for change are controversial, few will argue with the hard facts it challenges us to face, including:

- The best and brightest college students are not choosing the teaching profession.
- As a nation, we continue to tolerate individual student failure in the elementary grades when the cost of success is at its lowest.
- The gains achieved by the “standards” movement are modest relative to increases made in per pupil expenditures
- The growing inequality in family incomes is matched by growing disparities in student achievement.
- Our teacher compensation system rewards “time in service” but does not provide incentives to attract the best people to the profession or reward them for success in student achievement.
- The people responsible for student achievement in our schools—teachers and principals—do not have the power; the people who have the power do not have the responsibility.

The Commission concluded that we do not need new programs or even significant amounts of new money to “fix” education in this country. The problem is not with educators but with the system in which they work. Despite the “issue fatigue” that seems to plague discussions about education reform, Arizona must mobilize behind a new goal – aligning our educational system, resources and sense of purpose with the aspirations of our citizens for sustainable prosperity.

This challenge is among the highest concerns of Governor Janet Napolitano and the broad consortium of leaders and organizations supporting the P-20 initiative, including Dr. Lattie Coor and the Center for the Future of Arizona.

The Center for the Future of Arizona was established to improve quality of life for all Arizonans. The first step was identifying a dynamic vision for Arizona with measurable goals that embrace the missions and goals of many organizations, and that leverage the efforts of leaders in all sectors.

- In March 2005, the Center presented its *Vision for Arizona* to the public in a full page announcement in newspapers across the state. The *Vision*, distilled from more than 50 major policy reports and endorsed by more than 70 public and private organizations, provides a framework of issues Arizona must address if we are to achieve the future we

all desire as residents and citizens. **Central to those issues is access to high quality education for all Arizonans.**

- A year later (March 2006), another major step in the visioning process was taken with the release of a groundbreaking study entitled “Why some schools with Latino children BEAT THE ODDS and others don’t.” A joint project of the Center for the Future of Arizona and the ASU Morrison Institute for Public Policy, the study was funded by a collaboration of nonprofit, public, business and academic partners.

With the active involvement of Jim Collins, and using the methodology from his book *Good to Great*, CFA Senior Fellow Mary Jo Waits and the research team found 12 elementary and middle schools in Arizona – schools with mostly Latino, mostly poor students – that are “beating the odds” on reading and math scores. After comparing the higher achieving schools to their lower performing counterparts, the report identified six keys to success with specific recommendations for improving statewide performance.

The Six Keys to Success are:

Disciplined Thought

1. Clear Bottom Line
2. Ongoing Assessment

Disciplined People

3. Strong and Steady Principal
4. Collaborative Solutions

Disciplined Action

5. Stick with the Program
6. Built to Suit

In addition, BEAT THE ODDS made a number of recommendations for change that align clearly with those of the Commission on the Skills of the American Workforce and numerous organizations such as Teach for America, the Pew Center on the States, WestEd and others.

Specifically, the school-based recommendations include:

- Leadership Institute for Principals – The strong and steady principal is one of the keys to success in BEAT THE ODDS schools and we need new training and mentoring models that encourage entrepreneurship and collaborative problem-solving in schools.
- Analyze This – the report emphasizes repeatedly how BEAT THE ODDS schools collect and use data to assess achievement, customize instruction and intervention so it exactly suits each student’s needs. We need new training modules that prepare teachers for data-based decision making in the classroom.
- Case Studies and Best Practices – Principals and teachers often learn about “what works” through word of mouth. We need to facilitate the transfer and sharing of information in relevant and timely ways.

While the report also offers strong recommendations for policy changes in education– drive authority downward to principals, launch a major talent initiative for new teachers, reward

collaboration and success (all issues cited by the Commission in “Tough Choices or Tough Times”) – the BEAT THE ODDS study also concluded that,

“...the magic is within the school itself. Successful schools focus on improving the things they actually can control that will make a big difference in study achievement.”

The response to the study was immediate and widespread. Educators and leaders in all sectors, locally and nationally, have expressed interest in and support of BEAT THE ODDS as a critical tool in addressing the challenges facing K-12 education today. The response has been especially positive among Latino leaders and the report has been translated into Spanish for special distribution to parent organizations.

What is the greatest risk in moving forward? The greatest challenge may well be “issue fatigue” and the level of apathy that results when leaders fail to acknowledge the severity of the issues we face. Quite simply, we cannot afford to accept the current level of student performance if we want Arizona to be prosperous in the future. At the same time, report after report on education performance focuses on all the reasons why we can’t improve, including the notion that we are unfairly handicapped by our border location. By finding 12 Arizona schools that are successfully serving mostly poor, mostly Latino students, BEAT THE ODDS demonstrates that “demography is not destiny.” It challenges us to learn from these schools and to replicate their practices and principles throughout the state.

The best antidote to “issue fatigue” is hope and a renewed sense of purpose based on positive thinking and real success. The overwhelming response to BEAT THE ODDS from all sectors bears out the power of this message.

Given this response, the Center for the Future of Arizona is committed to establishing the **BEAT THE ODDS Institute** to serve as the umbrella organization for all activities designed to disseminate and implement the principles of the report. Note: *Activities to date in launching the Institute are detailed in other sections of the business plan.*

Central to the success of the Institute is the development of a highly interactive, bilingual BEAT THE ODDS Website that offers the same level of sophisticated functionality and customer service that drives all global enterprise today.

1.2 Mission, goals, values and vision of responsible organization

The new Institute will serve as the operational arm of the Center for disseminating and implementing BEAT THE ODDS principles as they relate to both policy and practice in K-12 schools.

Mission: To improve student achievement by working collaboratively with universities, educators, school board members, policy makers, business and civic leaders to implement the principles of BEAT THE ODDS in K-12 schools throughout Arizona and beyond.

Goals: The goals of the Institute are to achieve the following outcomes:

Dissemination

- Significant numbers of educators, school board members, and policy makers at state and federal levels, media, and not-for-profit and business leaders understand BEAT THE ODDS, endorse its findings and join the Center in its commitment to the goal of raising the high school graduation rate for all students.

Note: At the state level, the Governor’s P-20 Council has adopted one of the Center’s core goals – increase the state’s high school graduation rate 12 percent by 2012.

- BEAT THE ODDS principles are:
 - Reflected in Congressional discussions and decisions relative to reauthorization of “No Child Left Behind” in 2007.
 - Embedded in the education platforms of Latino candidates for leadership positions at state and federal levels.
 - Used as a planning framework by significant numbers of K-12 schools and school districts serving mostly poor, mostly Latino students.
- Arizona’s BEAT THE ODDS Institute and its website are frequently cited in state and national media as an expert “voice” for education reform.

Implementation

- BEAT THE ODDS training modules in critical areas (i.e., organizational change management, entrepreneurship and data-based decision making) for principals and teachers are developed and successfully marketed via web-based media.
- BEAT THE ODDS principles are embedded in existing training programs for new school board members, including a certificate-based (for credit) Web-based program developed and marketed by the Institute.
- Certificate-based training for new school board members becomes mandatory in all states.
- A new job description for K-12 principals is collaboratively developed that reflects the skills, attitudes and values identified in BTO as critical to successful leadership in education. The purpose of the new job description is to have long-term impact on:
 - Hiring, promotion and compensation decisions of district superintendents.
 - Recruiting strategies to attract new talent to the profession.
 - Curricula in colleges of education.
 - Evaluation standards used by districts, states and federal agencies.

Developing a highly functional and financially sustainable website that has the capacity to strategically disseminate BEAT THE ODDS, encourage discussion and support thoughtful action and implementation is critical to the work of the Center and its partners.

1.3 Products or services provided by the website project

As envisioned, the website will utilize both “push” and “pull” strategies to provide:

- EXECUTIVE TRAINING: Portfolio of electronic training modules for principals, teachers and new school board members that provide educators with new skills and tools (e.g., managing organizational change, data-based decision making, etc.).

Note: Training will utilize both traditional seminar and electronic delivery strategies,

and all courses will be developed as for-credit courses to meet professional education requirements.

- **MENTORING:** Password-protected sites for professionals to mentor one another and exchange ideas on specific school-based or district-based issues.
- **ELECTRONIC CONFERRING:** Access to outside experts from business, government and the nonprofit community for ongoing problem solving, new tools and models re specific issues. For example, the website could provide regular access to an expert in data management to answer specific questions about the use of data to improve student performance in the classroom.
- **WEBCASTS:** Regular calendar of webcasts that provide educators with opportunities to engage directly with thought leaders in education and public policy – to share current information, discuss new legislation and policy recommendations, and accelerate the process of creating organizational change.
- **STRATEGIC PARTNERSHIPS:** Directories with live links to program partners (e.g., academic, nonprofit, business, government) and funding partners that are strategically aligned with the Institute.
- **LIBRARY/RESOURCE CENTER:** User-submitted electronic library of case studies, best practices, new research and white papers that embody BTO principles and provide practitioners with tangible tools for use in their schools and classrooms. Site will be designed and marketed to promote student/faculty use for research/instruction as well as for education practitioners.
- **ADVOCACY:** Ability to track education legislation at both state and federal levels and participate in surveys and other “brainstorming” activities of both the Center and its partners.
- **MARKETING AND PUBLIC RELATIONS:** Year round calendar of newsletters, surveys, reports and customized communications for segmented target audiences.
- **BUSINESS TRANSACTIONS:** Subscription services, event registrations, online fee payments for training workshops, online giving, receipts and acknowledgements will be automated electronically on the website.
- **BRANDING:** BEAT THE ODDS is emerging as a new brand for the state and the Center for the Future of Arizona. It is critical for the Institute’s financial and political sustainability that research staffs in government, business and the nonprofit sector can locate the Institute online and find compelling information about its goals, programs and services.

1.4 Positioning

The Center for the Future of Arizona is well positioned to take a leadership role in addressing education reform broadly, and in disseminating and implementing BEAT THE ODDS principles in K-12 schools on a grass roots level.

An independent 501(c)3 foundation, the Center is supported by a combination of public and private funds. Established in 2003 as a nonpartisan “do tank” emphasizing action and results, the Center is committed to keeping important issues in public view by bringing focused attention and thoughtful action to the great challenges of our time. The senior

officers of the Center are Dr. Lattie F. Coor, Chairman and CEO, and Dr. Sybil Francis, Executive Director. They have the knowledge, experience and professional relationships to accomplish the goals of this proposal.

Dr. Lattie F. Coor, president emeritus of Arizona State University and the University of Vermont, is an internationally recognized expert in higher education. In addition to 26 years of experience as president of major research institutions, he has held positions on a variety of higher education associations, including serving as chair of the National Association of State Universities and Land Grant Colleges, a director of the American Council on Education, and a commissioner on the Kellogg Commission on the Future of State and Land Grant Colleges. During his tenure as president of Arizona State University, Dr. Coor moved the institution into Research I status, positioning it academically to support the growth of the metropolitan Phoenix community into one of the largest and most dynamic cities in the country. At the same time, he led the first great fundraising campaign for ASU – the Campaign for Leadership, which generated more than \$560 million in private support to the university and created a new culture of philanthropy in Arizona. Dr. Coor is widely respected by all sectors and across the state’s political spectrum as a nonpartisan “senior statesman” and voice for thoughtful action.

Dr. Sybil Francis is a public policy specialist who began her career working in the U.S. House of Representatives where she played a key role in shaping U.S. environmental and national security policy. She later served in the White House Office of Science and Technology Policy where she focused on national research policy. In Arizona, Dr. Francis is deeply involved as a member of the ASU community in helping build the university’s outreach and development efforts. She serves on a number of boards and commissions, including the Governor’s P-20 Council as chair of the Subcommittee on Improving High School Graduation Rates and as an advisor to the Center for the Study of Law, Science and Technology at the Sandra Day O’Connor College of Law at ASU. Her overall objective is to assist in advancing an Arizona public policy agenda that meets the needs of all Arizonans.

1.5 How project will be accomplished

Leaders in all sectors understand the need to improve student performance at all K-12 grade levels in order to increase the state’s high school graduation rate. This project – planning, building and maintaining a sustainable, world class website to support change management in education – is intended to create the technical infrastructure needed to provide educators, school board members, policy makers, business and civic leaders with the electronic communication tools they need for collaborative, thoughtful action.

TALENT: The first step in developing a high quality website that delivers the benefits envisioned is talent. The Center is committed to “getting the right people on the bus” by pursuing an aggressive hiring and outsourcing strategy.

STRATEGIC PARTNERSHIPS: The second component in achieving the project goals is developing a network of highly productive strategic partnerships that link all sectors – academic, government, business and not-for-profit. The partnerships will help inform the products and services of the Institute as well as the content of the website.

MARKETING AND PROMOTION: A variety of strategies will be executed to drive people to the website.

The details of our activities and plans to date are included in Section Two – Operational Strategies, Development Status.

SECTION TWO – OPERATIONAL STRATEGIES

2.1 Development and production

The Center for the Future of Arizona has moved aggressively to capitalize on the public response to BEAT THE ODDS and put the components in place to develop the website project.

2.1.1 Development status

Strategy One: Talent

- In November 2006, the Center for the Future of Arizona launched a search for a full-time director of web communications to oversee the development of the BTO website. As envisioned, the position would be responsible for leading and managing overall strategic and creative development of the BEAT THE ODDS website, including design, content, functionality, marketing effectiveness and overall utility.

Outcome: Robert Luster, former director of web communications at the ASU Foundation, joined the staff on December 11, 2006. His experience in corporate web development provides the complete technical and programming support needed to build and maintain the “back end” operations for the website envisioned in the proposal with the appropriate level of utility, design and message integrity, and customer service. In addition, his experience at ASU will help the Center ensure that the website capitalizes on resources and information available via ASU, UofA, NAU and ABOR websites.

- In early December 2006, the Center selected a marketing and public relations firm to support the web development effort with graphic design, key messaging and public relations services.

Outcome: After a formal RFP process, the firm of Riestler was selected based on their understanding of BEAT THE ODDS and their social marketing experience in public, private and nonprofit sectors. Under the leadership of President and CEO Tim Riestler, the firm's current client list includes the Arizona Science Center, the California Department of Conservation, the Scottsdale Convention and Visitors Bureau, Thunderbird – the Galvin School of International Management, Big Brothers Big Sisters, the Arizona Department of Environmental Quality, Greater Phoenix Economic Council, the Maricopa Association of Governments, Maricopa Community Colleges, the University of Utah and others. Headquartered in Phoenix, Riestler has additional offices in Los Angeles and Salt Lake City.

- In late December 2006, the Center launched a national search for the newly created position of director of the BTO Institute. As the founding director, the position will be directly responsible for operationalizing BEAT THE ODDS and its findings as an important tool in the statewide and national discussion on education reform. The successful candidate will have a minimum 10 years experience as a senior executive with a demonstrated track record in organizational change and an understanding of multi-sector collaborations. The position will report directly to Center CEO Dr. Lattie Coor; funding will be provided by the Stardust Foundation.

Outcome: Search underway.

- In spring 2006, the Center contracted with Pat Beaty Consulting to support the organization's strategic planning, marketing and development needs. She is the former VP of Strategic Planning and Marketing for the ASU Foundation and former Vice Chancellor of Strategic Planning at the Colorado State University System. She is working with the Center leadership on a broad range of projects related to strategic business planning, concept development, fundraising and marketing.
- In October 2006, the Center contracted with Rebecca Heller LLC to provide public relations support for Center activities with a special emphasis on BEAT THE ODDS and its website project. Prior to founding Heller & Associates LLC, she held the positions of supervisor of marketing communications for Arizona Public Service, marketing director of the Phoenix Symphony and director of communications for Childhelp USA. Rebecca will provide writing and public relations support for the website in addition to her other responsibilities.
- The firm of Tequida & Gutierrez has also been retained to support public relations efforts in Arizona with a special emphasis on the Latino community. A primary responsibility is working with the Spanish language media on behalf of the Center and the BEAT THE ODDS Institute.

- B.J. Tatro has been retained to develop and implement appropriate evaluation and assessment programs for all BTO activities. Initial funding for assessment and evaluation activities has been provided by the Arizona Community Foundation.

Strategy Two: Strategic Partnerships

The second component of success in achieving project goals is developing a network of highly productive strategic partnerships that link all sectors – academic, government, business and not-for-profit. Improving student performance and increasing high school graduation rates is one of the nation’s greatest challenges, and it requires an overarching sense of purpose as well as the concerted and collaborative efforts of numerous individuals, agencies and organizations.

ACADEMIC SECTOR: It is important to note that the BEAT THE ODDS website project was conceived in conjunction with ASU’s Office of Strategic Communications under the guidance of its former director, Jake Kupiec.

- The relationship with ASU’s central web communications team will be maintained under the leadership of Robert Luster to ensure the website aligns with and supports ASU goals in communicating with its education constituencies. In addition, the project team will develop similar contacts at the University of Arizona and Northern Arizona University to establish similar collaborations and web links at the central administrative level.
- In addition, the BTO Institute will actively pursue identifying faculty in many disciplines at all three universities whose research/teaching interests support the goals of this project. Faculty expertise, combined with expertise from the private and nonprofit sectors, will contribute to the development of the training modules for principals, teachers and school board members. It may also support the instructional needs of the project and the development of case studies and pragmatic tools that help principals manage change and teachers achieve higher levels of student performance in the classroom.

OTHER SECTORS: There are many outstanding agencies and organizations working to improve education in Arizona and around the country – including state departments of education, professional associations at both state and national levels, and numerous foundations and not-for-profit organizations that are dedicated to the great challenge of education in the 21st century.

In July 2006, the Center for the Future of Arizona began developing a comprehensive marketing plan to capitalize on the momentum and window of opportunity created by the release of the BEAT THE ODDS research study. The resulting plan calls for high levels of engagement and collaboration with organizations that share the Center’s values and goals in education.

- At the local level, the Center has established partnerships with a number of individuals and organizations to support dissemination and implementation of BEAT THE ODDS and its research findings.

Funding Partners:

- Stardust Foundation -- \$250,000 to support statewide and national dissemination of the study and \$150,000 annually to fund the director position for the Institute.
- Arizona Community Foundation -- \$100,000 to develop first generation content for the principal training modules and to develop models for ongoing program assessment and evaluation. The firm of B.J. Tatro has been retained to support the development of useful assessment and evaluation models.
- Salt River Pima Indian Community -- \$250,000 to expand activities throughout the state.
- Rusty & Rosie Lyon -- \$100,000 to support the development of the Institute and its capacity for “grass roots” improvement in student achievement.

Grants and gifts to date leverage the ABOR funds requested in this proposal at the rate of approximately 1:1. That ratio will increase significantly over the three funding years.

It should be noted that funding for the BEAT THE ODDS research study was originally provided by a lead gift from the Bruce T. Halle Family Foundation with additional support provided by a public-private funding mix that included the City of Phoenix, Valley of the Sun United Way, Arizona Community Foundation, Honeywell and Arizona State University.

The Center is committed to maintaining its philosophy of leveraging resources from all sectors as it moves forward. This philosophy is critical to addressing the long-term sustainability of the website described in Section Two – Operational Strategies, Sustainability.

Program Partners:

- Wallace Foundation State Action for Education Leadership Project – The goal of the Wallace grant is to ensure that state policies assist superintendents and principals in leading their schools to higher student achievement levels. The project leader, Dr. Rene X. Diaz, is actively working with the Center to engage principals and develop the kinds of leadership training required to manage K-12 schools in the 21st century.
- Arizona School Boards Association – The Center is working closely with Executive Director Panfilo Contreras to disseminate BEAT THE ODDS to its membership, host school-based community forums and engage nearly 150 Latino and Native American school board members in substantive discussions about implementing the report findings.

- Arizona State University – Dr. Coor and Dr. Francis have met with Kimberly Loui and Amanda Burke in the Office of University Initiatives to explore opportunities for collaboration between BEAT THE ODDS and ASU’s new initiative, “Leaders for Learning: The Arizona Model for Principal Leadership.”
 - Governor’s P-20 Council – The Center’s executive director, Dr. Sybil Francis, serves on the P-20 Council and chairs the Data, Assessment and Graduation Compact Committee. Her efforts have resulted in the Governor’s adoption of a core CFA goal – increasing the state’s high school graduation 12 percent by 2012. Maintaining an alliance with the P-20 Council is a key strategy.
 - Greater Phoenix Leadership – As a long-term member of GPL, Dr. Lattie Coor works continuously to keep important issues before community leaders. He met individually with key staff and members of GPL to review the BTO report at its release and continues to communicate regularly to keep them informed of BTO plans and activities as they develop.
- At regional/national levels, the Center is moving forward to establish additional alliances that support the national goals of the BTO Institute and its website.

Preliminary discussions have been held with:

- Teach for America – Wendy Kopp is deeply committed to systemic reform in American education and has distributed BEAT THE ODDS to her organization’s constituent base.
- WestEd – The Center is pursuing conversations with Paul Krohler to partner on projects related to improving education for mostly poor, mostly Latino children in border regions and other schools throughout the four-state service area.
- Pew Center for the States – Executive director Mary Jo Waits, who led the BEAT THE ODDS research team, remains committed to positioning its principles as a force for systemic change.
- TriAdvocates – An Arizona-based advocacy and lobbying group, the Center has had preliminary conversations with John Kelly to explore ways in which BEAT THE ODDS can impact coming Congressional discussions of “No Child Left Behind.”
- Dilenschneider Group – A New York- based firm, Dilenschneider has expressed interest in helping the Center connect with Congressional and foundation leaders interested in systemic change in American education.
- Arizona School Administrators – Dr. Coor has met with Dr. Roger Short to begin discussions on how BEAT THE ODDS can support the organization regionally and nationally in its commitment to educational leadership.
- Arizona Education Association – Similar conversations have begun with John Wright, AEA President.

The Center is committed to developing these relationships into formal alliances that support the goals of this proposal.

The unique status of the Center and its senior leadership – and their strong relationships with leaders in academic, government, business and not-for-profit sectors – provide many opportunities for developing the BEAT THE ODDS website into a significant tool for thoughtful action and social change.

2.1.2 Production process

The following activities will occur specifically through the use of ABOR funds provided through funding of this proposal:

Planning and physical construction of website:

- Robert Luster will oversee the planning and development of the website utilizing the resources of consultants and vendors as appropriate.

Strategic partnerships:

- Dr. Coor, Dr. Francis and the BEAT THE ODDS Institute Director (when hired) will develop the strategic partnerships required in all sectors to provide the products and services needed to achieve the outcomes sought by the project.

Sustainable financial support:

- Dr. Coor and the Institute Director (when hired) will oversee the development and execution of a long-term funding plan that includes gifts, grants and user/member fees to ensure the long-term sustainability of the Institute and its website. This activity will produce new web content as well as new revenue.

Development of supporting infrastructure:

- Student Engagement – The senior staff of the Center is exploring the concept of developing and a plan to engage undergraduate university students to support the website as a significant learning experience in social entrepreneurship. The model would include a combination of course credit, scholarship and work-study opportunities. Students would work on applied research projects that add value to the website content.
- Faculty/Expert Engagement – The senior staff of the Center will develop and execute a plan to engage faculty and experts in all sectors who have the capacity to contribute research and expertise relevant to education reform, public policy, executive training for principals and school board members, teacher training in the use of data as it relates to student achievement, etc.

Evaluation and assessment:

- Under a grant from the Arizona Community Foundation, the Center is developing a comprehensive approach to evaluation and assessment of all Center activities. Funds from this project will allow the model to be extended to include the BEAT THE ODDS website and its projected outcomes.

2.1.3 Cost of development

Description	FY 2007	FY 2008	FY 2009
Staff: FT Director of Web Communications PT Support Staff	\$100,000 22,000	\$100,000 22,000	\$100,000 22,000
Equipment: Hardware/software	\$ 5,000	\$ 2,000	\$ 2,000
Consultants: Web writing Strategic planning/new business development Sustainability Fundraising	\$ 25,000 35,000	\$ 25,000 40,000	\$ 25,000 40,000
Agency: Design/creative/key messaging – 300 hours @ blended rate of \$150 per hour in year one; 100 hours annually thereafter.	\$ 45,000	\$ 15,000	\$ 15,000
Annual Fees Web-based business operations (online credit card payment capacity, etc.)	\$ 1,000	\$ 1,000	\$ 1,000
UG Social Entrepreneurship Program Course credit development fees Undergraduate scholarships/work study Note: Target is 10 students on blended model to begin Fall 2007.	\$ 12,000	\$ 15,000	\$ 15,000
Graduate Stipend Direct undergraduate social entrepreneurship program		\$ 25,000	\$ 25,000
Assessment & Evaluation: Expansion of evaluation model to include website with analysis and reporting.	\$ 5,000*	\$ 5,000*	\$ 5,000*
TOTALS	\$250,000	\$250,000	\$250,000

* Percentage of total assessment/evaluation costs for BTO Institute assigned.

The budget for the proposal reflects the best thinking of the Center for the Future of Arizona on how to position BEAT THE ODDS as a useful tool for the many constituencies working on education reform today. We believe the budget is modest, given the projected outcomes, and designed to significantly leverage ABOR investments.

2.1.4 Labor requirements

The pool of candidates for individual hires, both FT and consulting, were identified individually through a private search activity and each was personally selected by Dr. Lattie Coor.

A short list of public relations agencies with the capacity for regional and national marketing was identified and each firm was interviewed by Dr. Coor. After the preliminary interview, a formal RFP was developed and sent to the potential vendors. The Riester firm was among the responding firms and was selected to work with the Center on the website project as a result of the process.

While the student recruiting plan is under development, it is anticipated that the Center will work with campus programs already committed to the values of social entrepreneurship. Potential partners at ASU include the Pat Tillman Leadership through Action Program and the Doran Community Scholars Program. Specific plans to recruit and engage students will be developed with program directors.

2.2 Marketing and promotion

As detailed in Section 2.1.1, Development Status (page 11), the Center has retained two independent consultants and the services of the Riester agency to work with staff on the development and marketing of the BEAT THE ODDS website. The personnel will work collaboratively to develop a comprehensive plan for promoting the website that utilizes a combination of “push” strategies that deliver information directly to key constituencies and “pull” strategies that influence target audiences to come to the website.

2.2.1 Strategies

The plan will include the following components:

- Key messages will be developed for each target audience (teachers, principals, school board members, elected officials, community leaders, news media, potential donors and grant makers, select mayors in target cities, etc.) and appropriate channels of message distribution will be identified.
- Electronic database will be developed for each target audience to support “push” messages and announcements designed to drive people to the website.
- Testimonials will be actively sought from educators and leaders in all sectors.
- Materials (electronic and print information kits) will be prepared and distributed appropriately to create “pull” among constituents.
- Web links will be established with all appropriate partner organizations, including the universities.
- Strategic partners with existing information distribution systems will be identified and encouraged to promote the new website and its training modules to their individual constituencies (e.g., existing electronic and print newsletters

of organizations such as principal groups, school board associations, national organizations such as Teach for America, etc.).

- When possible, training modules will be made available to groups, such as teachers in a specific school/district or all board members from a specific district.
- Statewide/national print, web, and radio awareness campaigns will be executed.
- All future speaking engagements by Dr. Coor will include encouraging people to visit and utilize the website.
- Personal meetings will be held with policy makers in Washington as discussions on “No Child Left Behind” move forward. A small number of leaders will be invited to participate in a calendar of webcasts to stimulate discussion and promote the website as a key source of information and dialogue.
- Similarly, a satellite media tour will be organized to provide media with information on key topics and to promote the BEAT THE ODDS website as a preferred and reliable source of expert, up-to-date information.

2.2.2 Method of promotion

The Center will use a variety of promotion methods, including web marketing, direct mail, media relations, personal visits by Dr. Coor and other Center leaders, radio and satellite media tours and the advocacy capabilities of its many partners. The BEAT THE ODDS Institute and its website will become a recognizable “brand” for the Center, and the Arizona University System.

Calls to the Center, emails and website interactions will be tracked in the database with follow-up provided via email, electronic newsletters, etc.

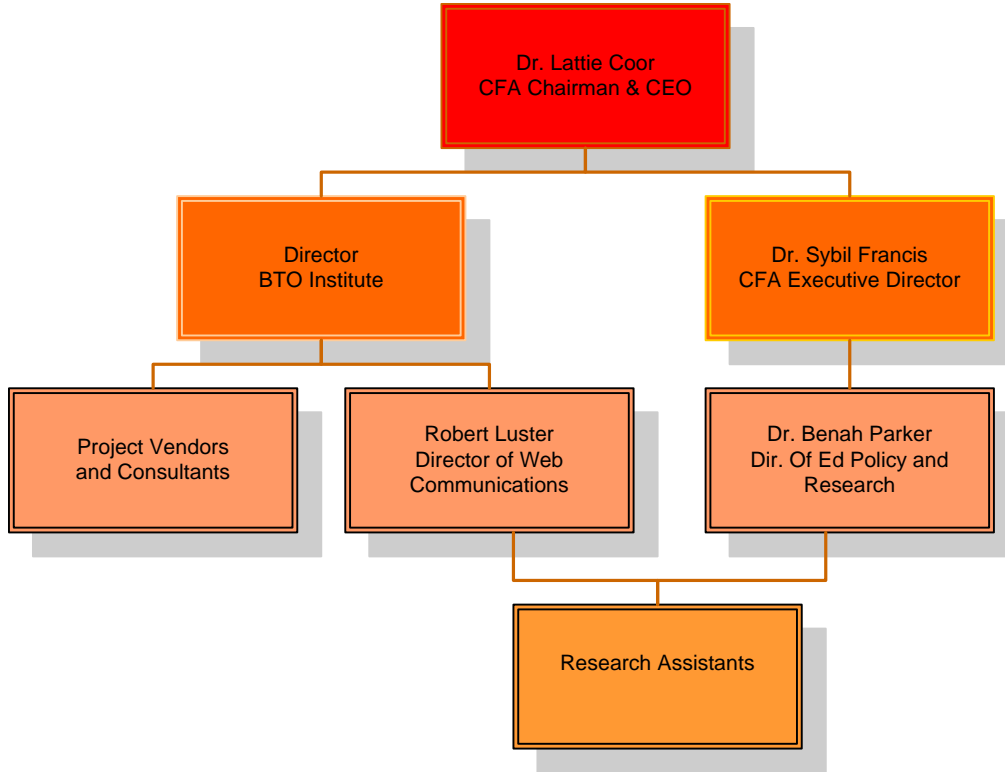
2.2.3 Advertising and promotion plans

The marketing strategy will utilize existing channels for advertising, public relations and promotion as appropriate, including campus resources.

For example, in promoting the airing of the PBS Special on Jim Collins that features BEAT THE ODDS, the Center bought time on National Public Radio stations in both Phoenix and Tucson to support on-air promotions provided by KAET-Channel 8 and KUAT-Channel 6.

2.3 Project management

2.3.1 Description of the organizational structure for the website project



2.3.2 Advisory boards

Oversight for all activities of the Center for the Future of Arizona is provided by a Board of Directors that includes:

Lattie F. Coor, Chairman and CEO, Center for Future of Arizona

President-Emeritus, Professor and Ernest W. McFarland Chair in Leadership and Public Policy in the School of Public Affairs at Arizona State University.

Nadine Mathis Basha

Currently serves on the Board of Directors for WestEd, a regional educational research and development organization, the Arizona Business and Education Coalition, and is a member of the International Women’s Forum. She founded the Children’s Action Alliance, served on the executive committee for ASU’s capital campaign and as a Dean’s Associate for the ASU College of Education.

George Dean, President and CEO of the Greater Phoenix Urban League

Currently serves on numerous boards, including the Maricopa Community College Bond Advisory Board and the ASU Barrett Honors College Advisory Board.

Nationally recognized for his leadership on minority issues, his efforts focus on advocacy for minority communities in the areas of education, training, job placement, affordable housing and economic development.

Paul J. Luna, President and CEO of Helios Foundation

Former president of Valley of the Sun United Way, his career includes corporate, government and nonprofit experience. Recognized as one of the Valley's up and coming community leaders, he has led initiatives to increase access to quality early care and education for all children. He is a member of the Greater Phoenix Leadership and currently serves on the Governor's School Readiness Advisory Board, the Arizona Grant Maker Forum Advisory Board and the City of Phoenix Sky Harbor Airport Citizen's Advisory Board.

Jack Pfister

Former general manager of Salt River Project, his community service includes serving on the Arizona Board of Regents, the Arizona Judicial Council, and chair of the Governor's Growing Smarter Commission and chair of Arizona Town Hall. Currently president of the ASU Research Park, he serves on the board of the Flinn Foundation and has also served as one of three co-chairs of the Governor's Water Management Commission.

OTHER ADVISORY GROUPS

In addition to the Center's Board of Directors, Dr. Coor is in the process of organizing advisors for the project with a special emphasis on Latino educators and civic leaders. Congressman Ed Pastor and Valley leaders Paul Luna and Jose Cardenas are working with the Center on this effort.

2.4 Sustainability

2.4.1 Anticipated funding sources for ongoing support

The BEAT THE ODDS Institute, its programs and activities, including the website, must become self-sustaining over the next three years. To achieve this outcome, the Center will actively pursue strategies that produce the following kinds of income:

- Course fees and ongoing expert support for training modules developed by the Institute.
- User fees for professionals interested in participating in online webcasts and other activities related to best practices and policies in education.
- Grant funds from state/federal agencies, corporations and nonprofit organizations.
- Gifts from organizations and individuals with a passion for education and its transforming power to change lives.

The Center for the Future of Arizona is committed to building a sustainable enterprise that plays a leadership role in helping Arizona strengthen its educational system. Success requires achieving a funding mix that not only sustains the programs and services we initiate – but that assembles an influential group of partners who have a financially vested interest in the outcomes we seek.

2.4.2 Timeline for transitioning away from TRIF support

The Center for the Future of Arizona is committed to achieving self sufficiency for the BEAT THE ODDS website by the end of the three-year TRIF funding cycle.

SECTION THREE: Goals, Metrics, Outcomes

3.1 Specific, realistic and measurable goals

3.1.1 Return on Investment (ROI)

ROI for the website project will be measured in several ways.

- Grants and gifts: Funds from state/federal agencies, corporate and foundation grants, and individual gifts.
- Website use: Data tracking site visits and use of various resources and services.
- Enrollments: Number of educators and school board members participating in training modules.
- Webcasts: Number of participants subscribing to webcast schedule.
- Student engagement: Number of students participating in applied research and service opportunities.
- Media: Number of citations referencing the BEAT THE ODDS study, the Institute and its website and/or quoting Center leadership on issues related to BEAT THE ODDS principles.
- Strategic Partnerships: Number/quality of partnering organizations and measurable impact of partnerships on organizational change in our schools.

As noted, a search is underway for the Director of the BEAT THE ODDS Institute. Once the hire has been made, Dr. Coor will work closely with the Director to detail a 3-year schedule of performance metrics in each of the above categories.

3.1.2 Knowledge transfer

The Center for the Future of Arizona is deeply committed to helping Arizona improve student performance in order to increase the state’s high school graduation rate. Promoting the principles of BEAT THE ODDS as a planning framework for making the kinds of organizational changes required is a critical part of achieving that goal. Identifying and promoting case studies and best practices, disseminating new research and encouraging dialogue on the issues are all central to the effort we have undertaken.

3.1.3 Industry outreach

The BEAT THE ODDS website will support industry by focusing public attention on the needs of the business community for an educated workforce. The outcome we all seek is a sustainable pipeline of well-prepared talent.

3.1.4 Workforce contributions

The BEAT THE ODDS website will contribute to the quality of Arizona's workforce in several ways. First, the impact of training for educators and school board members trained by the Institute via the web will continue for years to come.

It is also expected that the BEAT THE ODDS movement will have an impact on the job description of K-12 principals in the 21st century. This, in turn, will ultimately impact the training that educators receive in preparation for their careers.

Ultimately, the impact of BEAT THE ODDS will be on students – the future workforce of Arizona. Every student who succeeds in school, graduates from high school with full access to post-graduate education and training will make a positive contribution to the sustainable prosperity of our state.

3.1.5 Educational outreach

This initiative will develop new training modules for principals, teachers and school board members that will help develop the array of skills needed for the successful management of K-12 schools today.

Managing organizational change, collaborative entrepreneurship and data-based decision making are not part of the education curriculum in our universities. Our intent is to bridge that gap and to use the development of these training modules as a “leapfrog” strategy that will ultimately impact college curricula in the future.

3.1.6 Government agency/community outreach

As envisioned, the BEAT THE ODDS Institute will be a network of strategic partnerships that engage agencies and organizations in all sectors. It cannot succeed otherwise. The Institute will pursue both “top-down” and “bottom-up” strategies. In the former, the Institute will seek collaborations with policy makers at state and federal levels as well as special appropriations and grants. At the same time, the Institute must work closely with individual teachers, principals and school board members at the local school level. We all share a vested interest in individual student performance. The Center and the Institute it is launching are committed to helping government, business and the nonprofit sectors work together to achieve an aggressive goal – increasing Arizona's high school graduation rate by 12 percent.

3.1.7 Partnerships and collaborations

Systemic change is not possible without multi-sector collaborations to achieve common goals. The Center for the Future of Arizona is a small organization with a large presence – the leadership understands clearly the need to create a network of strategic partnerships that help Arizona move forward.

From its inception, the Center has relied on gifts and grants from a number of funding partners to support specific projects that are well-defined and that produce real outcomes. With the release of BEAT THE ODDS, the list is growing and beginning to include program partners. The emerging collaborations to date are detailed in section 2.1.1 on pages 13-15.

3.2 Timeline for achievement of goals

The BEAT THE ODDS Website Initiative is a three-year project in terms of all its components: planning, site construction, marketing and financial self-sufficiency.

- **PLANNING:** The planning component (including key messaging and graphic templates) is underway, and the required expertise for both planning and development is now in place. It is anticipated that the plan will be completed by March 1.
- **SITE CONSTRUCTION:** Phase 1 of the website will require approximately five months of programming and content development time. It is anticipated that the first phase will be ready for testing during spring/summer 2007. Phase 2, which will include more extensive policy/legislation tracking functions, will be ready for launch in fall 2007.
- **MARKETING:** The marketing effort will begin immediately as the Center enters into more formal alliances with other agencies, associations and organizations. It will be an ongoing effort, continually refreshed by a calendar of webcasts, new functions added to the site, surveys, etc.
- **FINANCIAL SELF-SUFFICIENCY:** The Center and the Institute will continue seeking grants and gifts as appropriate. In addition, it will be pursuing other business goals related to course offerings, site subscription services, etc. as the training modules and functions are added to and available via the website. The goal is for the site to be completely self-sustaining by the end of FY 2009 when ABOR funding ends.

3.3 Early proof of performance

In addition to assembling the team of staff, consultants and vendors to move the website initiative forward, the Center has moved rapidly to capitalize on the momentum of BEAT THE ODDS.

- **PUBLIC POLICY:** At the state level, the Governor's P-20 Council has adopted one of the Center's primary goals – increasing Arizona's graduation rate 12 percent by 2012 – as a result of the leadership provided by Dr. Sybil Francis in her role as chair of the Data, Assessment & Graduation Compact committee of the P-20 Council.

At the federal level, Dr. Lattie Coor and Congressman Ed Pastor met with a number of federal officials in May 2006, including the Congressional Hispanic Caucus, members of the House Education and Appropriations Committee and Aspen Institute Congressional breakfast participants to discuss how BEAT THE ODDS principles and recommendations could help inform the goals of “No Child Left Behind” as the legislation comes up for reauthorization in 2007. Dr. Coor has also met with two other Washington policy groups to begin identifying ways in which BEAT THE ODDS can be positioned as an important tool in the coming discussion on education reform.

- **EDUCATIONAL OUTREACH:** Center leaders and staff have met with numerous educators in Arizona school districts and schools. Our 2006 presentations to education leaders include keynote addresses at the annual conferences of the Arizona School Administrators (ASA) and the Arizona School Boards Association (ASBA). Creighton School District is implementing BEAT THE ODDS principles at Excelencia Elementary School, which has a student population that is more than 90% Latino and low-income. Excelencia’s experiences are expected to provide a case study that will help other districts implement BEAT THE ODDS principles in their schools.
- **COMMUNITY OUTREACH:** The Center has hosted four BEAT THE ODDS community forums as well as two bilingual Latino forums on October 11 and November 15, 2006. More than 150 parents, teachers, staff and school principals representing 19 schools and several school districts participated in the November 2006 forum. A 12-page summary of BEAT THE ODDS has been translated into Spanish and is being distributed both locally and nationally.
- **TRAINING:** One key recommendation of BEAT THE ODDS was for highly focused and sophisticated management training modules for principals that include such content topics as managing organizational change, collaborative entrepreneurship and data-based decision making. Under the leadership of Jack Pfister, a member of the Center’s Board of Directors, planning for these modules is moving forward rapidly. Working with a number of partners, the Center has developed a three-day curriculum that was reviewed on December 15, 2006, by Circle of Honor principals (the top one percent of Arizona K-12 school principals). Their feedback will be incorporated into a seminar for school board members scheduled for February 2007. These endeavors were made possible by a \$100,000 Arizona Community Foundation grant funded by the Sybil B. Harrington Trust and a \$250,000 grant from the Salt River Pima-Maricopa Indian Community.
- **INSTITUTE DIRECTOR:** During the first quarter of 2007, the Center will identify an experienced director for the BEAT THE ODDS Institute. This senior management position is being funded by a second grant from the Stardust Foundation, and recruitment is now underway.

In combination, these activities are vital to the challenge of transforming the BEAT THE ODDS study into a dynamic new Institute – a movement that seeks to improve student performance for all children by empowering the people who teach them and are responsible for their success.

SECTION FOUR – PRO FORMA FINANCIALS

4.1 Funding Request: Resources and Planned Expenditures

	FY 2007	FY 2008	FY 2009
REVENUE:			
TRIF Revenue	\$ 250,000	\$ 250,000	\$ 250,000
TOTAL REVENUE:	\$ 250,000	\$ 250,000	\$ 250,000
EXPENDITURES:			
Personnel:			
FT web manager, PT			
Support staff	\$ 122,000	\$ 122,000	\$ 122,000
Vendors & Consultants	105,000	80,000	80,000
Assessment/Evaluation	5,000	5,000	5,000
Equipment and Fees	\$ 6,000	\$ 3,000	\$ 3,000
Student program	\$ 12,000	\$ 40,000	\$ 40,000
TOTAL EXPENDITURES	\$ 250,000	\$ 250,000	\$ 250,000