



2022-2025 STRATEGIC PLAN

STRATEGIC PLAN

October 2022

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BACKGROUND

EdSource believes all students deserve a quality and equitable education in California and beyond. As a non-profit, independent news organization, EdSource knows that an informed, involved public is necessary to strengthen education to improve opportunities now and in the future. The need for high quality, authoritative and investigative journalism that is focused on education is crucial now more than ever. Since 1977, EdSource has delivered education analysis and continues to be an indispensable authority on the most pressing education issues in California and the nation.

In February 2022, EdSource initiated a planning process designed to help it make key decisions about how to advance its mission in light of the challenges currently facing the education system in California. EdSource has recently grown in resources and staffing (including a new CEO hired in 2021), and the COVID pandemic resulted in a new wave of interest and attention on education.

This strategic plan is the result of a series of data collection activities, analyses, and robust deliberation among EdSource staff and board about the most important opportunities for the organization to leverage. It includes EdSource's first Theory of Change, which can be used for evaluation, as well as ongoing strategy refinement, and identifies a set of strategies that the organization will implement over the next 3 years to improve internal performance and increase external impact.



STRATEGIC PLANNING COMMITTEE

The stewardship of the planning process was held by a **Strategic Planning Committee**, comprised of EdSource staff and board members:

- Darin Brawley, Board Member
- Adam Eisenberg, Managing Editor
- Mufaddal Ezzy, Board Member
- Molly McGee Hewitt, Board Member
- Janelle Kubinec, Board Member
- Stephanie Nguyen, Director of Operations
- Smita Patel, Director, Communications and Partnerships
- Don Shalvey, Board Member
- Joel Vargas, Board Member
- Anne Vasquez, CEO

DATA COLLECTION METHODS

- **Interviews with external stakeholders.** LFA conducted one-hour video interviews with 12 external stakeholders to gain perspectives and insights about the value and impact of EdSource's work and areas of opportunity as it entered into the strategic planning process. Interviewees included:

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| <ul style="list-style-type: none">• Stephanie Chavez, Education Editor, LA Times• Ben Chida, Chief Deputy Cabinet Secretary, Office of Governor Newsom• Regan Douglass, Director of Strategic Communications, College Futures Foundation• Mike Fine, CEO, Fiscal Crisis and Management Assistance Team (FCMAT)• Neha Gohil, Program Officer, Hewlett Foundation• Phil Halperin, President, and Macy Parker, Program Director, Silver Giving Foundation | <ul style="list-style-type: none">• September Jarrett, Program officer, Heising-Simons Foundation• Michael Kirst, Co-founder, PACE, and Professor Emeritus of Education and Business Administration, Stanford University• Pedro Noguera, Dean, USC School of Education• Frank Pine, Executive Editor, MediaNews Group• Tracy Sherman, Program Officer, Gates Foundation• Patrick Shields, Executive Director, Learning Policy Institute |
|---|--|

- **Funding model analysis.** With the assistance of development, operations, and executive staff, and with input from the Strategic Planning Committee, LFA gathered and reviewed financial and fundraising documents in order to guide the development of an analysis of EdSource's funding to determine strengths and vulnerabilities.
- **Board and staff input.** In addition to regular weekly or bi-weekly check-ins with EdSource's senior leadership, LFA facilitated five Strategic Planning Committee meetings, as well as two staff sessions and two board sessions to generate input on the formation and refinement of goals and strategies. The staff sessions focused on articulating key components of the EdSource's Theory of Change and brainstorming priorities for improving and expanding EdSource's reporting and convening activities. The board sessions generated ideas about how to strengthen the funding model based on the data and recommendations in the analysis, as well as ideas for how to refine an initial set of strategies and goals developed by the Strategic Planning Committee.

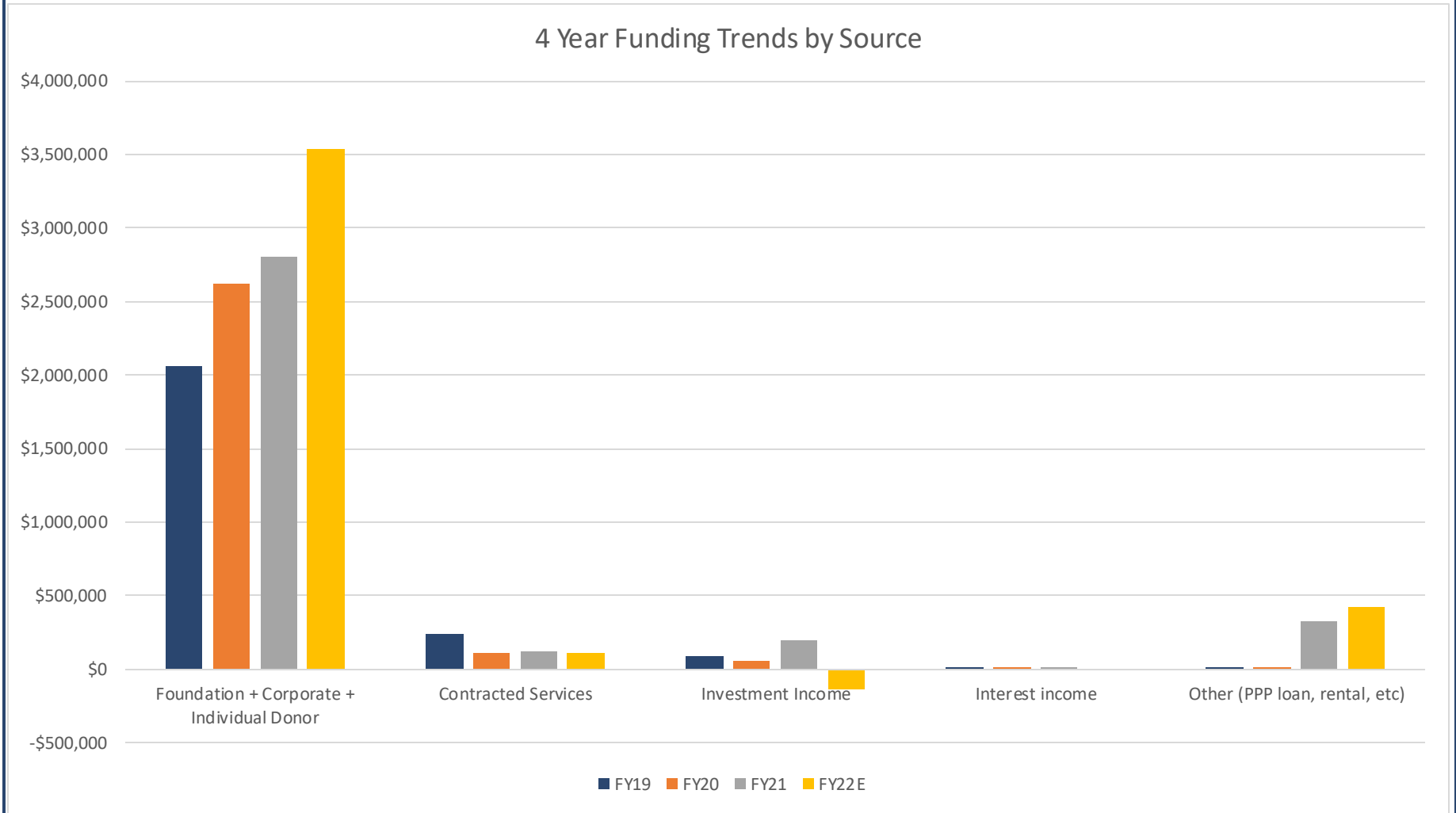
WHAT WE DISCOVERED

The stakeholder interviews drew out valuable perspectives about EdSource's journalism, role, and priorities for strategic direction. Key findings are summarized at a high-level below, and explored in greater detail in a memo. These perspectives informed the development of the Theory of Change and the set of strategies that will guide EdSource's work for the next 3 years:

- EdSource is a trusted, credible source of information on education issues in California. It is balanced in its reporting, depicting multiple sides of an issue in ways that allow readers to draw their own conclusions.
- EdSource has deep expertise in a range of education issues in California that allows it to provide much more nuanced and informed reporting on education issues than local news outlets, while providing a focus on California-specific issues that some of the national education reporting organizations cannot.
- EdSource's ability to make complex information clear and relatable to the public is a critical ingredient to influencing the public narrative about what matters in education.
- EdSource's ongoing efforts to address the day-to-day realities of families with children in the school system is important in light of the education system's challenges in being able to effectively engage or respond to parent interests or concerns.
- A critical tension for EdSource to navigate in an ongoing way is the balance of reporting on local (districts or schools) versus regional (county offices of education) versus state-level education issues.
- Stakeholders reported using and valuing both EdSource's daily reporting and in-depth reporting, and encouraged EdSource to continue experimenting with different multimedia formats— including video – in service of trying to reach and engage more diverse audiences.
- The overall direction counseled by stakeholders was for EdSource to “double down” on its current role and geography, and to continue to reflect on how diversity, equity, and inclusion (DEI) play out both within EdSource's own newsroom, as well as the issues it chooses to cover in the education ecosystem.

WHAT WE DISCOVERED: FUNDING MODEL

EdSource's overall revenue has seen a significant increase over the past four years, driven primarily by foundation revenue.



WHAT WE DISCOVERED: TOPLINE FINDINGS

- Overall, EdSource's funding model is stable and predictable, with little change over the past 4 years.
- Revenue has been growing over the past few years, reflecting increased effectiveness of the development function.
- EdSource's funding model is highly reliant on grants from institutional funders, many of whom contribute significant amounts over multiple years
- EdSource has a substantial number of individual donors who give at low levels, representing an opportunity for growth and development.

THEORY OF CHANGE

A Theory of Change identifies the outcomes that an organization expects to see for the audiences it serves and describes how the products and activities it delivers interact to produce those outcomes.

EdSource staff came together in May 2022 to articulate its mission along with a set of assumptions and components that guide its work, culminating in outcomes it expects as a result of its work – the pieces of a Theory of Change. These rich conversations were used to craft a working draft of a Theory of Change, which was reviewed and iterated several times by the Strategic Planning Committee, staff, and board.

The high-level Theory of Change can be found on the following page. A more detailed Theory of Change document will be produced by the end of 2022, and will serve as a framework for assessing the impact of EdSource's work on the different audiences it serves.

EDSOURCE THEORY OF CHANGE

The need for EdSource

All students deserve access to a quality and equitable education in California and beyond. As a nonprofit, independent news organization, EdSource knows that an informed, involved public is necessary to strengthen education to improve opportunities now and in the future. The need for high quality, authoritative, investigative journalism focused on education is crucial, as general-interest newsrooms contract. Since 1977, EdSource has delivered education news analysis and continues to be an indispensable authority on the most pressing education issues in California and the nation.

Our target audience

People who influence and are impacted by education in California

What we do

Daily and watchdog reporting, quick guides, and data analysis & visualization



ENGAGE

Facilitate conversations with educators, policymakers, students and parents as a way to inform the public, as well as our journalism

The outcomes we expect to see

An increased understanding of:

How the education system works

How education affects other community issues

Current events and key education challenges

Best practices in places of learning

Meaningful involvement with education policy

Better informed decisions by policymakers

What is unique about our approach



Provide in-depth, investigative reporting on education



Develop nuanced analysis about complex issues



Deliver useful information that informs meaningful change



Committed to equity in education



Authoritative journalism that is trustworthy and balanced

CATALYZE



IMPACT



Increased accountability of administrators and policymakers

An educational system that produces more equitable student outcomes

Students are prepared for success in work and life

STRATEGIES

The primary challenge (and benefit) of strategy development is selecting a limited number of priorities that the organization will dedicate resources (both financial and personnel) to addressing and advancing over the period of time covered by the plan.

Data collected through stakeholder feedback and the funding model analysis, placed in the context of EdSource's new Theory of Change, provided the Strategic Planning Committee clear signals about an initial set of priorities over the next 3 years.

EdSource's current capacity and approach for delivering its reporting and convening functions were deemed to be strong, so the focus of external strategy development turned to the challenge of figuring out how to increase impact. The three external strategies, therefore, revolve around leveraging partnerships and collaborations to increase the reach of EdSource's content and increasing both the volume and quality of reporting and engagement of parents and policymakers.

To support expanded activities and ensure the ongoing performance of EdSource, the Strategic Planning Committee prioritized strengthening the organization's funding model with a focus on individual donors, and identified branding and Human Resources (with a focus on benefits) as key internal capacities for development.

Because EdSource is committed to ensuring that Diversity, Equity, and Inclusion (DEI) principles and practices are integrated into both our external work and internal operations, they have been incorporated throughout the activities and objectives in the strategies that follow, as well as into our Theory of Change.

To illuminate the way forward, EdSource has identified 3 external strategies and 3 internal strategies. Those are presented on the following pages, along with:

- A narrative description of why the strategy was selected.
- A goal statement with a 3-year horizon, along with sets of measurable objectives.
- High-level descriptions of activities that will need to be carried out to execute on the strategy.

EXTERNAL STRATEGIES

1

Expand EdSource's Reach

Why this is important: EdSource's ability to catalyze transformation in education is dependent on its position to inform its core constituencies: parents, students, educators and policymakers.

Why we need to focus on this now: While we have built a strong audience base over the years and made a lot of progress growing subscribers during the pandemic, finding new ways to get our information and analysis more widely distributed is a high priority.

2025 Goal

Double the number of news partners that carry EdSource content

2025 Objectives

- Add ten new distribution partners, including those that publish in other languages.
- Foster three new reporting partnerships, one of which is a newsroom outside of CA, focused on national issues.
- Hire two regular freelance writers reporting from other regions of the U.S.
- Successfully plan and publish at least two significant collaborative projects per year.
- Our audience reflects the racial and ethnic diversity of California.

Activities

- Diversify distribution network by proactively pitching (promoting lack of paywall) to other newsrooms and education organizations.
- Explore opportunities to report on topics of national concern through lens of California: Explore development of a freelance stringer network to expand national reporting.
- Identify and pitch to newsrooms for collaboration on specific topic areas.
- Conduct annual readership survey to measure the extent to which we are diversifying our audience

EXTERNAL STRATEGIES

2

Develop Content that Speaks to Parents and Students

Why this is important: Increasing public understanding of key education issues that results in catalyzing the citizenry to take action is key to achieving meaningful education reform. Parents and students represent powerful and vocal groups that have a direct stake in the quality of education.

Why we need to focus on this now: While we have significant existing expertise in reporting on issues important to parents and students, we need to continue to develop effective ways to communicate with these groups. Authenticity and nuance are key to meeting parents and students where they are, including on social media.

2025 Goal

Parents with children enrolled in schools and students make up at least one-third of EdSource's daily newsletter subscribers.

2025 Objectives

- Double the number of Spanish language media and/or radio station partnerships.
- Launch at least one new newsletter.
- At least 1 Roundtable per quarter with parents and/or students as panelists.
- Conduct at least two AMAs (Ask Me Anything) on Reddit per year.
- Produce at least one narrative podcast per year.

Activities

- Increase capacity to interview and report in Spanish.
- Develop editorial plans with parents and students in mind, including developing at least 1 Quick Guide per quarter.
- Revive and expand community network.
- Grow social media following on Twitter, Instagram and LinkedIn.
- Expand video and podcast storytelling to connect with parents and students, and consider expanding dedicated staff capacity to produce original content.
- Cultivate partnerships with parent organizations.

EXTERNAL STRATEGIES

3

Amplify EdSource's Expertise with Policymakers

Why this is important: Policymakers are important agents of change for improving how resources are allocated to ensure quality and equitable education for students.

Why we need to focus on this now: While EdSource has an excellent position and reputation with policymakers, it's important that we continue to improve our engagement with this key audience to help inform education reforms at the state and local levels.

2025 Goal

Be the go-to resource on education issues for policymakers.

2025 Objectives

- EdSource is cited 50% more often in legislative reports and Sacramento policy hearings.
- Double the number of commentaries by policymakers and thought leaders each year.
- At least 2 Roundtables per year with a policymaker as a panelist.
- Train at least 10 education reporters around the state on education policy.

Activities

- Identify and develop content around key policy issues.
- Fill critical gaps of knowledge among policymakers unfamiliar with education issues.
- Solicit and publish commentaries from policymakers and thought leaders at least once a quarter.
- Facilitate travel for staff to attend key hearings/meetings in Sacramento or around the state.

INTERNAL STRATEGIES

1

Expand EdSource Brand Awareness

Why this is important: Our ability to expand our impact requires an effective communications strategy to ensure we leverage all of our assets, including personnel and infrastructure.

Why we need to focus on this now: In order to increase our reach and improve our engagement with our key audiences, we need to build a stronger brand for EdSource that capitalizes on its expertise and insights while also preserving its journalistic integrity.

2025 Goal

EdSource is regularly cited on TV, radio, print and other mediums as an authority on education issues.

2025 Objectives

- At least 4 guest appearances on radio/TV shows each year.
- Explore distribution model with DML (Distributed Media Lab) to host widgets “Powered by EdSource” on at least 10 sites around the state and country.
- At least 2 speaker invitations on panels at education conferences.
- At least 4 EdSource press releases each year, highlighting award-winning work and collaborations.

Activities

- Update EdSource.org website, social media channels, and other communications collateral to ensure they are current.
- Push more content out to radio/TV/newspapers, including increased number of guest appearances on public radio.
- Put out at least 1 press release quarterly on PR Newswire.
- Improve branding of EdSource as specialists, as well as holders of statewide expertise to encourage others to focus resources on local coverage.
- Work with Distributed Media Lab to create a “Powered by EdSource” education collection hosted on multiple news websites.
- Conduct review of branding and communications content to ensure it is relevant to and resonates with a diversity of audience types.

INTERNAL STRATEGIES

2

Increase Financial Support and Sustainability

Why this is important: Our capacity to achieve broad impact is correlated with our ability to attract new resources, as well as our capacity to generate and manage sustainable revenue.

Why we need to focus on this now: The funding model analysis identified one area (individual contributions) with significant potential for growth that would increase financial sustainability and create a funding stream that would provide EdSource the flexibility to pursue a number of strategic initiatives.

2025 Goal

20% increase in revenue by 2025

2025 Objectives

- Membership model up and running.
- 10 additional donors who donate \$10K or more.
- 1 new individual donor at \$50,000 or more.
- 2 additional grants at \$100K per year.

Activities

- Significantly expand individual donor base and cultivate potential major donors.
- Explore membership model.
- Identify and promote regional collaborations that could generate donor interest in specific regions
- Explore new corporate funders.
- Identify national funders positioned to support EdSource coverage of issues of national concern.

INTERNAL STRATEGIES

3

Increase Effectiveness and Efficiency of Core Operations

Why this is important: Attracting and retaining and attracting top talent are critical to the success and impact of EdSource. Developing mature and efficient operations enables the organization to make the most of its financial resources and, ultimately, focus efforts around its core mission.

Why we need to focus on this now: The "Great Resignation" and a highly competitive job market make it more important than ever to ensure EdSource staff members are satisfied with the organization's benefits, HR services and general operations support. EdSource is overdue for an overhaul of its systems to manage employee benefits and donor relations.

2025 Goal

Improved effectiveness of HR administration and increased capacity to manage donor relations.

2025 Objectives

- New health benefits and retirement policies are supported by at least 75% of staff.
- Decrease staff turnover rate by a third compared to 2022.
- Transition to a HR/payroll system that is more automated and increases staff satisfaction.
- Increased capacity of development staff to manage donor relations.
- Our staff have the life experience, perspective, and skills to report effectively on the range of issues affecting the diversity of communities and cultures in California.

Activities

- Evaluate employee health and retirement benefits to determine new competitive benefits package and related policies.
- Implement new Benefit Administration and HRIS technology to facilitate efficient onboarding and payroll services.
- Implement CRM technology to support membership model and revenue analysis.
- Conduct review of recruitment and hiring practices to ensure that we maintain a workforce that is racially diverse and has a broad range of life experience.

MONITORING OUR PROGRESS

This plan lays out a roadmap for EdSource to advance six strategies that it believes it must execute over the next three years to best utilize its human and financial resources to advance its mission. In order to support the organization in navigating this road map, it is necessary to establish and adhere to a monitoring process that captures real-time data on progress.

The components of effective strategy monitoring include:

1. A well-constituted monitoring body with a clear charge.
2. A sense of ownership and responsibility on the part of personnel for the success of the strategies.
3. A steady, reliable supply of performance data related to the strategies.
4. A decision-making process for adjusting strategies in response to changing circumstance (external) or what is learned internally from executing on the strategies about what is working and what is not.




The Strategic Planning Committee will be invited to continue their service to EdSource as a Strategic Planning Monitoring Task Force that will convene once per year to review data about progress towards each of the goals contained in this document and ensure that adjustments are made to keep the organization on track toward the goals outlined in the plan, or to revise the goals if it is determined they are no longer appropriate or realistic.

The Strategic Plan Monitoring Dashboard presented over the next several pages will be used to collect and review data related to each objective in this plan.

MONITORING OUR PROGRESS: EXTERNAL STRATEGIES

Objective(s)	Objective Metric(s)	Status ● On track ● Not sure if on track ● Likely not going to meet metric	Notes Comments on how we will know that a benchmark is met; notes on the status
External Strategy 1: Expand EdSource's Reach			
➤ New Distribution Partnerships	Ten additional news partners by 2025		
➤ New National Reporting Partnerships	Three new partnerships by 2025		
➤ New Collaborative Reporting Partnerships	Two collaborative stories published per year		
➤ Racial/ethnic diversity of audience	Reflects that of California		
External Strategy 2: Develop Content that Speaks to Parents and Students			
Increase content on Spanish language media and/or radio stations	Double our content on these outlets by 2025		
Launch new newsletters	1 by 2025		
Roundtables with parent and/or student as panelist/guest	At least 1 per quarter		
Reddit AMAs (Ask Me Anything)	At least 2 per year		
Produce narrative podcast	At least 1 per year		
External Strategy 3: Amplify EdSource's Expertise with Policymakers			
EdSource citation in legislative reports and Sacramento hearings	Increase by 50% annually		
Increase number of policymaker and thought leader commentaries produced per year	2x as many per year		
Roundtables with policymaker as panelist	At least 2 per year		
Train education reporters around the state on ed policy	At least 10 by 2025		

MONITORING OUR PROGRESS: INTERNAL STRATEGIES

Objective(s)	Objective Metric(s)	Status  On track  Not sure if on track  Likely not going to meet metric	Notes Comments on how we will know that a benchmark is met; notes on the status
Internal Strategy 1: Expand EdSource Brand Awareness and Public Profile			
Guest appearances on radio shows	4 per year		
DML (Distributed Media Lab) widgets that are "Powered by EdSource"	On at least 10 sites around the state and country		
EdSource staff invited to education conference panels	At least 2 by 2025		
EdSource press releases highlighting award-winning work and collaborations	At least 4 per year		
Internal Strategy 2: Grow capacity in measurement and learning			
Membership model up and running	By 2024		
Increase donors who donate \$10K or more	10 new donors at this level by 2025		
Secure a major donor (at \$50,000 or more)	Secured by 2025		
New national funders funding EdSource at \$100K per year each	2 by 2025		
Internal Strategy 3: Align funding model and internal capacity to new program strategy and growth			
New benefit policies supported by staff	Supported by at least 75% of staff		
Decrease staff turnover rate	Decrease by 33% compared to 2022		
HR/payroll system is integrated with greater automation	90% of staff cite satisfaction with onboarding and more efficient payroll process and protocols		
Increased capacity to manage donor relations	100% of development staff report increased capacity		
Staff have the life experiences, perspectives, and skills to report effectively on range of issues facing Californians	90% of staff report that they “strongly agree” with this statement		

 **EdSource**