

A Pragmatic Playbook for Impact

Direct, Widespread, and Systemic

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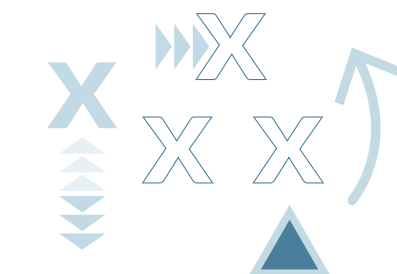
Envision Education/ Envision Learning Partners

Introduction

As outlined in [“A Pragmatic Playbook for Impact: Direct, Widespread, and Systemic,”](#) education entrepreneurs routinely grapple with how to close the gap between the scale of impact they can achieve through direct programming and their ultimate vision for change. Bridging between the two has become even more urgent as we emerge from the COVID-19 pandemic.

To move from a narrow theory of action to enacting a successful theory of population-level change, education entrepreneurs must consider working across three strategies for impact:

- **Direct Impact:** How an organization provides programming directly to its target beneficiaries.
- **Widespread Impact:** How an organization builds the capacity of partner organizations to replicate elements of its program model.
- **Systemic Impact:** How an organization shifts mindsets, relationships, and power to in turn shift the policies, practices, and resource flows that create stronger conditions for adoption of an organization’s values, program model, and its ultimate vision for change.¹



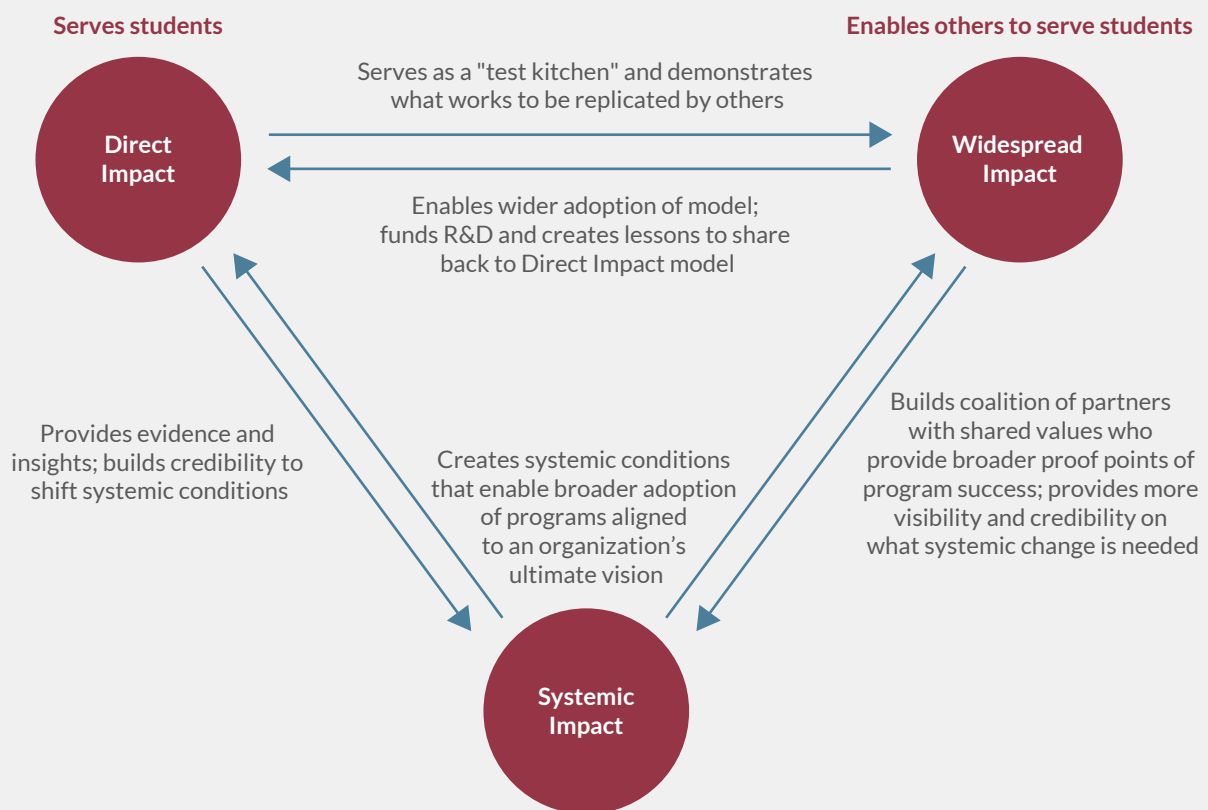
This is one of three case studies that accompany the report, A Pragmatic Playbook for Impact: Direct, Widespread, Systemic. Case studies of the other two organizations, Saga Education and uAspire, can be found on our website.

These impact strategies are not mutually exclusive but rather reinforcing and cyclical (Figure 1).

While education entrepreneurs and their organizations frequently begin in Direct Impact, many expand to work across all three over time. However, each strategy requires thoughtful consideration in design choices, resourcing, and impact measurement to ensure fidelity to an organization's vision, mission, and values.

Envision Education (Envision) and its division focused on Widespread and Systemic Impact, Envision Learning Partners (ELP), are leaders in student performance assessment and illustrate how a small, innovative charter school network's journey through Direct, Widespread, and Systemic Impact is helping this country rethink "what are our schools for?"

Figure 1 Reinforcing Benefits of Direct, Widespread, and Systemic Impact Strategies



Envision's Roots in Direct Impact

Founded in 2002 as a charter management organization, Envision upholds a mission to “transform the lives of students — especially those who will be the first in their family to attend college — by preparing them for success in college, career, and life.”²

Envision operates five charter schools in the Bay Area, serving 1,500 students in grades 6-12, and its academic model is characterized by strong teacher-student relationships, a vibrant college-going culture, and engaging project-based learning. A hallmark of Envision's model is its acclaimed [Portfolio Defense performance assessment](#) that challenges learners to make and support claims about targeted skills by curating their work into a portfolio for an evaluated presentation. Students stand before a panel of teachers, peers, and community members in a master's-like defense to tell the story of their education and respond to critical questions from the panel demonstrating how and why they're ready for the next academic challenge.³

Looking Beyond Direct Impact Work at Envision

The Envision schools network was originally formed as part of the small schools movement, supported by funding from the Bill & Melinda Gates Foundation.⁴ As Envision considered growing its small network in the early 2000s, ELP Executive Director Justin Wells noted that the network “was originally founded to bear out a particular model, and first and foremost, I think we just realized that we really needed to get our model right.”

However, by 2010, Wells noted: “People were knocking on the door, interested in our model — the Envision Learning Partners concept grew organically out of that. We began to think that maybe we can expand our ideas through a consulting concept,” rather than growing the network directly. Part of this confidence stemmed from two opportunities happening around the same time:

- Envision had a relationship with Stanford University, which generated a handful of reports and case studies highlighting its model. Wells acknowledged, “At the time, this gave us the courage to feel like we were really onto something.”
- Envision successfully tested the waters of Widespread Impact by supporting a charter school in Hawaii that wanted to incorporate Portfolio Defense while also maintaining some of the things it held sacred (more on this below).

Additionally, through grant funding from the Hewlett Foundation to support Envision's facilitation of a “Deeper Learning” community of practice, Envision now had staff dedicated to exploring external dissemination of its work.⁵

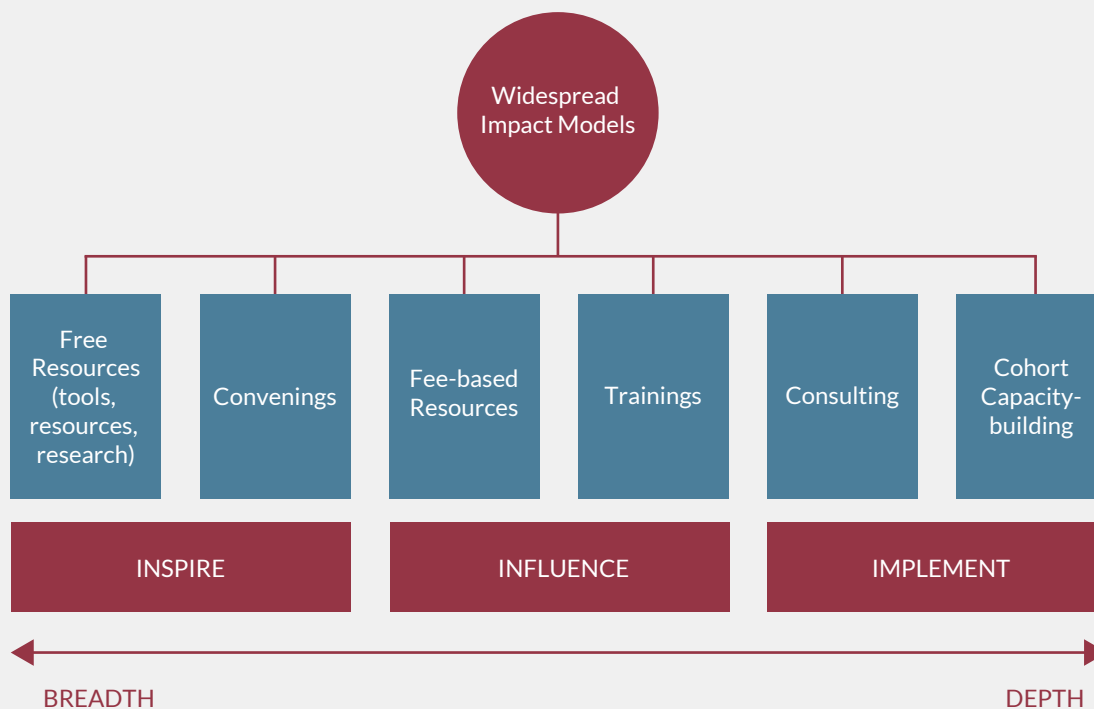
From there, ELP officially launched to drive Envision's Widespread Impact strategies.

ELP's Approach to Widespread Impact

There are a range of Widespread Impact models that organizations can consider (Figure 2). These are not mutually exclusive, and many organizations' Widespread Impact models are mutually reinforcing. Some organizations start and concentrate on one model, while others immediately or eventually expand to a suite of Widespread Impact options.

ELP is a case study in how an organization begins in the depth end of the spectrum (Figure 2, Implement) but expands to a greater range of breadth and depth models over time.

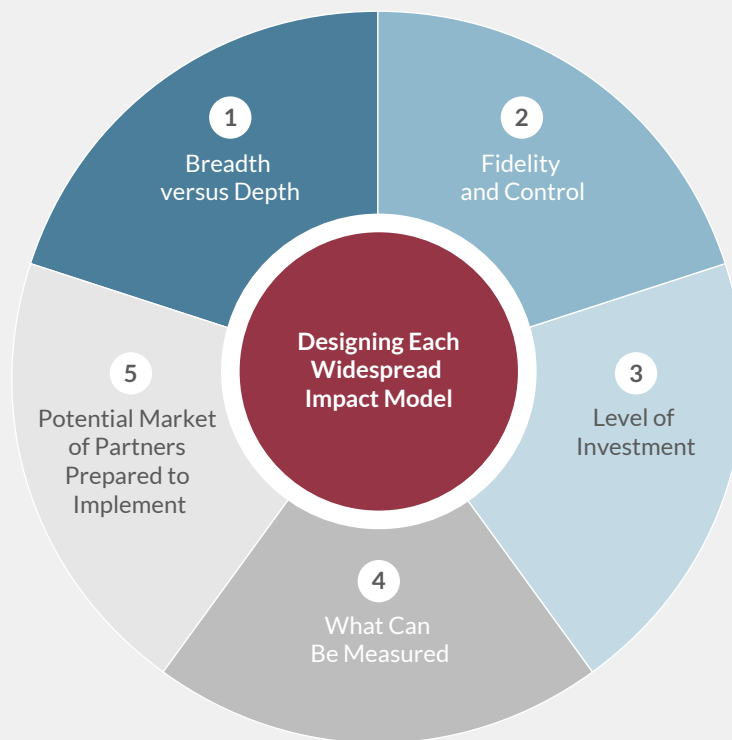
Figure 2 > Widespread Impact Models



ELP's initial Widespread Impact model was one-to-one consulting with schools and districts on how to adopt the Portfolio Defense performance assessment model in their own local context.

As organizations consider which Widespread Impact offerings to adopt, they must grapple with five trade-offs (Figure 3). Here is how ELP grappled with each decision in designing and implementing its consulting model:

Figure 3 Five Decisions in Designing Each Widespread Impact Model



- 1 Breadth versus Depth:** Part of what spurred Envision’s entry into Widespread Impact was demand from other schools and districts — and while Envision schools represent a strong whole-school model, the primary interest was in its Portfolio Defense performance assessment work. It helped that this piece of Envision’s model was (1) meaningful to student outcomes, (2) adoptable by a range of school types (i.e., not charter-specific), and (3) inherently customizable to local community context. In response to this demand, ELP believed that hands-on, one-to-one consulting was the best way to initially support other schools and districts through Widespread Impact work. Wells noted ELP began by “just getting on an airplane and showing up to do professional development — sometimes at the teacher-facing level, sometimes coaching leaders, but usually a blend of the two. And we were good at that, so we began slowly but surely adding clients.”

Envision considered greater depth models, or even creating a larger network of Envision-branded schools. However, in considering the market, many other organizations already offered whole-school models and lacked lower-investment, more flexible options for partners that would still generate meaningful outcomes.

- 2 Fidelity and Control:** While ELP's goal was to drive student impact, which requires some degree of fidelity to its model, it could not just dictate implementation. Wells noted: "I'm not very interested in 'fidelity.' It has to do with the nature of our work — a high-quality performance assessment system has to be pretty contextualized. Some of our first clients were charter schools that were committed to the preservation of native Hawaiian culture in addition to preparing students for college and career. I realized that people were interested in our Portfolio Defense system in part because it was so adaptable to their particular context, which was very different than ours. When I saw students defending their learning in native Hawaiian before a panel of community elders, the concept of fidelity suddenly went out the window. They were taking this in ways that I had never even imagined and were just beautiful."

ELP also understood that to generate partner buy-in (which leads to strong and lasting implementation), it needed to allow for flexibility and partner-level ownership. For example, one ELP district partner was defining its graduate profile, and Wells recalled: "I looked at their draft and thought, maybe if I were running the place, I might have a few changes I'd make to the language, but I want them to feel like they own this. I want them to be able to say, 'We came up with this, this is ours, and we're sticking with it.'"

ELP designed an approach that leads to successful and lasting implementation by partnering with districts for up to two to three years. This allows sufficient time for districts to learn, build, and implement — and gives time for the ELP team to observe progress and run quality checks.

- 3 Investment:** ELP considered both its own ability to invest as well as partners' willingness and ability to invest in this work:
 - a. Envision investment:** Considering that Envision's primary revenue source is per-pupil state funding, ELP needed to be self-sustaining (or even generate revenue contributions for Envision's schools). ELP had an initial investment from the Hewlett Foundation to facilitate a deeper learning community of practice, which created early capacity around external dissemination work. Additionally, because ELP is grounded in a well-established approach within Envision schools, little upfront investment was needed to begin coaching partners on the model.
 - b. Partner investment:** ELP is conscious of school and district ability to invest — considering both the many competing priorities and funding needs, and the fact that budgets are revisited annually, which makes it difficult to commit to multiyear contracts. In response, ELP provides partners a lower-commitment onramp into this work while hoping that initial interest and early results lead to multiyear partnerships to strengthen and solidify the approach within partner schools.

4 Measurement: Wells didn't anticipate that measurement was going to be a limiting factor for ELP due to the nature of Portfolio Defense: "Just by jumping on that airplane, we could see our impact. We could measure by observing the kids doing something different by the end of the term of the contract (which is not hard to do in performance assessment work), and we can say that happened because of our collaboration with that school district."

However, like many organizations, ELP experienced challenges and growing pains associated with measuring student outcomes in Widespread Impact. Wells acknowledged: "We haven't been able to find a way to say, 'Of all the things that are happening in your school, your performance assessment system was responsible for X or Y outcomes.' There are so many variables at play."

However, ELP can still measure a range of inputs, outputs, and outcomes associated with its Widespread Impact work (Table 1).

Table 1 Examples of ELP's Widespread Impact Measures

Inputs	Investment in time, talent, and money	<ul style="list-style-type: none"> Allocation of staff and resources to ELP.
Outputs	Reach and engagement	<ul style="list-style-type: none"> Number of clients served. Number of touchpoints per client.
Outcomes	Satisfaction	<ul style="list-style-type: none"> Net Promoter Score (a measure for customer experience and satisfaction).
	Knowledge Attitude Action	<ul style="list-style-type: none"> Given that ELP is staffed by experts in Portfolio Defense, the team can use its experience to look for evidence of key practices through observations while on the ground with partners. ELP also monitors whether partners maintain their performance assessment systems after ELP has come and gone.

Additionally, from a financial perspective, ELP tracks earned revenue. ELP has significantly grown its revenue from paying partners from 20% of its revenue to approximately 80%, signaling demand and satisfaction for its work and helping to support ongoing financial sustainability.

- 5 Target Market of Partners Prepared to Implement:** As noted above, ELP considered how it could best serve schools and districts given what was already available in the market. ELP determined that districts (versus individual schools) would be the best target partners. About this, Wells said: “We began moving from the school level to the district level. That was one of our first strategic choices – deciding that our ideal client was a district as opposed to an individual school or the state department of education.” This level of partnership struck a good balance between complexity to implement and scale of impact. Additionally, ELP found that professional development decision-making often sat at the district level.

Evolution of ELP’s Widespread Impact Strategies

Over time, ELP expanded its set of Widespread Impact offerings beyond one-to-one consulting with districts to offer more breadth and depth offerings (Figure 2).

- ELP’s breadth offerings (Figure 2, Inspire and Influence) include free resources (e.g., quality criteria documents, task design templates) and [blog posts](#) available on its website, monthly online informal “lounge” opportunities for educators to connect in community, and one-off trainings open to the public.
- ELP’s additional depth offerings (Figure 2, Implement) include two types of cohort programs:
 - > **District cohorts** that operate similarly to ELP’s one-to-one consulting, but for groups of districts in states that have adopted performance assessment as part of graduation requirements through ELP’s Systemic Impact work (more on this below).
 - > **The Deeper Learning Leadership Forum**, a roughly 18-month program sponsored by the Hewlett Foundation that convenes groups of 20 current or aspiring school system-level leaders to address an equity challenge in their network (utilizing performance assessment as part of the solution).

ELP began with consulting and added its additional depth programming because Wells knew that ELP “needed to continue to prove our model in a deep way.”

On the breadth end of the spectrum, Wells saw value in:

- **Impact potential:** “Not letting perfect be the enemy of good ... I often notice in education a tendency to feel like we have to get everything right before we try something ... but I think people underestimate how transformative even one deep learning experience can be for a student. It can have a pretty big impact on teachers and school leaders who witness it.”
- **Potential reach:** “At some point, there’s the pure numbers of it. How can we take advantage of the fact that there are a growing number of leaders out there that feel like they should be providing something more memorable or deeper for students?”

- **Generating interest in depth offerings:** “I see spreading the concept of Portfolio Defense performance assessment as sort of like tilling the fields for potentially deeper work that could happen down the line.”

Ultimately, the full spectrum of Widespread Impact models offered are vital to achieving ELP’s larger vision to “build a diaspora of people that identify with this work. I’m very interested in what happens when educators start to see ‘assessment expert’ as part of their professional identity,” said Wells.

The Role of Technology in ELP’s Widespread Impact

While ELP was happy to continue hopping on airplanes to meet partners face-to-face, Wells found that “a lot of times, the bottleneck for districts was not the cost of services but rather the amount of time leaders and teachers have to do professional development.” This motivated ELP to explore how to do the work virtually (even before the pandemic) in a way that enabled more flexibility for partners while maintaining high quality.

ELP sees potential to leverage technology to support both breadth and depth Widespread Impact models in the following ways:

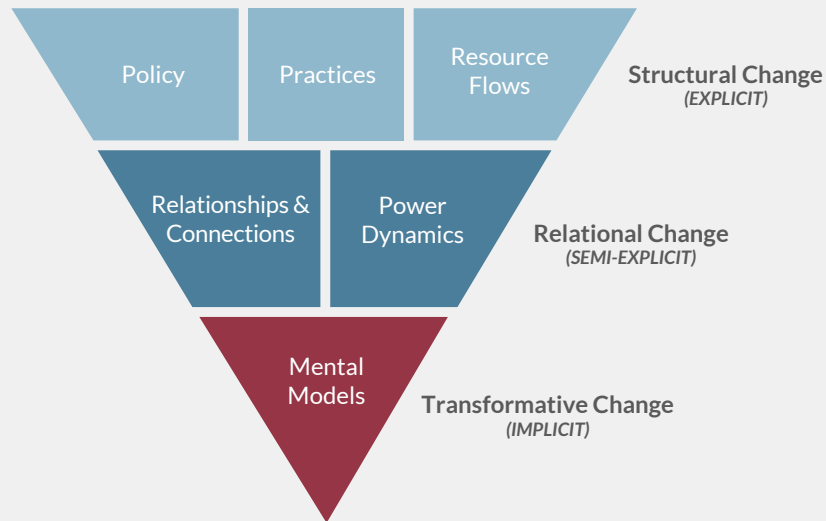
- Across all models, technology reduces cost and effort required to deliver.
- On the breadth end, technology unlocks potential to reach more audiences through options like one-time virtual workshops.
- On the depth end, ELP sees opportunity to supplement current levels of engagement with additional low-cost, low-effort virtual touchpoints, ideally increasing partner outcomes.

ELP’s Journey Into Systemic Impact

ELP sees its Portfolio Defense model as driving systems-level change — shifting mindsets through to policies and practice (Figure 4).⁶ Its evolution over time has been to implement change within increasingly larger systems.

At the individual school level, adopting a Portfolio Defense performance assessment approach requires shifting mindsets of what success means and looks like (Figure 4, Mental Models), changing relationships and power dynamics between students and teachers/administration (Figure 4, Relationships & Connections; Power Dynamics), and, ultimately, changing policy and practice at a school (Figure 4, Policy; Practices; Resource Flows).

Figure 4 Six Conditions of Systems Change



Source: John Kania, Mark Kramer, and Peter Senge, “The Water of Systems Change,” fsg.org, May 2018.

Rooted in this thinking, ELP is now pursuing systems change work at the state and national policy levels and within higher education. Wells reflected on the ultimate goal driving ELP’s work: “Our work is basically fighting to expand the notion of what student success is about. I think the bar of what many schools offer kids is so low compared to human potential. And I find that thinking about performance assessment is a very powerful lever for this mental model ... We’ve been down in the bottom of the [Figure 4] triangle figuring things out over the last decade and are increasingly awakening to the fact that this is about mental model shifting, and that that can start to change some of the bigger dynamics at play.”

ELP continually reflects on the following questions in designing and executing its Systemic Impact strategies (Table 2):

Table 2 > ELP’s Systemic Impact Strategies

1. Which systems?	State policy	National policy	Higher education
2. What change do you seek?	Redefine readiness for college and career, and incorporate performance assessment into graduation requirements.	Influence prioritization of performance assessment via resource and funding flows.	Reimagine college access and application requirements to incorporate performance assessment.
3. How is that change achieved?	ELP partners directly with state education agencies (SEAs) to redesign their high school graduation requirements to allow Portfolio Defense as an indicator of college readiness alongside traditional measures (e.g., SAT, ACT).	ELP provides a practitioner voice and shares stories about the power of performance assessment with a goal of influencing laws that direct resource flows.	ELP is designing a type of common application that would include portfolios of student work alongside measures like GPA.
4. Who else needs to be involved?	ELP leads this work directly with SEAs but acknowledges that schools are the ones that must implement the change. Changes at the systems level open the door for ELP to work with districts on implementation.	ELP does not see national policy or lobbying as one of its core competencies and therefore relies on outside experts to drive the work (such as the Aurora Institute).	ELP got involved in this work through Learning Policy Institute’s Reimagining College Access work.

How Envision and ELP Use Direct, Widespread, and Systemic Impact Strategies to Reinforce One Another

Envision’s deep expertise and track record of Direct Impact success paved the way for ELP’s Widespread Impact model and is seeding the ground for the organization’s Systemic Impact work.

Over time, growth in ELP’s Widespread Impact model helped attract attention among statewide policymakers and gave ELP a bigger platform to advise on state policy as part of its Systemic Impact strategy. Wells noted, “We’ve become so well versed in [understanding district needs and challenges from our] Direct and Widespread Impact work that we have become a practitioner voice in an increasing number of policy conversations.”

In turn, ELP's success at the Systemic Impact level has opened the door for more partnerships via its Widespread Impact work. For example, in Colorado, ELP informed state policy around high school graduation requirements and is now supporting a cohort of districts to build capstone programs and performance assessment systems aligned to this policy.

While ELP's primary focus is not on Systemic Impact work, Wells admitted, "I've learned it is valuable for me as an executive director to spend some of my time on things that might have Systemic Impact — because when it does work, it greases the skids for the actual work, the work we like to do and do best back at the local level."

Organizational Implications of Envision and ELP's Expansion Into Widespread and Systemic Impact Work

Expansion into Widespread and Systemic Impact work comes with new challenges for an organization, including implications for its structure and culture.

In its early Direct Impact-centric days, Envision's school staff were involved in delivering early forms of Widespread Impact, such as attending conferences, opening their doors to researchers, or hosting documentary film crews in Envision classrooms. However, once ELP launched as its own division in 2010, Wells recalled that a clearer line was drawn between roles and responsibilities on the Direct Impact schools team (Envision) versus the Widespread Impact team (ELP): "As soon as we put a name and boundary around the external work, that public-facing culture in our schools started to dissipate."

Over time, this led to a weakened understanding of ELP's origin story and purpose for members of Envision's school-based teams. And on the ELP side, Wells noted, "The busier we got and the more airplanes we were jumping on, the harder it was to stay grounded with what was happening at our own schools."

Wells reflected that this tension naturally ebbs and flows over time (in part based on how busy each team is). Envision and ELP addressed these tensions by intentionally investing in robust, transparent internal communications and ensuring both teams regularly share new learnings and insights with each other.

Aside from cultural tension, Wells also acknowledged tensions that arise when leadership needs to make resource allocation decisions across teams. Envision and ELP each have slightly different missions: Envision's schools are designed to best support the students they serve, whereas ELP is focused on serving as many students as possible. Wells provided an example of what this tension might look like in practice: "If we have \$300,000, how do we make the choice to invest in marketing or a new website for our consulting services if we aren't happy with our students' math scores?"

Wells said he believes this tension can be a good thing — it helps keep the organization honest in how it prioritizes and forces creativity.

ELP's Reflections for Leaders Beginning the Journey to Widespread and Systemic Impact

Here are Wells' lessons learned from ELP's journey into Widespread and Systemic Impact:

Find your niche and stick with it: "Especially in the nonprofit world, it's important to distinguish your role within larger change efforts. Rather than duplicate something that someone else is doing well, focus and get better at what you do uniquely. Coordinate with others who complement what you do."

Insist on the quality of student work as the deliverable of your service: "Even if your work is once or twice removed from the students themselves, changes in what students do or produce is the honest reckoning of impact."

Trust in the long game: "Influencing education is like teaching students. Sometimes it takes years for your impact to be observable. It's OK to get impatient. But it's not OK to give up because education moves too slow. Trust that if you stay the course for many years, you will see evidence of your influence."

ELP's Journey of Impact Continues

Reflecting back, Wells shared: "That's what I love about this work — I found a way for this technical service provider to be engaged in a deeply philosophical conversation that this country is poised for right now: What are our schools for? ... Our work across all three of these impact strategies is a fight to expand the notion of what student success is about, not only to raise the bar, but also to give students more ways to reach it."

While still early in its journey into Widespread and Systemic Impact, ELP has already seen significant impact growth by expanding beyond Direct Impact work. In the 2021-22 school year alone, ELP is providing fee-for-service consulting to 45 schools and districts across 12 states employing 21,000 teachers and serving 360,000 K-12 students. And since its inception in 2010, ELP has influenced policy change at five SEAs, impacting high school graduation requirements for students across those states.

ELP's thoughtful approach to partnerships and its strategic approach to mutually reinforcing Direct, Widespread, and Systemic Impact work positions it well for future growth and impact at scale.

Endnotes

- 1 John Kania, Mark Kramer, and Peter Senge, "The Water of Systems Change," fsg.org, May 2018, https://www.fsg.org/resource/water_of_systems_change/.
- 2 "Our Mission," Envision Schools, <https://envisionschools.org/about/>.
- 3 "Our Mission," Envision Schools, <https://envisionschools.org/about/>.
- 4 Marie Groark, "3 Million Grant to Launch Network of Charter Schools in Northern California," Bill & Melinda Gates Foundation, <https://www.gatesfoundation.org/ideas/media-center/press-releases/2003/05/grant-to-launch-new-charter-schools-in-san-francisco#:~:text=SAN%20FRANCISCO%20%2D%2D%20The%20Bill,the%20San%20Francisco%20Bay%20Area>. In the early 2000s, Envision was one of several grant recipients who were a part of "Bill & Melinda Gates Foundation's nationwide effort to improve graduation rates, particularly among African Americans and Hispanics, by making high schools stronger and smaller."
- 5 "Deeper Learning Defined," Hewlett Foundation, April 23, 2013, <https://hewlett.org/library/deeper-learning-defined/>.
- 6 Kania, Kramer, and Senge, "Water of Systems Change," https://www.fsg.org/resource/water_of_systems_change/.

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About Bellwether Education Partners

Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice.

Bellwether envisions a world in which race, ethnicity, and income no longer predict opportunities for students, and the American education system affords all individuals the ability to determine their own path and lead a productive and fulfilling life.

About New Profit

New Profit is a venture philanthropy organization that backs social entrepreneurs who are advancing equity and opportunity in America. New Profit exists to build a bridge between these leaders and a community of philanthropists who are committed to catalyzing their impact. New Profit provides unrestricted grants and strategic support to a portfolio of organizations led by visionary social entrepreneurs to increase their impact, scale, and sustainability. It also partners with social entrepreneurs and other cross-sector leaders to shift how government and philanthropy pursue social change to ensure that all people can thrive. Since its founding in 1998, New Profit has invested over \$350 million in 130+ organizations and, through the America Forward Coalition's collective advocacy efforts, has unlocked over \$1.7 billion in government funding for social innovation.



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