

THE HUNT INSTITUTE'S **2021-2024** **STRATEGIC PLAN**

LETTER FROM THE PRESIDENT

Dear friends, partners, and Board of Directors,

I am pleased to share with you The Hunt Institute's new 2021-2024 Strategic Plan, which identifies a full scope of reach for The Institute's work over the next three years and incorporates feedback from all Institute constituents, including our team, partners, and Board of Directors. I want to acknowledge and offer my sincere thanks to our Board of Directors and team, all of whom invested their time, leadership, and guidance in the development of our strategic plan. This three-year plan builds off our previous plan and positions us to continue our work and aspirations to be the "go-to call for policymakers on education," The Institute's central focus and overarching theme of our work.

The importance of what we do has become that much more apparent in the midst of the COVID-19 pandemic. With education disrupted across the country in ways great and small since March 2020, policymakers have needed to be quickly brought up to speed on the issues affecting the continuum. The Hunt Institute is demonstrating its longstanding ability to adapt and respond to the policy needs of elected leaders.

While our traditional methods of in-person service delivery have had to take a back seat over the past few months, research suggests that the demand for expert, nonpartisan, evidence-based education policy guidance will remain strong. Our guidance will be critical as policymakers work first to address this unprecedented public health challenge and then to address its aftermath in what is likely to be a decidedly different economic climate. Thus far, The Hunt Institute has responded quickly to the need for information by developing policy considerations on issues relating to the entire education continuum, making them publicly available on our website, and has helped guide us in the development of this strategic plan.

As always, thank you for your guidance, leadership, and thought-partnership. We look forward to working closely with you to ensure that together we equip and empower educators and policymakers to drive equitable reforms and become audacious champions for education.

Best,



JAVOID SIDDIQI, PH.D.
President | The Hunt Institute

TABLE OF CONTENTS

1 *Executive Summary*

1 *Mission & Vision*

2 *Goals*

4 *Overview*

6 *Strategic Approach*

8 *Development
& Fundraising*

9 *Governance*

EXECUTIVE SUMMARY

The Hunt Institute has made great strides over the past 20 years in support of providing an equitable education to every child. Deliberately and with care, The Institute has built its reputation for providing unbiased, unparalleled, and expert research on topics spanning the full education continuum. To continue its growth trajectory, The Institute must continue building its reputation on a larger scale, to become the go-to call on education for not just a select group of policymakers, but for those across the country.

The 2021-2024 Strategic Plan lays out the goals and objectives that will guide the support of The Hunt Institute's overarching goal of becoming that go-to call. Our aim in developing this plan is to ensure that anyone, whether getting to know The Institute for the first time or already deeply familiar with our work, can immediately understand what The Institute stands for and why we do the work we do.

Specifically, this document lays out the mission and vision of The Hunt Institute, followed by three goals (and the associated strategies for achieving each of them), which will keep us accountable and focused as we move through this next phase of The Institute's development. We then provide an overview of The Institute – where it has been, where it is now, and where it hopes to go in the future. Following the overview is a brief summary of our policy focus areas:

- Early childhood
- Teachers
- School leaders
- Standards & assessments
- Postsecondary & the workforce

The report concludes with a review of the past and present of The Hunt Institute's fundraising and development activities, and information on the organization's governance.

MISSION & VISION



Mission

To provide unbiased research, technical expertise, and learning opportunities that equip and empower educators and policymakers to drive equitable reforms and become audacious champions for education.



Vision

An equitable American education system through which all learners achieve their highest potential in school and life.

The Hunt Institute's organizational goal: be the go-to call for policymakers on education

2021-2024 STRATEGIC PLAN GOALS

GOAL 1 PRIORITIZE EQUITY AND EQUITABLE OUTCOMES IN OUR THINKING, PLANNING, RECRUITMENT, POLICIES, AND PARTNERSHIPS

GOAL 2 OPTIMIZE PROGRAMMING AND OUTREACH

GOAL 3 EXPAND OUR PROFESSIONAL NETWORKS, PARTNERSHIPS, AND SERVICE OFFERINGS

GOAL # 1: Prioritize Equity And Equitable Outcomes In Our Thinking, Planning, Recruitment, Policies, And Partnerships

Equity lies at the heart of all the work that The Hunt Institute does, both in its internal and external work. In order to achieve its vision of creating an equitable American education system, The Institute must first focus on its own leadership, policies, and processes to create an organization that is uniformly focused on diversity, equity, and inclusion (DEI). The Institute is committed to continually reviewing and revising its own processes and protocols, as well as developing the requisite tools, to ensure a continued and holistic emphasis on DEI throughout the organization.

In support of this goal, The Hunt Institute plans to implement the following strategies:

- Engage and educate Board and staff on issues of racial equity and explore opportunities to affect change within the realm and reach of our work both internally and externally.
- Develop employee-focused DEI initiatives in efforts to cultivate a culture of belonging, meaningful engagement, and high standards of excellence.
- Create a DEI framework and toolkit for Board and staff to help ensure cohesion and synergy around DEI-related organizational standards, positioning, messaging, and programming.
- Organize and implement processes for creating a central repository of accurate and up-to-date disaggregated demographic data to help frame opportunities to address inequities, disparities, and disproportionate outcomes.
- Design and deploy protocols to ensure diversity of perspectives, cultures, life experiences, and geographic reach is fully leveraged throughout the Board, staff, programming panels, participants, topics, platforms, audiences, and perspectives.
- Develop tools to help plan, monitor, and continually improve operational and workforce equity to include Board and staff recruitment, retention, professional development, vendor and panel selection, resource allocation, employee work plans, and performance evaluation.

GOAL #2: Optimize Programming And Outreach

In order to achieve its vision and mission and honor the legacy of Board Chair and Founder Governor Jim Hunt, The Hunt Institute is committed to continuous improvement across its programming and outreach. In an effort to grow its reach, influence, and impact, The Institute will regularly evaluate its programming to ensure that it is effective, aligned with its DEI efforts, and targeted to the appropriate audiences. Additionally, The Institute is committed to providing opportunities for its staff to broaden and develop their expertise in order for The Institute to expand into new areas and elevate existing ones.

In support of this goal, The Hunt Institute plans to implement the following strategies:

- Expand the breadth and depth of expertise of staff to meet the various needs of key audiences.
- Re-examine and re-identify our key audiences to ensure programming, solutions, marketing, and communications are all relevant and effective.
- Evaluate processes for disaggregating, analyzing, and monitoring the efficacy and accessibility of our programs to help drive interdepartmental planning and coordination.

- Increase opportunities to leverage and nationally promote the team's depth of expertise and evidence of the efficacy of The Hunt Institute's programs, services, and outcomes relative to stronger education policy.
- Explore new opportunities to grow the reach, type, and impact of programs and services offered by The Hunt Institute.
- Develop and implement a comprehensive succession plan designed to ensure the continual legacy of Governor Jim Hunt, intentional and sustainable growth, leadership excellence, and long-term financial health.

GOAL #3: EXPAND OUR PROFESSIONAL NETWORKS, PARTNERSHIPS, AND SERVICE OFFERINGS

Throughout its 20 years of existence, The Hunt Institute has been fortunate to build robust relationships with many diverse partner organizations. The COVID-19 pandemic has brought about new types of programming, such as five national webinar series, that have allowed the deepening of existing relationships and development of new ones. As the country deals with the effects of the pandemic as well as a racial reckoning, The Institute is poised to expand its work in school improvement, particularly as relates to educational equity.

In support of this goal, The Hunt Institute plans to implement the following strategies:

STRATEGIES:

- Leverage state and national relationships to grow our network of rising state leaders and policymakers and elevate our positioning amongst competitors.
- Build and strengthen relationships with local superintendents, local boards of education, charter school boards, school and district leaders, as well as community organizations and leaders.
- Develop effective, action-based partnerships with community organizations and leaders who represent populations facing disparities in order to assess critical areas of opportunity, advocacy, and transformation.
- Expand engagement and mutually beneficial thought-partnership with Historically Black Colleges & Universities (HBCUs) and Minority Serving Institutions (MSIs) to bolster a variety of DEI initiatives including community engagement, recruitment, professional development, HBCU cohorts, and platform innovation.
- Create opportunities for policymakers and practitioners/experts to collaborate and help mutually inform high-impact policy decisions.
- Continue to scale critical engagement models including the State Legislators Retreat (SLR) model, the fellowship model, the State Leader Transition Committee (SLTC) model, and the early childhood technical assistance model to increase our national footprint and brand recognition, as well as to increase and diversify state-based funding opportunities.
- Identify ways to deepen mutual support and engagement with existing partner organizations as well as the Hunt-Kean Leadership Fellows (HK Fellows) network. At the same time, continue to identify new funding sources, including the diversification of sources beyond private foundations to include additional corporate, governmental, or individual partners.

OVERVIEW

THE HUNT INSTITUTE

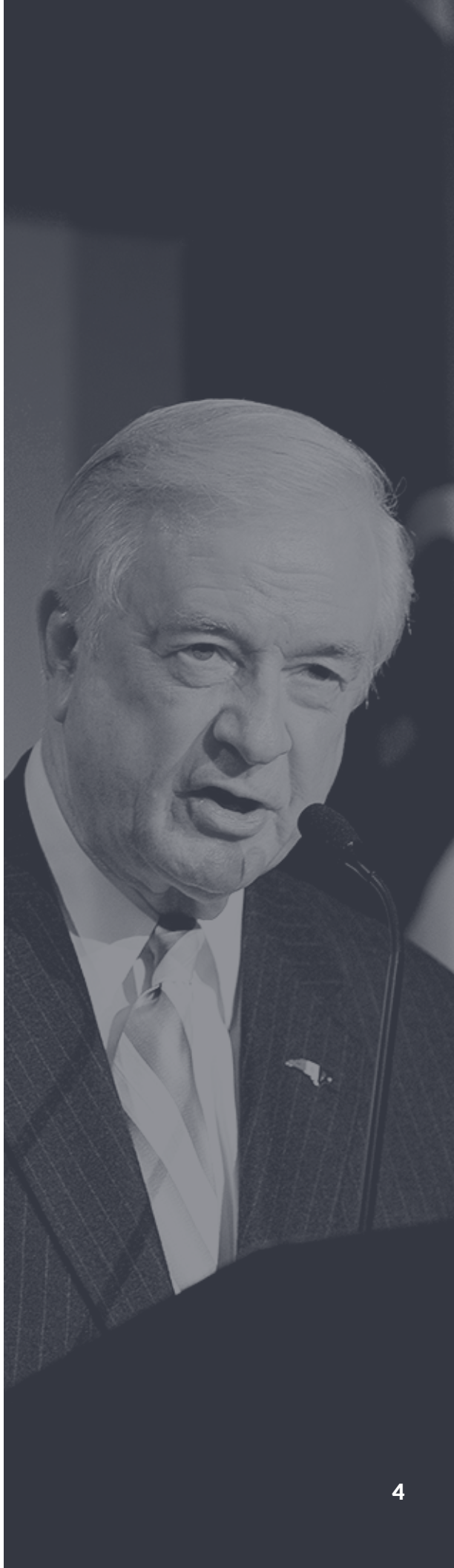
The Hunt Institute finds itself at an exciting inflection point in our history. In 2016, after 16 years as a nonpartisan leader in K-12 education policy and political leadership, The Institute evolved to broaden its policy focus to encompass the full continuum, from prenatal care and early childhood to postsecondary education and the workforce. In alignment with our core beliefs, The Institute creates meaningful platforms to engage policymakers across our work. We are unapologetic about the importance of equity—in educational access, quality, and opportunity—and it is at the core of the work we do.

In order to spur change that lasts beyond the next four or eight years, we must reach a saturation point in both the policy knowledge and political will within states. This work is best accomplished through intentional, continuous relationship and network building within states— and The Hunt Institute and its team excel in this space. By using our existing program platforms, including HK Fellows, the Governors Education Symposia, SLRs, SLTCs, candidate briefings, and cross-state convenings, we strive to improve policymaker understanding of potential policy considerations to improve education outcomes for all students.

The Hunt Institute was initially created by four-term North Carolina Governor Jim Hunt in 2001 to support governors' learning around education issues. Since our inception, we have expanded to work with other key political stakeholders, including state legislators, lieutenant governors, and other senior-level elected officials. Our platforms have helped to spur new thinking in the education field by providing opportunities for leaders across the country to share ideas.

One example of our potential to support change in education policy came when The Hunt Institute's 2007 Governors Education Symposium (GES) prompted consideration of the need for common, high-quality standards. The Institute then partnered with the National Governors Association to host the 2009 GES and, along with support from the Council of Chief State School Officers, made the case for higher standards. Following that meeting, governors across the country announced their commitment to new standards and The Institute led coordination efforts between dozens of partner organizations to support implementation of the standards.

The Hunt Institute has continued to work with partner organizations to amplify other important topics—including prenatal-to-three care, teacher workforce diversity, and structured pathways from high school to postsecondary. While the GES had demonstrated effects on policy, The Institute recognized its limited ability to influence thinking once governors had made campaign promises and championed specific issues. In response, The Institute launched the HK Fellows programs in 2014, which strategically selects up-and-coming political leaders who appear to be on a path to higher office. With six HK Fellows already serving as governor as of January 2021, The Institute has started to build a network of senior state leaders who see The Institute as a trusted resource, inviting us to provide briefings and feedback on education policy priorities.



The Hunt Institute has engaged with state legislators in North Carolina through the SLR model since its founding. Since 2015, The Institute has also strategically expanded the SLR model into four new states – Missouri, Virginia, West Virginia, and North Dakota – and implemented ongoing engagement through publications, policy dinners, and site visits. In 2019 The Institute added a dedicated Director of Early Learning and has seen its work in the early childhood policy space grow through both the integration of early childhood content across its core programs and technical assistance supports to a growing network of state teams.

Each platform on its own is capable of yielding measurable impact: states raised the rigor of K-12 standards after the 2009 GES; after attending The Hunt Institute’s 2019 Early Childhood Leadership Summit in partnership with the BUILD Initiative, a group of bipartisan Idaho lawmakers worked with Governor Brad Little (himself an HK Fellow from Cohort 1) to gain gubernatorial approval for a successful \$3.34 million Preschool Development Grant (Birth-Five) and issue an Executive Order creating the Idaho Early Childhood Advisory Council; and former Tennessee Governor Bill Haslam noted the impact that the GES had on his agenda, stating, “the Governors Education Symposium...actually sparked my thinking on a lot of the higher education issues I worked on as governor.” But this alone is not enough. By taking a comprehensive view to engage governors, legislators, and future governors, The Institute works to coordinate and concentrate our efforts within states to amplify and sustain our impact.

This theory of action is well underway in North Carolina and Virginia, and The Hunt Institute is in the early stages of scaling this work into several other states. This level of engagement is only possible because The Institute has demonstrated itself as a trusted partner. We see the HK Fellows program as providing the first opportunity to build personal relationships that follow the career of senior-level political leaders, allowing The Institute to provide additional programs and services. Cohort 4 HK Fellow Missouri Secretary of State Jay Ashcroft was a major advocate for bringing The Institute’s SLR model to Missouri. Our HK Fellows in Texas, New Mexico, Oklahoma, and Ohio have also expressed interest in the SLR model coming to their states.

Additionally, as the number of HK Fellows grows and they continue on their paths to higher office, we anticipate the number of successful gubernatorial candidates to also rise, allowing The Hunt Institute to serve as a continued resource through candidate briefings, Governors Education Symposia, and information requests.

We continue to expand our reach, enhancing all of our curriculum to include the entire education continuum, from early childhood to postsecondary and the workforce. Most recently we have created a K-12 division and hired a Director of K-12 to further our relationships with teachers and district leaders. Using the knowledge we have gained through 20 years of helping state leaders understand policy and political challenges and opportunities, The Hunt Institute is poised to build a bench of informed policymakers, nurture political leadership, and engage state policymakers on the full range of education policy issues. Together, we can further advance the important role The Institute serves in building a strong group of leadership at the state and local level that will create the change in education that our families and children not only desire but fundamentally deserve.

STRATEGIC APPROACH

POLICY FOCUS AREAS

The Hunt Institute has built a strong brand and reputation for providing clear and concise information around a core set of policy issues, including **early childhood, teachers, school leaders, standards & assessments, and postsecondary & the workforce**. Throughout our programming, equity will be a key lens through which we discuss education policy with our audiences, exposing them to persistent achievement gaps and inequity in both access and outcomes across their systems. These policy focus areas are essential for state policymakers to grasp, and they will remain at the center of our work over the next three years.

Early Childhood: The Hunt Institute recognizes the special importance of the early years, from prenatal to age eight, in supporting the long-term educational and life success of our nation's children. Early childhood content is infused across all of The Institute's core programming, exposing senior-level state elected leaders to high-quality early learning content.

The Hunt Institute provides ongoing technical assistance (including an annual Early Childhood Leadership Summit) to a growing network of state early childhood teams (27 states for 2021) with plans to continue expanding this number annually until we achieve national penetration, as well as specialized supports to early childhood caucus leaders from across the nation. Additionally, The Institute's SLTC model has proven to be of great value in the early learning space, with incoming state leaders in New Mexico and Alabama having already availed themselves of this service, and a third state poised to do so in early 2021.

Finally, The Hunt Institute's National Early Childhood Solutions Consortium convenes key system leaders (state-level early childhood secretaries, commissioners, and directors) regularly for peer-to-peer networking, conversation, and the identification of practical solutions to the challenges being faced by this specialized cohort of state policy leaders, with plans to continue expanding this work across the coming years.

Teachers: The Hunt Institute strives to include teacher voice in all programming so their experience and expertise can ground critical policy conversations around recruitment, retention, and teacher pay. Additionally, teachers know their students, and they know what high-quality learning looks like. The Institute values the input of teachers when it comes to supporting student needs and ensuring an equitable educational experience. By fostering a dialogue between policymakers and teachers, The Institute ensures that state policies are undergirded by the daily realities of education.

In addition, The Hunt Institute worked in partnership with the Office of North Carolina Governor Roy Cooper to facilitate the Developing a Representative and Inclusive Vision for Education (DRIVE) Task Force, charged with advising the Governor on strategies that would address matters of equity in education and inclusion in education in North Carolina, with a specific focus on increasing the diversity of the educator workforce. The Institute has committed to making similar teacher diversity efforts in other states as well and is constantly seeking out ways to engage state leaders on teacher diversity and inclusion.



Furthermore, educator preparation programs (EPPs) are one of the single most important determinants of the quality of a teacher's instruction, classroom management, and diversity and inclusion efforts. The Hunt Institute is committed to engaging legislators on the policies and practices surrounding the quality, curriculum, equity of access, accountability, and data measurement of EPPs in their states.

As The Hunt Institute continues to expand, new conversations around teacher policy and teacher quality of life are guaranteed to surface. The Institute will seek out new ways to engage policymakers and teachers and bridge the communication gap between the two.

School Leaders: The Hunt Institute works to support policymakers' understanding of the importance of school leadership by highlighting best practices and providing opportunities for direct engagement with school leaders and experts in the field of principal preparation and school leadership. Highly effective principals and school district leaders are critical to driving student achievement, and school leaders are estimated to account for one-fourth of school-based effects on student achievement, making them second only to teachers. In order to ensure that our schools have a strong supply of dynamic leaders who are adequately prepared for the demands of 21st-century schools, there is a growing need for innovation and improvement in principal recruitment, preparation, and professional development.

The Hunt Institute makes an effort to collaborate with school leaders wherever possible, and always seeks representation from at least one school leader in all of its programming. It is clear that principals and superintendents are often the most effective advocates when engaging policymakers on education and are crucial allies in creating state-level solutions for equitable education.

The Hunt Institute has recently scaled up its efforts to increase the leadership capacity and opportunity for superintendents and principals, whether through professional development via the newly formed K-12 division, or by engaging them in leadership opportunities such as Elevate NC: Higher Education. The Institute looks forward to growing its relationships with school leaders across the country and bridging the gap between the daily practices of school administration and effective policy to support that.

Standards & Assessments: The Hunt Institute has long championed the case for standards and assessments. At the 2007 GES, conversations spurred consideration of the need for common, high-quality standards nationwide, and at the 2009 GES The Institute made the case. Following that meeting, governors across the country announced their commitment to new standards and The Institute supported the coordination efforts between dozens of partner organizations to support implementation.

Since then, The Hunt Institute has continued to highlight the importance of high-quality and meaningful standards for all students in every school across the country, as well as the necessity for states to support districts in implementing those standards. The Institute is committed to working for standards and assessments nationwide that not only provide rigorous and equitable educational opportunities for students, but also give teachers and schools the supports they need to think creatively and in the best interest of their individual students when it comes to implementation.

One way The Hunt Institute has engaged in standards and assessments work is through our relationships with a number of state superintendents. In Missouri and Virginia, as new chief state school officers assumed their roles, The Institute facilitated statewide SLTCs that informed the superintendents' policies and priorities moving forward, including around equitable, innovative, high-quality standards and assessment.

Postsecondary & The Workforce: The Hunt Institute supports policymakers and practitioners who seek to help students access higher education, successfully pursue and attain a certificate or degree, and enter the workforce. These later stages of the education continuum are vitally important steps for ensuring that all members of our society are able to secure good jobs, enjoy a high quality of life, and support their families. In order to make progress toward these goals, The Institute administers two higher education leadership development programs – the Complete Tennessee Leadership Institute (CTLI) and ElevateNC: Higher Education – that cultivate champions of higher education. These annual programs convene cohorts of prominent stakeholders from a variety of backgrounds for a series of conversations with national and regional resource experts on a variety of higher education policy topics. Over the years, the networks associated with each program will grow as new cohorts are added, and alumni of these programs will take what they learn to drive change on higher education in their local communities.

In addition, The Hunt Institute has used its SLTC model to help develop broad stakeholder consensus on higher education policy priorities for state leaders who seek to develop multi-year agendas. As new state higher education executive officers (SHEEOs) transition into their roles over the next few years, The Institute will explore opportunities to expand implementation of the SLTC model into new states.

DEVELOPMENT & FUNDRAISING

For the first 14 years of The Hunt Institute's existence, The Institute was the beneficiary of significant funding from the State of North Carolina, which changed in October 2015 when the North Carolina Legislature removed The Institute from the State budget.

In response to this financial shift, and alongside the ascension of Dr. Javaid Siddiqi as The Hunt Institute's President & CEO in 2016, The Institute refocused its financial efforts on engaging a wider and more diverse network of philanthropic foundations and corporations. Since the drafting of the 2017-2019 Strategic Plan, **The Institute has engaged 28 new funding partners and reengaged four lapsed funding partners.**

As The Hunt Institute looks to this new Strategic Plan, The Institute and its team are focused on the following fundraising efforts:

- Continuing to identify new funding sources, including the diversification of sources beyond private foundations to include additional corporate, governmental, or individual partners;
- Maintaining engagement with current funders to ensure grants are renewed and, when possible, grown; and
- Implementing a fundraising and donor management system to support the growing volume of funding partners.

GOVERNANCE

- The Hunt Institute is governed by The Institute's bylaws.
- Board of Directors: The Hunt Institute's Board of Directors represent the very best in education, gubernatorial leadership, business, civil rights, and nonprofits. But above all else, these leaders have shown their steadfast commitment to education in America. Historically, The Institute has utilized its Board members through name recognition and expertise, as well as mission-based leadership and strategic governance. As The Institute looks to the next three years, the team is focused on continuing to take Board stewardship to the next level through greater hands-on involvement. We know that when Board members are truly engaged, they become an organization's best ambassadors, advocates, and strategists.

Board of Directors (As of January 2021)

- The Honorable James B. Hunt, Jr. | Board Chair | Governor of North Carolina (1977-1985;1993-2001)
- Thomas Lambeth | Vice Chair | Director Emeritus | Z. Smith Reynolds Foundation
- Samuel Houston, Ed.D. | Treasurer | President | NC SMT Center
- The Honorable Howard Lee | Secretary | Founder | Howard N. Lee Institute
- The Honorable Roy Barnes | Governor of Georgia (1999-2003)
- Randy Best | Founder & Board Chair | Best Associates
- The Honorable Don Carcieri | Governor of Rhode Island (2003-2011)
- Andy Cole | Education Consultant | The Wallace Foundation
- Mimi Clarke Corcoran | President | National Center for Learning Disabilities
- The Honorable Walter Dalton | President | Isothermal Community College
- The Honorable Mitch Daniels | President | Purdue University | Governor of Indiana (2005-2013)
- The Honorable Jim Douglas | Governor of Vermont (2003-2011)
- Robert Eaves, Jr. | Principal | The Right Stuff Food Stores
- Joel Fleishman | Professor | Duke University
- The Honorable Laura Fornash | Virginia Secretary of Education (2011-2013)
- Denise Forte | Senior Vice President | The Education Trust
- Maurice "Mo" Green | Executive Director | Z. Smith Reynolds Foundation
- J. Jackson Hoke | Executive Director, North Carolina School Superintendents Association
- Robert Ingram | Partner | Hatteras Venture Partners
- Dr. Judith Kelley | Dean | Sanford School of Public Policy | Duke University
- The Honorable Michael Lee | North Carolina Senator (2014-2018, 2021-Present)
- The Honorable Jamie Woodson | Executive Chairman & CEO | TN SCORE

