

# Strategic Plan

2023–2028



**edtrust** | **25**  
WEST YEARS

# A LETTER FROM *Our Executive Director*

In 2023, when we released our Strategic Plan, we highlighted how the word “unprecedented” attempts but does not fully capture the impact of the COVID-19 pandemic and subsequent years on our schools, colleges, and lives. In many ways, the term ‘unprecedented’ remains apt for describing the education policy landscape. The pushback on equity initiatives, the confusing and frustrating ping-pong of attempts to restrict funding, followed by court decisions and more, all make the process of implementing policies and student success efforts unnecessarily cumbersome and filled with worry and uncertainty. Yet there are also ways in which the climate we are currently in harkens back to other moments in the history of both our nation and our state when periods of progress were followed by efforts to roll back the forward momentum of equality and equity. What was true in those moments remains true in this one: the fight continues.

For a quarter of a century, EdTrust-West has worked in partnership and alongside each of you, fighting this good fight. While we rarely say it, our work together to advance racial equity in education has always been an uphill battle, even in a state like ours that pretends to be in alignment with our more equitable and just vision for the future. We know how to fight uphill, we know how to dream, we know how to come together, we know how to lift our voices, and we know that this moment will not last forever.

As EdTrust-West celebrates its 25th anniversary, we have decided to extend our existing strategic plan, with a few revisions, rather than drafting a new one. The issues we originally outlined in 2023 are steadily gaining momentum, and we are eager to continue that work. We are also at a crucial moment in our state’s trajectory. Our public colleges and universities have new leadership. In 2026, Californians will elect the next Governor, Lieutenant Governor, and State Superintendent of Public Instruction - three roles with significant responsibilities concerning the TK-12 and higher education systems in our state. In extending our strategic plan, we aim to use this moment to solidify the attention, investments, and implementation of the policy issues we outlined two years ago and continue to advance our organizational sustainability and growth efforts.

Much of what we said when originally launching this plan remains true about how we will continue to move forward. We will continue to use data as a foundational element of our advocacy and as a collective launching pad for supporting advocates around the state. We will center the voices and experiences of students of color and multilingual learners as we ensure curriculum and instruction in all education sectors are culturally and linguistically affirming. And our policy work will prioritize the most crucial changes and impactful implementation efforts in creative and engaging ways. This next chapter of EdTrust-West also involves bringing more Californians into the fold. We will seek out opportunities to reach a wider audience of potential equity champions and to galvanize these new advocates in the service of what is right and just, in the service of improving our education systems and institutions.

Lately, I’ve been reminding folks of something true, but often left out of the mainstream conversations about equity in education. Equity is about student success. Equity initiatives aren’t about limiting opportunities for anyone, but are instead about making sure everyone can succeed in systems that were originally designed otherwise. In California, this means making sure our elected officials, our campus and community leaders, and our coalitions of advocates across the state are working together to put our money, our time, our attention, and our steadfastness where our mouths are. These are times for us to stay committed to the courage of our convictions. We’re eager to keep the momentum going, and we hope you join us.



Onward,

A handwritten signature in black ink that reads "CJ Nellum". The signature is fluid and cursive, with a long horizontal stroke at the end.

Dr. Christopher J. Nellum



## Mission

EdTrust-West is committed to advancing policies and practices to dismantle the racial and economic barriers embedded in the California education system. Through our research and advocacy, EdTrust-West improves racial equity in education, engages diverse communities dedicated to education equity and justice, and increases political and public will to build an education system where students of color and multilingual learners, especially those experiencing poverty, will thrive.

# Our Vision

We envision a California where education equity is baked into every policy and practice decision, and where students of color and multilingual learners, especially those experiencing poverty, are fully supported academically, affirmed in their school or college community, and equipped to pursue any educational, career, and livelihood options they choose.

## The Students We Prioritize

We prioritize students of color and multilingual learners, especially those experiencing poverty – including those from Black, Latinx, Asian American, Pacific Islander, and Native American communities.



# Our Values



## Community

We partner with the community to elevate the experiences and voices of families, students, and educators.



## Justice

We work to ensure that educational systems are fair.



## Equity

We support solutions that lead to equitable educational experiences and outcomes for students.

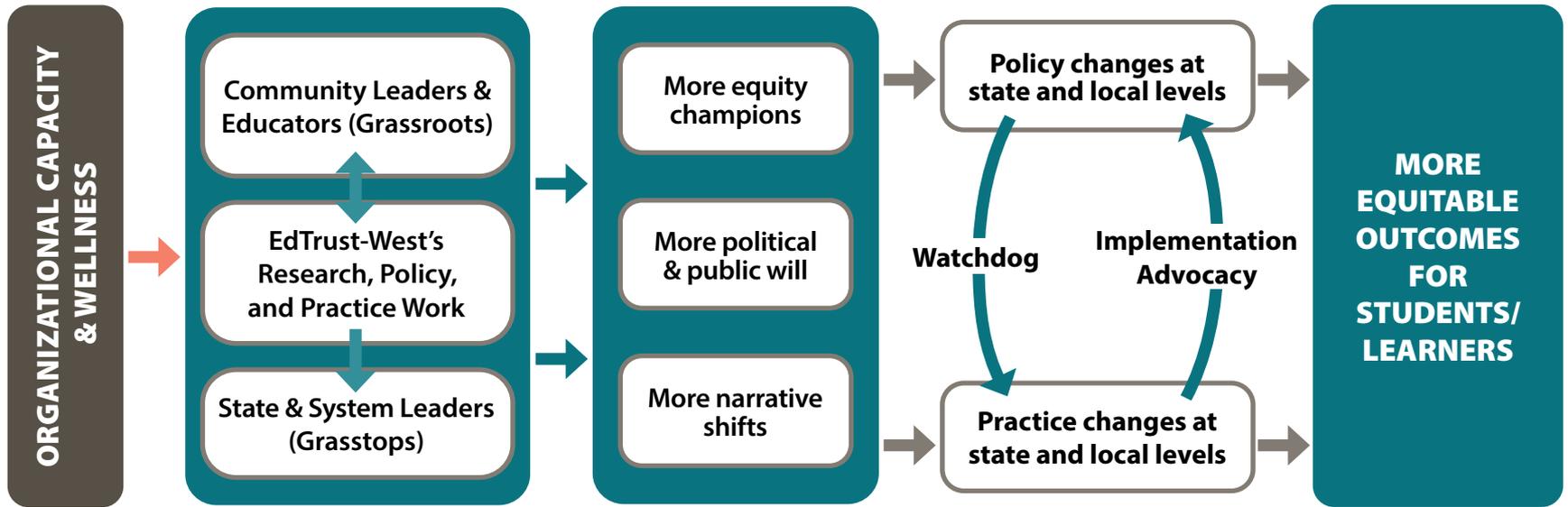


## Trust

We believe those closest to the problem have the solutions.



# Theory of Change



CHANGING  
policy

CHANGING  
narratives

CHANGING  
practice



# Our Theory of Change and Approach

On any given policy issue that emerges, we strategically gauge our involvement and level of investment based on the political, policy, advocacy, and practice landscapes.

We monitor a range of policy issues across the TK through college spectrum by attending relevant convenings, reviewing research, and maintaining close working relationships with researchers, advocates, and partners.

We support other partner organizations when we sign onto their policy recommendations, pitch in on partner campaigns, share policy recommendations, make public statements, and join relevant working groups or coalitions.

When we take a lead role, we go all in. We marshal organizational resources and galvanize our partner organizations toward statewide campaigns to increase awareness and motivate action among the public, decision-makers, and leaders.

# New & Noteworthy

## NEW

- ▶ Deeper TK-12 & higher education team expertise
- ▶ Galvanizing broader public support for education equity
- ▶ Growing an action-focused advocate network

## NOTEWORTHY

- ▶ Greater Los Angeles impact
- ▶ Building power through our signature programs:
  - Student & Early Career Fellowships (FIERCE Fellowship, Russlynn Ali Fellowship)
  - A network of community-based organizations (the CORE Collective)
  - Partnering with educators (Educator Advisory Council)
- ▶ Working across traditional TK-12 and higher education silos
- ▶ Diversity of our team
- ▶ Targeting regional and Spanish-language media



We will tenaciously pursue policy changes that will result in more equitable outcomes for students of color and multilingual learners, especially those experiencing poverty – including those from **Black, Latinx, Asian American, Pacific Islander**, and **Native American** communities – by focusing on the following organizational and programmatic priorities:





# Strategic Priorities 2023-2028

## PROGRAMMATIC

- ▶ Bold Policy and Advocacy Platform
- ▶ Equitable Implementation of Equity-Focused Policy and Practice
- ▶ Effective Coalition Building
- ▶ Clear Communication of Priorities and Impact
- ▶ Courageous Research, Data, and Analytic Leadership
- ▶ Deepened and Formalized Presence in Key Regions Across the State

## ORGANIZATIONAL

- ▶ Organization Sustainability and Growth
- ▶ Staff Capacity and Well-Being



# Bold Policy and Advocacy Platform

Draw on our unique organizational strengths to advance a policy agenda that is community and educator-informed, to secure policy and practice changes across the following policy priorities and issues:

## TK-12

- ▶ Rigorous and Affirming Curriculum and Instruction – Math
- ▶ Adequate and Equitable Funding
- ▶ A High-Quality, Racially and Linguistically Representative Teacher Workforce
- ▶ Equitable TK Implementation and TK-2 Student Success

## HIGHER EDUCATION

- ▶ Equitable Placement and Completion
- ▶ Dual Enrollment
- ▶ Financial Aid – Community College
- ▶ Financial Aid – High School
- ▶ Parenting Students

## CROSS-CUTTING

- ▶ State Data Systems
- ▶ Strengthen Programs and Outcomes for Multilingual Learners
- ▶ Protect and Advance Civil and Educational Rights from Federal Attacks

We will achieve our **bold policy** and **advocacy platform** by engaging in the following **strategic approaches**, which align with our **theory of change** and are informed by over two decades of assessing and refining our unique approach:



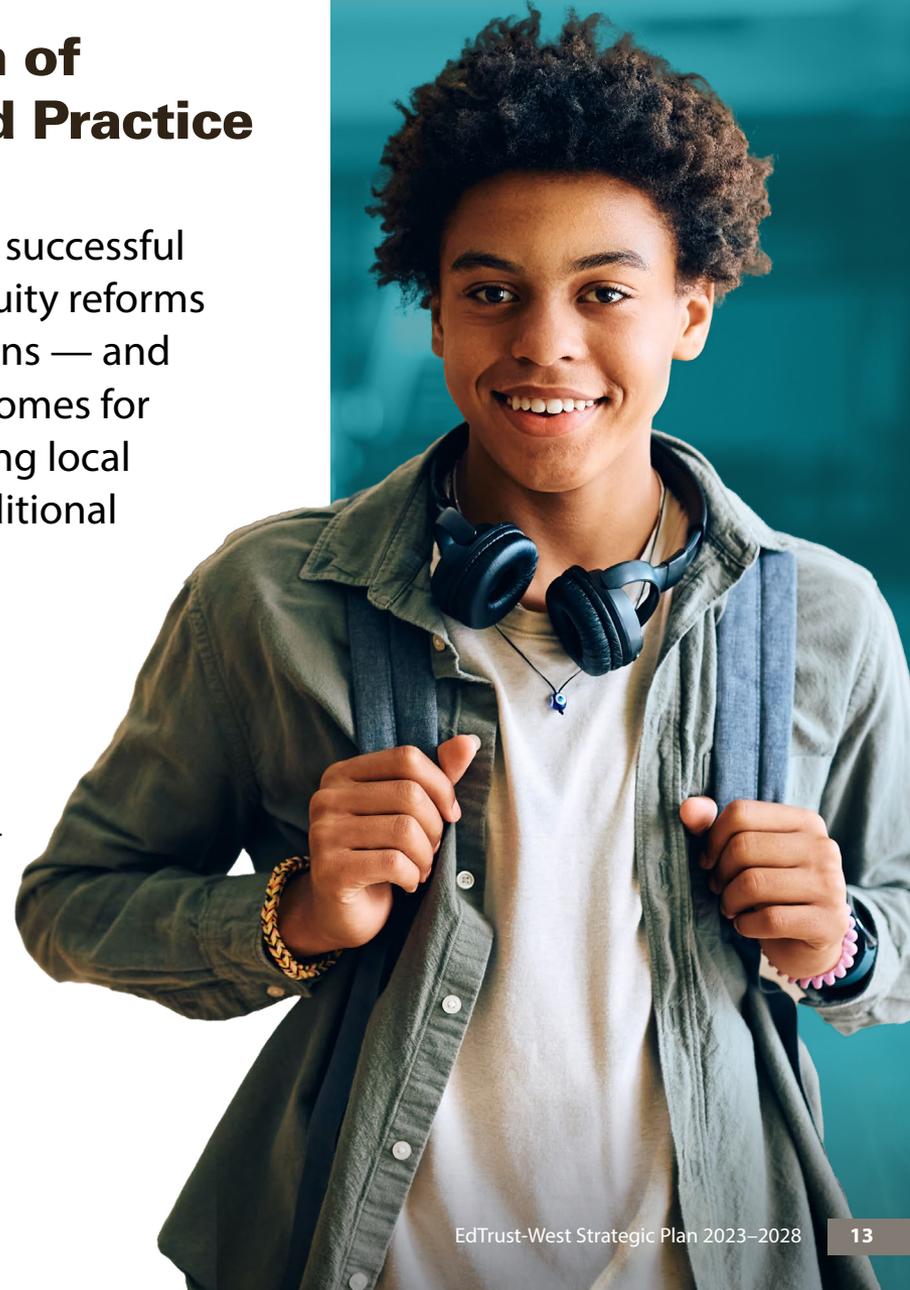


## Equitable Implementation of Equity-Focused Policy and Practice

Monitor, advocate for, and support the successful implementation of key educational equity reforms — across the state and in priority regions — and work to improve experiences and outcomes for the students we prioritize, by influencing local policies and practices, and seeking additional policy change if necessary.

### GOALS

- ▶ Monitor implementation and evaluate the impact of equity-focused policies
- ▶ Advocate for the adoption of new equity-centered policies and practices
- ▶ Increase the organization's profile as a trusted partner and technical assistance provider





## Effective Coalition Building

Strengthen the partnerships and connections between state and system leaders, community leaders, and educators; build thriving coalitions; and engage with stakeholders via multiple modalities about educational equity priorities statewide and in priority regions.

### GOALS

- ▶ Provide education equity champions with high-quality and valuable support to advance racial equity in education across the TK-16 continuum, locally and statewide
- ▶ Deepen relationships with new education equity leaders and organizations, particularly those working to advance outcomes for Indigenous/Native American, Asian/Asian American, and Pacific Islander students
- ▶ Cultivate at least five education equity champions in the AAPI, Black, and Latino caucuses of the Legislature
- ▶ Explore strategies to build political power throughout the state





## Clear Communication of Priorities and Impact

Enhance awareness of critical educational equity issues and solutions in EdTrust-West's policy and advocacy platform, and elevate our role in the education ecosystem by raising our profile and communicating our impact regionally and across the state.

### GOALS

- ▶ Position EdTrust-West as a seen and sought-after source by legislators, fellow advocates, local education agencies, parents, and students
- ▶ Creatively expand avenues of communication to include regional and Spanish-language earned media
- ▶ Build public relations capacity of the EdTrust-West team
- ▶ Galvanize new groups of education equity supporters who are actively engaged in advocating for California's students



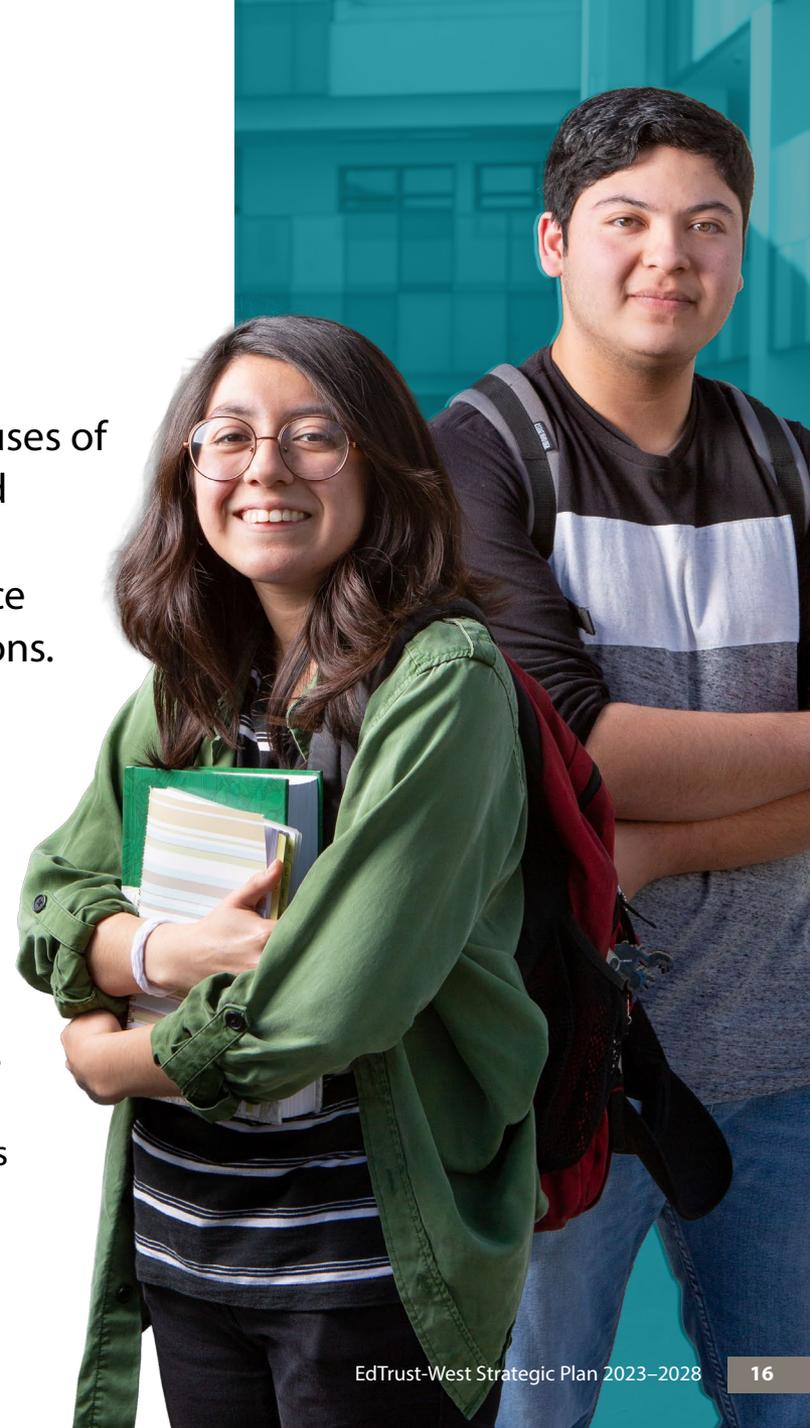


## Courageous Research, Data, and Analytic Leadership

Leverage mixed-methods research that is both rigorous and asset-based to identify root causes of educational inequity, inform evidence-based design of policy solutions, and support stakeholder engagement with data to advance advocacy across the state and in priority regions.

### GOALS

- ▶ Produce timely, actionable research focusing explicitly on racial equity, featuring intersectional analyses where possible and relevant
- ▶ Create opportunities for community-based organizations, local leaders, families, and educators to build data fluency on equity issues across the TK-16 continuum
- ▶ Disseminate learnings from direct engagements with students, educators, schools, districts, educational institutions, and community-based organizations





## **Deepened and Formalized Presence in Key Regions across the State**

Build partnerships and relationships to engage a local network of advocates in key regions across the state who can inform and help advance our policy agenda as well as lead and participate in local advocacy; engage with stakeholders via multiple modalities about regional educational equity priorities that can improve experiences and outcomes for students of color and multilingual learners, especially for those experiencing poverty.

### **BROAD GOAL**

Explore opportunities to maximize partnerships and local networks of advocates to increase potential impact in the Central Valley, Inland Empire, and the Bay Area.

### **GREATER LOS ANGELES REGION GOALS**

- ▶ Solidify financial sustainability and growth for the Greater Los Angeles regional strategy for five years and beyond
- ▶ Secure a location and dedicated regional staff to address regional equity issues across the TK-16 continuum
- ▶ Create a regional policy agenda and implement advocacy strategies that are community and educator-informed, impactful, strategic, and advance our mission in Greater Los Angeles
- ▶ Increase visibility in the Greater Los Angeles Region through media engagement, hosting events, and growing relationships with regional advocates.



## Organizational Sustainability

Ensure the sustainability and appropriate growth of EdTrust-West by aligning and regularly assessing organizational policies, practices, and funding opportunities with the mission, vision, values, and theory of change.

### GOALS

- ▶ Recruit, retain, and support a well-qualified and racially diverse staff
- ▶ Build institutional knowledge
- ▶ Continue values-aligned internal spending
- ▶ Enhance internal communications





## Staff Capacity and Well-Being

Enhance staff experience and sustainability by investing in employee development, monitoring capacity, and fostering an organizational culture anchored in structures and systems that share power, decision-making, and feedback, while providing opportunities and resources to achieve goals and advance diversity, equity, inclusion, and belonging.

### GOALS

- ▶ Establish an equitable decision-making framework
- ▶ Leverage data to enhance staff experience
- ▶ Equip people managers with tools to efficiently and equitably manage



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*When you get these jobs that you have been so brilliantly trained for, just remember that your real job is that if you are free, you need to free somebody else. If you have some power, then your job is to empower somebody else.*

*This is not just a grab-bag candy game.*

**Toni Morrison**

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