



Overview: [YouthTruth](#) (an initiative of [CEP](#)) seeks near-term consulting support to structure and facilitate a planning process exploring our vision, strategy, growth, organizational structure, and impact in 2022 and beyond.

Summary

We are seeking a consultant to engage our team and other stakeholders (e.g. CEP board, YouthTruth advisory board, clients) in a series of conversations and data-gathering activities to help clarify and articulate our vision and strategy for the future, and guide a series of choices about how we pursue our mission in the coming years. In addition to facilitating the process, a key deliverable would be a document outlining key decisions, scenarios, and plans over the next few years. We envision that the selected consultant would help us refine the areas for exploration and guiding questions, articulated below, as well as which stakeholders to engage at which points in the process.

Organizational Background – YouthTruth

YouthTruth, an initiative of the Center for Effective Philanthropy (CEP), harnesses student and stakeholder feedback to help K-12 school leaders and education funders accelerate improvements. We believe, and research shows, that student and stakeholder voice matters. Through our validated survey instruments and tailored advisory services, we partner with schools, districts, states, and education funders to enhance learning for all students. Founded in 2008 in collaboration with the Bill & Melinda Gates Foundation, YouthTruth has surveyed over 1.8 million students and 300,000 family and staff members across 39 states.

YouthTruth is funded through a mix of grants and earned revenue and is growing rapidly – and accordingly expanding the number of schools, districts, and charter management organizations that are using student perceptions in their instructional and leadership decisions.

YouthTruth pursues its mission through three key areas of work.

1. **Surveys, analysis, and reporting:** YouthTruth offers several student survey products, as well as more recently added tools to gather input from family and staff members. Survey instruments are research-based and continually tested for their validity and reliability, as well as their utility to clients. Results are shared back, typically within seven business days, in a secure online reporting platform. The interactive reports allow users to seamlessly explore differences across schools, demographic subgroups, and relevant comparison cohorts. Results are shown relative to our national comparative dataset to help put ratings in context. We partner with ~ 150 school systems and create ~ 2,000 data-driven reports synthesizing stakeholders' feedback annually.
2. **Advisory services:** Through our advisory and professional development offerings, YouthTruth equips our partners to integrate insights from student feedback into planning and improvement efforts, and coaches leaders on how to use the data to drive change. Advisory offerings include: results consultations for school leadership teams, group webinars for school and district leaders to explore and plan based on district-wide findings, professional development workshops for

school, district, and foundation leaders; student voice workshops; and workshops for other groups (e.g. school board, school site council, parent groups, accreditation processes).

3. **Aggregate analysis, research, and resources:** In addition to our work with clients, YouthTruth publishes guidebooks and reports analyzing and sharing what we’re learning nationally from hundreds of thousands of students. We launched our *Learning from Student Voice* series in 2016 to bring data and insights to bear on pressing challenges related to school experience and improvement. In 2020 and 2021 we released a three-part report series, *Students Weigh In: Learning & Well-Being During COVID-19* to shed light on students’ unique experiences during the pandemic. YouthTruth also creates timely resources for our national audience of education and foundation leaders, such as case studies or exemplars, webinars or trainings, and guidebooks on how to use student perception data effectively for different use cases.

YouthTruth is housed within the Center for Effective Philanthropy but is a discrete and separately branded initiative. YouthTruth and CEP have shared technology platforms and similar methodologies, shared staff (YouthTruth does not have its own finance and operations or people and culture staff), and a strong working relationship. CEP and YouthTruth together have approximately 50 employees located primarily in Massachusetts and California. The YouthTruth team is located primarily in the San Francisco Bay Area and currently has 13 staff members and four open searches, including one replacement and three incremental positions.

Organizational Background – CEP

The Center for Effective Philanthropy is a 501(c)(3) organization focused on the development of data and insight to enable higher-performing funders. CEP’s mission is to provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness — and as a result, their intended impact. This mission is driven by the belief that more effective philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve. CEP pursues its overarching goal of enabling higher-performing funders through several key areas of work: research, assessment and advisory services, and programming and external relations. CEP develops highly regarded research reports, offers assessment tools and customized engagements, and shares information about philanthropic effectiveness through online and “live” programming, our blog, and podcast. Funded by a mix of grants and earned revenue, CEP serves over 150 clients each year, mostly located in the United States with some overseas clients.

Background on the Need

As the field has become more open to listening to beneficiary feedback and embracing multiple measures, YouthTruth has grown dramatically in the last several years – amplifying increasingly more student voices (as well as those of staff and family members) – and helping school systems incorporate the perspectives of students, family, and staff into planning and school improvement efforts. Client feedback data over the past few years indicates that 70 to 80 percent of clients are using the data gathered to make changes in at least one area. At the same time, we have made progress engaging



funders in using YouthTruth data – consistent with YouthTruth’s founding vision – through two regional funder initiatives in the Bay Area and Ohio, and through standalone engagements with several funders and their research and school system partners.

In 2016 YouthTruth began analyzing and sharing insights from our national aggregate dataset through our *Learning from Student Voice* series and has released two to three reports annually as well as resource publications including case studies and guidebooks. During the pandemic, we have highlighted student experiences through our *Students Weigh In: Learning & Well-Being During COVID-19* report series. We believe this work has both contributed to YouthTruth’s visibility and offered valuable insights to the field.

YouthTruth’s business model continues to evolve. After launching in 2008 with a purely grant funded model, YouthTruth began developing a partial fee-for-service model in 2012 – with schools, districts, and/or funders paying for YouthTruth products and services although not at the fully loaded cost – and has grown earned revenue approximately 40 percent year-over-year for the last six years. Earned revenue now accounts for approximately two thirds of YouthTruth’s budget. In 2019 – for the first time ever – YouthTruth generated a surplus after covering its fully allocated costs through a combination of earned revenue and contributed revenue. This shift continued in 2020 and will be maintained in 2021. While a decreasing proportion of total revenue, we expect that contributed revenue will still be needed for the foreseeable future.

During the uncertainty of the last year and a half, we have been focused on the near term: rapidly adapting in light of the pandemic and maintaining both contracts and impact. As we emerge from the tumultuous 2020-2021 school year, school systems and education funders alike seem to be recognizing the especially important need to hear directly from students and use their insights to inform decision-making about the future of schooling – with a strong focus on equity and social emotional learning. Demand is bounding back faster than anticipated after an initial dip early in the pandemic and our 2021 revenue and client reach is by far our largest ever, with further projected growth in 2022.

While we have annual work planning and goal setting practices, and regularly monitor progress through a set of indicators, we have not carved out the space to step back and engage in longer-term strategic planning in recent years. In light of both the way we have matured and changed, and the appetite we perceive in the external environment, it feels like the right time to take stock of YouthTruth’s position and vision for the future.

The Project

We are seeking a consultant to guide our team – and engage other stakeholders as appropriate – in a process exploring our vision and strategy for the coming years. We anticipate that the selected partner would help us refine the areas for exploration and guiding questions, as well as which stakeholders to engage at which points in the process, including areas such as:

1. **Market analysis:** How does YouthTruth compare to and how are we differentiated from key competitors?¹ What federal and state policies and funding streams influence the survey landscape and market (e.g. state requirements to include student/parent feedback, or to use a specific vendor)? What use cases are the primary drivers of demand for student feedback? Is the unit of analysis at the individual-student or whole school level? What language is being used to describe the work (e.g. “climate survey” is starting to feel outdated)?
2. **Longer-term vision and goals:** What kind of change do we want to create in the world and for whom? Who are we serving? What kind of impact do we want to have for our core audience(s)?
3. **Strategy:** How do we best achieve the goals we’ve articulated? Should we continue to grow? Why or why not? At what pace? Should we emphasize breadth, serving increasingly more partners with a similar scope of services, or pivot our approach and go deeper with a relatively smaller number of partners? Why?
4. **Products and services:** Given the vision and growth strategy articulated and evolving market dynamics, do we have the right balance of products and services to advance our mission? Are there ways we might evolve our offerings? (Current areas of work include surveys, advisory services, and research.)
5. **Business and revenue model:** What is the optimal revenue mix, pricing approach, and economic model that supports our strategy and sustainability? Note: we are exploring internally the full cost of client engagements, primary drivers of variation in cost, and extent to which contributed revenue is subsidizing our client engagements.
6. **Staffing and structure:** To what extent does our current staffing, organizational structure, and governance support the vision, goals, and strategy we’ve articulated for the future? In what ways might they need to evolve?

RFP Process

We aim to begin this work in Q4 2021 and envision a two-stage process for selecting this consultant. We invite you or your firm to submit an initial Letter of Inquiry to us by October 8th. Send your proposals to Alyse d’Amico at alysed@cep.org.

LOI Stage

Interested parties should prepare a brief (1-2 page) Letter of Inquiry that describes:

- The activities you anticipate using to address these needs, including what you would need from us
- A rough sense of timeline and potential cost (we recognize this could change in the second phase as you learn more about our needs)
- Your qualifications to execute this work well, including examples of any similar work
- How you or your organization incorporate values of diversity, equity, and inclusion into your work with clients

¹ YouthTruth staff can provide a strong starting point for a competitive landscape analysis.

As you write your letter of inquiry, we would be happy to have brief conversations with interested parties about our work.

Selection Stage

We will select a small group of finalists based on the Letter of Inquiry. At that point, we would invite a conversation with each finalist to answer deeper questions about our work to allow for finalists to develop a full proposal. With this information, we will then ask you to prepare a formal proposal, detailing activities, cost, timeline, deliverables, etc. We will conduct final interviews based on those proposals and select a partner based on those interviews.

CEP is committed to values of diversity, equity, and inclusion as described in [Goal 2 of this document](#). Understanding the diversity of our partners is an important component of this goal, and should you be selected for a final RFP we would ask you to provide demographics (i.e., race and ethnicity and gender) of your organization’s leadership.

Timeline

LOI due:	October 8 th
Proposals due from finalists:	October 29 th
Decision:	November 5 th
Project start:	Mid-November preferred