



**20 YEARS,  
20 STORIES.**



WORCESTER STATE UNIVERSITY  
LATINO EDUCATION INSTITUTE

## **LEI STRATEGIC PLAN 2020**

**DRAFT FOR REVIEW BY CAB – 4/16/20**

*Our mission:*

*To improve the academic achievement and well-being of Latino students (grades K-16) and their families from the City of Worcester.*

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## **Purpose of Strategic Planning Process**

In 1999, The Worcester Working Coalition for Latino Students, a grassroots group composed of community and elected leaders, concerned parents, and educators, published a call to action outlining strategies to improve educational outcomes for Latino students. Their proposal included a recommendation to create a university-based institute dedicated to improving the educational outcomes and experiences of Latino students in Worcester. Through an agreement with Worcester State University (WSU) in 2000, the Latino Education Institute (LEI) was founded. Since then, LEI has developed and implemented a series of innovative, holistic, and culturally sustaining programs that have served thousands of Latino students and their families. LEI has also led research and policy initiatives, bringing attention to the importance of effectively meeting the educational needs of this growing student population in the city of Worcester as well as the Commonwealth of Massachusetts. Critical to their work, has been LEI's commitment to work in partnership with a variety of stakeholders including community members, educational leaders and school officials, parents, policymakers, students, the LEI staff, volunteers, and other stakeholders.

As LEI approaches its 20<sup>th</sup> anniversary, and in recognition of the role that LEI stakeholders have played as the stewards of the Institute's mission and work, beginning in the Spring of 2019, LEI engaged in a strategic planning process that would inform LEI's future. The goals of this process were as follows:

- To reaffirm the mission of the LEI;
- To identify imminent strengths, challenges, threats, and opportunities to the Institute's ability to meet its mission;
- To discuss, recognize, and celebrate the role and responsibilities of staff as stewards of the LEI's mission;
- To deliberate critical planning questions regarding the Institute's current work and future position; and
- To identify a long term and short-term priority action items that will support the growth of LEI.

Important to note is that LEI strategic planning process is also a timely response to important sociocultural and political realities that have impacted LEI's work. These include the growing Latino population in the city of Worcester and the state of Massachusetts, changes in the political climate at the national, state, and local level, shifts in LEI's leadership and programmatic structure, and WSU's strategic planning. As such, this strategic planning process required that LEI openly and rigorously deliberate these contexts and consider paradigm shifts in their thinking and working, knowing that restructuring and changes in the Institute's activities were likely to occur.

The results from this strategic planning are summarized in this report. The report begins with a description of the strategic planning process. In the subsequent section, key findings as well as identified salient themes regarding LEI's possible strategic directions are discussed. The report closes with a series of recommendations for next steps.

## *Strategic Planning Process*

Grounded by principles of collaboration and community building, and with the goal of ensuring that the perspectives of LEI's diverse stakeholders would inform its future directions, LEI's strategic planning process included several interconnected phases (See Figure 1). The process began in the late spring of 2019 with a set of key informant interviews with staff, Board members, and other stakeholders.<sup>1</sup> During the summer of 2019, a series of engagement activities were held with LEI's staff, which included a focus group, a survey, and a culminating retreat. On September 2019, LEI's

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<sup>1</sup> Henceforward, stakeholders who participated in this process are referred as participants.

Community Advisory Board (CAB) met to review and deliberate the initial findings of the process as well as consider critical questions centered around four main themes: (1) The Role of CAB; The relationship between LEI and WSU; (3) LEI's Advocacy Role; and (4) Programs and Programming (Expansion vs Dosage).<sup>2</sup> The final data gathering step of the strategic planning process included engaging with parents and youth participants of the LEI programs. In the Fall of 2019, LEI staff organized and facilitated two focus groups: one with parents and one with youth. At the end of the fall semester, they also administered a survey to parents and youth. The author of this report analyzed the notes and recording of the focus groups as well as the survey data.

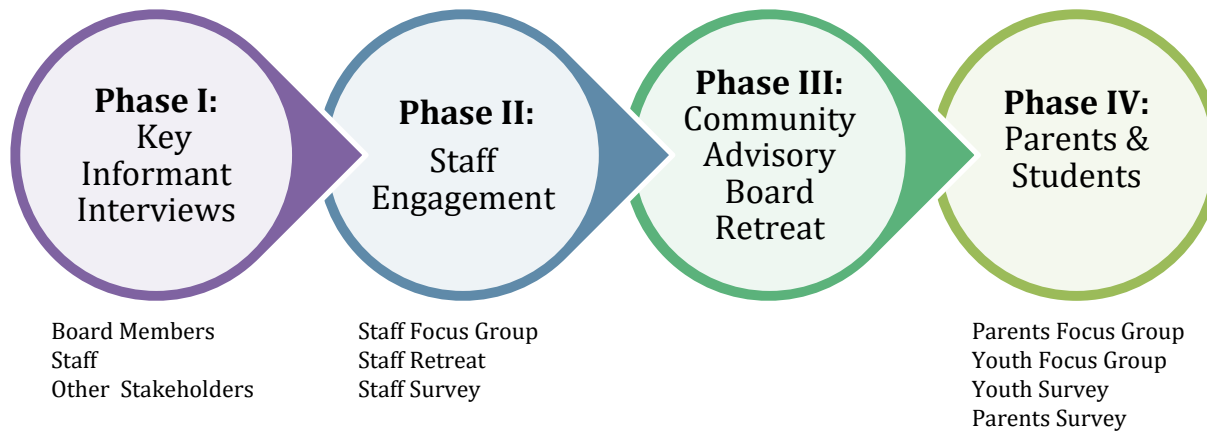
Through this entire strategic process, the author also engaged in ongoing conversations with LEI's leadership team and conducted a review of past strategic plans as well as internal planning documents and reports. LEI's leadership team and CAB reviewed drafts of this reports and prioritize action

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<sup>2</sup> Questions are available in Appendix B.

items to develop a strategic direction. The findings and identified potential strategic directions discussed in the subsequent sections are reflective of this entire learning process. As such, the identified critical questions and priority action items are a result of this deliberate nine-month process.

*Figure : Strategic Planning Process*



## Results: What We Have Learned

### Finding 1: A Mission-Driven Organization

Without a doubt, all participants shared a firm belief that the mission and vision of the LEI continues to be of utmost importance and that LEI is a mission-driven organization. The importance of the mission was discussed in three equally important and connected ways:

1. **Worcester has a substantial Latino student population that is growing.** At the time of the LEI's founding, Latino students comprised 28%<sup>3</sup> of all Worcester Public Schools (WPS) students. Currently, the Latino student enrollment is 43%<sup>4</sup>, making Latino students in the district the largest student group.
2. This demographic shift is consistent with **statewide projections** which suggest that the Latino population is growing across the Commonwealth. As such, the growing Latino population will not only impact the demographic profile of the city's schools but also of colleges and universities, public and private industries, and all facets of life in the Worcester metropolitan area.
3. While progress has been made to address the needs of Latino learners in Worcester, there continues to be a **persistent gap in educational outcomes between Latino students and their peers across multiple educational indicators.** These gaps are coupled with mounting concerns regarding the quality of education that Latino students are receiving. For example, parents, students, and community leaders, have consistently shared apprehensions regarding a host of issues that impact the learning and outcomes for Latino students, including the rigor of instruction provided, efforts of WPS to engage families and communities in school life, limited college access and career training, the lack of diversity in teachers and administrators, the availability of services to English learners and their families, and the enforcement of harsh disciplinary policies, all which disproportional impact Latino students.
4. The importance of LEI's mission was also discussed relative to **changes in leadership and the political climate at the city, the state, and the national level.** For example, recent xenophobic rhetoric and hate crimes at the national level have increased the fears of local Latino and immigrant families and has raised questions about how LEI can help families and their children navigate these circumstances. Further, recent local leadership changes at the district level have led the LEI to implement the Mayors' Commission to highlight challenges in several areas of education such as diversity of teachers, suspensions, and lack of advanced opportunities for Latino Students. The public sessions (held throughout 2019) strained the relationships among many local stakeholders. Congruently, the City of Worcester and the State are presently engaged in efforts to elevate the importance of the Latino community (i.e. Mayor's Commission on Latino Educational Excellence and

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<sup>3</sup> Massachusetts Department of Elementary and Secondary Education. (n.d.). *1993-94 Enrollment by Race/Gender Statewide Report (District)*. Retrieved November 2, 2019, from <http://profiles.doe.mass.edu/statereport/enrollmentbyracegender.aspx>

<sup>4</sup> Massachusetts Department of Elementary and Secondary Education. (n.d.). *Worcester Public Schools District Profile 2019*. Retrieved November 2, 2019, from <http://profiles.doe.mass.edu/general/general.aspx?topNavID=1&leftNavId=100&orgcode=03480000&orgtypecode=5>

Massachusetts Department of Higher Education Equity Agenda). LEI has been a part of these efforts, always bringing attention to the needs and strengths of Latino students and their families.

**As such, the relevance and value-added of LEI's mission both historically and contemporarily cannot be understated.**

### *Finding 2: A Plethora of Strengths*

As part of understanding the “big picture” of the LEI's current planning environment, all participants engaged in various SWOT analysis exercises. The SWOT analysis framework is widely used as an organizational planning technique for understanding the *Strengths, Weaknesses, Opportunities, and Threats* an organization may encounter.<sup>5</sup> Participants identified a plethora of strengths that LEI possesses. Across all participants, the most salient strengths identified were as follows:

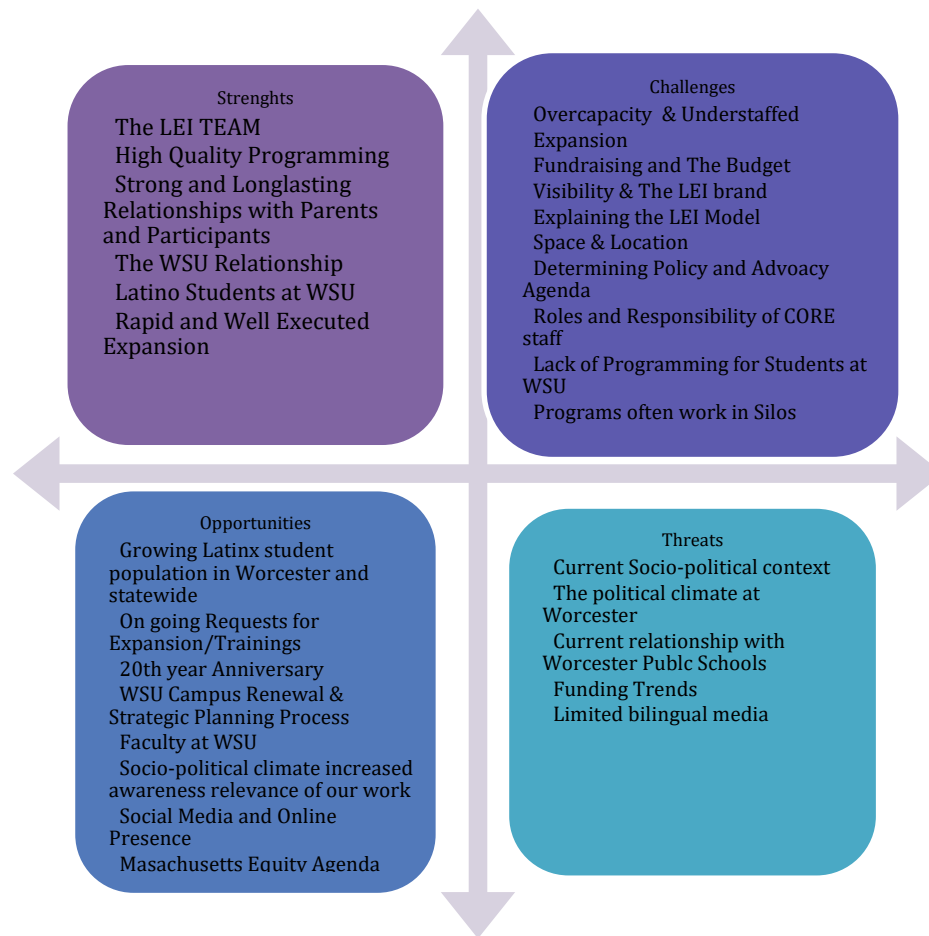
- **The LEI Team:** LEI benefits from a leadership team and staff that is highly competent, bilingual, caring, culturally responsive, and has a deep commitment to Latino students and their families. The LEI team was described as stable, well-respected, knowledgeable, and with long-standing and authentic connections to the Latino community in Worcester and beyond. Both youth and adult students also discussed the professionally and deep connections they felt with program coordinators and teacher. One youth spoke about the importance of LEI's team being Latino and/or immigrant- a phenomenon that they do not often experience. Another student reported that at LEI, “*Sentimos una emoción, muy atendidos*” [we feel emotionally connected and well taken care of.]
- **LEI's Reputation for High Quality Program:** The Institute also is widely considered to be a trusted voice with a proven record of providing high-quality programming that makes a difference in the lives of students and families. Over its 20-year history, despite many challenges it has faced, has earned a reputation of being a flexible, responsive, and resilient organization that continues to be a key player in serving and advocating for Latino students and their families. One youth participant, described their experience with LEI programs as follows: LIDER has helped me focus on what I want to do, helped me focus on a career path and what we are looking for in a university and the most important things to look for in a college”. LEI's reputation extends beyond Worcester's borders. Over the past ten years there has been a growing demand for LEI to not only expand its programming in Worcester but to also replicate its model in other localities. Expansion efforts have begun in Springfield and Southbridge. LEI has also been a lead convener in statewide policy conversations on the status of Latino students.
- **LEI's Values:** LEI sees the Latino community, and in particular Latino students and their families from a strength-based perspective. LEI, its CAB members, leaders, staff, and volunteers value diversity and inclusion, bilingualism, family, community, and the Latino community in general. LEI is a place where students and families are respected and where they feel a sense of community. As such, students, their parents, alumni and LEI's partners have developed long term engagement and commitments with LEI. Through the enactment of organizational values, LEI lives its mission.
- **The WSU Relationship:** LEI is one of few Latino service organization in the nation that is housed at an Institution of Higher Learning (IHL). This unique component of the LEI model has exposed students, families, and communities to the possibilities of higher education. LEI has also served

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<sup>5</sup> See Appendix D for the full description of the process and detailed description of the findings.

as unofficial home to WSU Latino students and promotes equity, inclusion, and diversity within WSU. In this way, the relationship between LEI and WSU is one that grounded on principles of mutuality and reciprocity.

These are just a few of the strengths identified through this process. A full summary of the discussions on the LEI's strengths can be found in [Appendix D](#).





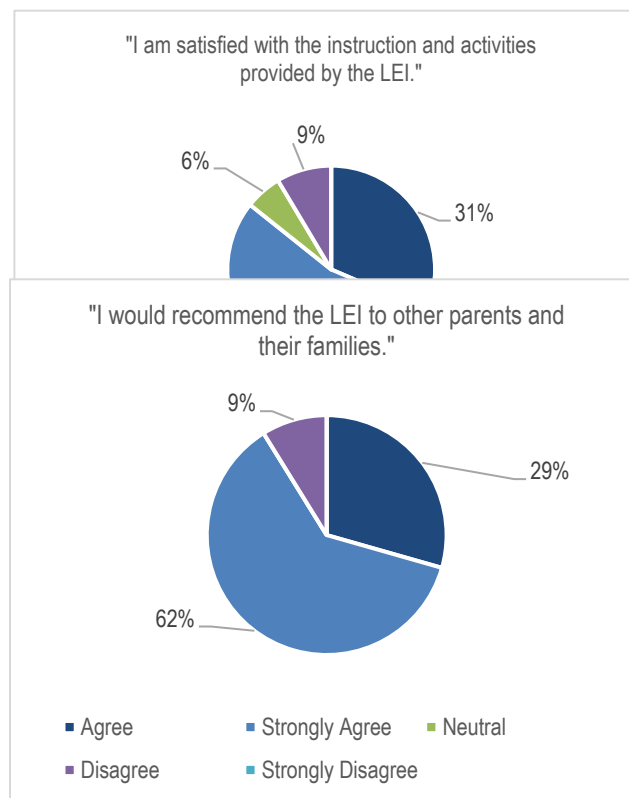
### Finding 3: Responsive to Parents and Participant Expectations<sup>6</sup>

At the heart of LEI's model are the students and the high quality services and programming. The data survey suggest that parents and youth are highly met their expectations. Specifically, and as noted on series of statements on regarding their experiences at

- 85% of parent survey respondents (n=35), satisfied with the instruction and activities strongly agreed.
- 91% of parent survey respondents reported another family; of this 62 % strongly agreed
- 88% of parent survey respondents reported from their participation in LEI programs; of statement.

The open response questions in the parent survey as participants (n=5) provided additional insights. satisfied with the programming at LEI, in response to relative to parental involvement and engagement, recommendations for the LEI's leadership team to *Youth Participant Recommendations*). The most

Figures 3,4,5: Sample of Parent Survey Responses



families who entrust LEI to provide collected from the focus groups and satisfied with LEI's programming and Figures 3, 4, 5, when presented a LEI, parents<sup>7</sup> responded as follows: agreed with the statement, "I am provided by the LEI."- from this 54 %

that they would recommend LEI to that they would. that they felt their families benefitted this 62 % strongly agreed with the

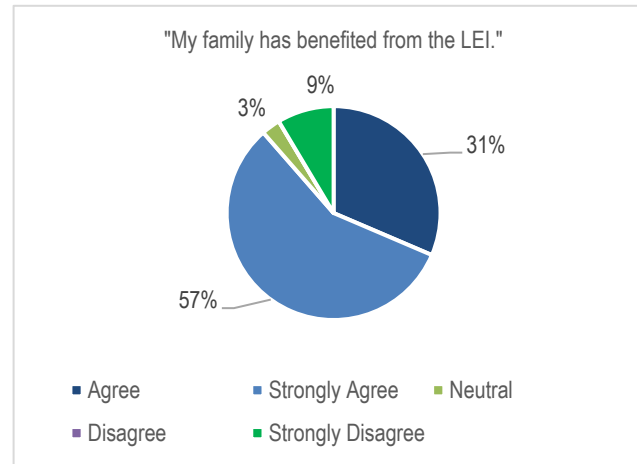
well as the parent focus group While parents were generally very the strategic planning process they provided a series of consider (See Table 1: *Parent and* salient recommendations included

<sup>6</sup> While this section primarily focuses on findings from the focus group and survey for parents and youth, it is important to note that the findings from these processes are also embedded throughout the report.

<sup>7</sup> Approximately 46 parents participated in this process (Survey= 35; Focus Group= 11). Due to the anonymity of the parent's survey, these two groups are not mutually exclusive.

the following:

1. **Increase Parent Education Programs:** Parents expressed a desire to increase adult education programming that targets parents of children involved in LEI. Participating parents largely discussed Adults ESL as their primary education need. They argued that there was great interest in community to take ESL at LEI, particularly because of the excellent teaching. One parent asked, "If the institute sees that the demand for English classes is so big, why haven't they opened more English classes?" Other parents suggest that LEI could also offer course work in other content areas, including at the WSU. As LEI considers its future, parents recommended an increase in adult education programming in terms of the number of frequency in which those classes were offered.
2. **Develop Workshop Series (*Talleres*):** wanted LEI to host more workshops on managing behavior, adolescent system, transitioning to college, media, school discipline policies, etc. These meet their information need but would with one another.
3. **Teach Spanish to Children:** Parents also heritage language maintenance. In which suggest that cultural and nonprofit types of services in lieu of English only Spanish to their children and promote
4. **Fieldtrips:** Parents also believe that LEI students would benefit from more field trips, particularly to local colleges and universities.
5. **Maintain gender-specific programs:** Several parents spoke of the importance of maintaining gender-specific groups. They discussed the importance of students having a place where they could have mentors, and discuss issues that are developmentally appropriate in a safe and comfortable group settings.



Parents also discussed that they important and timely topics (i.e. development, navigating the school cyberbullying and use of social recurring workshops would not only allow them to make connections

discussed the importance of native alignment with national trends, organizations are providing these policies, parents wanted LEI to teach bilingualism.

The recommendations and perspectives of parents were consistent with youth participants.<sup>8</sup> Similar to parents, youth participants also had favorable opinions of LEI and its programming. A noted in Figures 6, 7, 8, when presented a series of statements regarding their experiences at LEI, youth participants responded as follows:

- 94% of youth survey respondents (m=33), agreed with the statement, "I am satisfied with the instruction and activities provided by the LEI."- from this 67 % strongly agreed.
- 97% of youth survey respondents reported that they would recommend LEI to another youth; of this 67 % strongly agreed that they would.

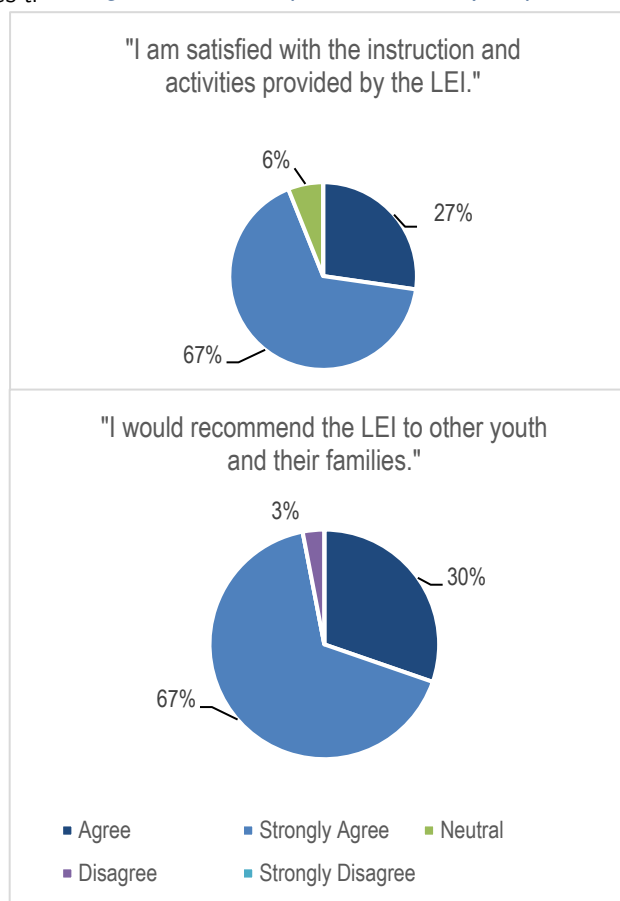
<sup>8</sup> Approximately 53 youth participated in this process (Survey= 48; Focus Group= 5). Due to the anonymity of the parent's survey, these two groups are not mutually exclusive. Youth participants were part of various programs of LEI including YCU, Teen Circle, LIDER, LASOS, ENLACE and Conversation Circle/ Wednesday Tutoring, My Voice/My Community, and represented an age range 5 to 18 years old.

- 97% youth survey respondents reported that they felt their families benefited from their participation in LEI programs; of this 62 % strongly agreed with the statement.

As it pertains to recommendations for the future of LEI, youth responses presented a series of poignant ideas, the most salient being:

- Field Trips:** The most frequent recommendation was for LEI to expand its experiential learning opportunities to their decision-making processes. UMass Amherst, colleges that were named.
- Career and Job Readiness:** Youth participants also programming that is specific to career and job Understanding how to apply (and get jobs) as well different careers paths were discussed. Several that they wanted more STEM-related programming information on academic and career options.
- One-on-one support or mentoring (10):** Youth one on one mentoring in several aspects of their support, college application processes, as well as discussed wanting to have mentors that have similar (i.e. Latino, immigrant, first-generation) who could achieve. As one youth participant shared, *"cuando puede ver haciendo los mismo"* [when one see a yourself doing the same thing].

Figures 6, 7, 8: Sample of Youth Survey Responses



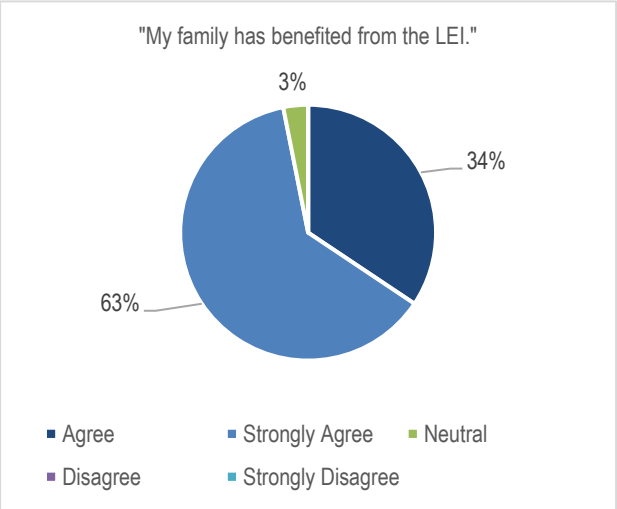
re colleges to better inform BU, UMass Boston were of the

expressed a desire for training and readiness. as wanting information on students, in particular, shared so that they could have more

participants wanted to have lives including academic career planning. They lived experiences as they have inspire and motivate them to *uno ve un ejemplo, uno se* real life example, you can see

4. **Workshops:** Along this vein, youth participants also having one time workshops with motivational guest the topic of interests. Participants wanted to hear, were successful in their careers, current college STEM.
5. **Homework Help and academic support:** Many important for LEI to continue to provide homework tutoring services.
6. **Improve Transportation to LEI:** Likewise, several getting to and from LEI to get additional supports be cumbersome and LEI could improve in their that more students could attend.

The list of all recommendations can be found in Table 1: Recommendations.



discussed the possibility of speakers who were experts on for example, from folks who students, as well as women in

participants shared that it was help, as well as expand their

participants also shared that and participate in program can transportation options to LEI so

Parent and Youth

Table 1: Parent and Youth Recommendations

Recommendations by Parents	Recommendations by Student Participants
Increase adult education programs (8)	Field Trips (11): More college visits to target schools/popular picks (ex. UMass Amherst, Boston University, UMass Boston, etc.)
Talleres (6): Provide Workshops on important and timely topics that parents want to know more about (i.e. managing behavior, adolescent development, navigating the school system, transitioning to college, cyberbullying and use of social media, school discipline policies, etc.	Programs to help with Career and Jobs (12)

Teach Spanish to Children (5)	One-on-one support or mentoring (10)
Have more field trips (colleges visits) (4)	Talleres: Workshops with motivational Guest Speakers that have lived experiences on topics of Motivational Guest Speakers (Career and College experts, current college students, Women in STEM) (7)
More parent involvement (4)	Homework Help and academic support (6)
Maintain gender-specific programs(4)	Improve Transpiration to LEI (5)
Expansion of Programs (to other schools, more grades, and longer services) (3)	Expansion of Programs (to other schools, more grades, and longer services) (3)
Provide homework tutoring (2)	Offer participants paid jobs (2)
On-site mental health support for parents and youth (2)	LGBTQ+ programming (2)
Increase the use of technology and social media so that more Latino know about LEI programs and services, and the information that is shared (2)	More Cultural Activities (2)
Cultural Activities (dance, art, theater, and celebration of Latino holidays and events) (2)	Increase publicity so more students know about LEI (2)
Provide scholarships to students who are going to college	Access to on-campus facilities and courses
Summer School and Summer Camp	More activities that are specific to Junior in High school
Provide Vocation and Training Program opportunities for Parents (i.e. CAN certification)	Direct scholarship opportunities
Offer College Courses in Spanish (Vision for a Spanish language University)	Help with college application process
Leadership Training for Families	Ability to take College Class at WSU
Work with schools to improve safety and security in Schools	More Spanish Speakers
	Increase support to English learners

	Leadership Development
	Recreational Opportunities (i.e. a space to hang out, para “que haya convivencia, más trabajo en equipo”)
	Teaching Students their rights

There are several patterns derived from the youth and parent recommendations that are worth underscoring. First, it is important to understand is that the conversations with parents and youth were largely grounded on the values of gratitude, belonging, and mutuality. When asked about how to improve LEI’s programing or about the future of LEI, participants largely responded first by sharing how thankful they were for LEI. This sentiment was perhaps best captured by the words of a mother who when reflecting on the future of LEI said that LEI should “*Seguir dando el cien por ciento y seguir dando ese grandioso servicio a nuestra comunidad.*” [continue to give their 100 percent and continue to give this marvelous service to our community]. Second, similar to the discussions with the CAB and staff, there were many questions and recommendations regarding LEI expanding its services. Finally, it is important to note that some of the recommendations made by parents and youth are in fact programs that are already in place at LEI. This suggests that the programs are in line with participants’ needs while at the same time bringing attention to the possibility that many participants as well as community members may not be aware of all the programs and services provided by LEI. Towards this end, in response to questions about what LEI should invest in the future, one parent said. “I would pay for the institute to have publicity. I have been here in Worcester for ten years and I didn’t know about this institute. I would pay so that everyone in the community knows about this place.” Increasing outreach and publicity is a topic that is subsequently further discussed.

#### *Finding 4: Critical Challenges and Outstanding Questions*

The strategic directions process also unveiled critical challenges and questions that LEI must address as it enters its 20th year. From an organizational capacity, six main challenges emerged:

1. **Organizational Structure:** While the LEI team was identified as one of the LEI’s most important assets, questions regarding the staffing model were raised. As of date, most LEI staff members are part-time (PT) consultants. This means that LEI, as an organization, spends a lot of time and resources developing the skills of a workforce that is constantly seeking new employment opportunities and that ultimately (and typically) leaves to other nonprofits who can offer better wages, stability, and career opportunities.<sup>9</sup> The PT staff expressed a desire to work full time for LEI, but it appears that there are few internal opportunities for professional growth at the full-time level. With the exceptions of the core staff, participants described LEI staff as being in constant transition. As it pertains to the core full-time staff (4),<sup>10</sup> there has been incredible and somewhat unprecedented (relative to the field of education and human services) stability in this team. However, in the last 18 months there have been changes in the leadership structure at LEI. The PT staff, in particular, has expressed a desire to gain more clarity regarding changes in the roles

<sup>9</sup> Several participants shared that LEI staff are often “poached” by other organizations.

<sup>10</sup> The core staff currently consists of Job tittle here. The core staff is often referred to as the leadership team.

and responsibilities of the leadership team. Likewise, CAB expressed a desire to review and reconsider the structure of the Board. Given the challenges of this past year, several CAB members shared that LEI could have benefited from a stronger board that was able to support the LEI team in more substantial ways, and assist in the planning and decision-making processes. This, some suggested, would require a shift from becoming a Board of Advisors to a Board of Directors.

2. **Programming Offering & the Expansion:** Questions about the number of programs, services, and the expansion of LEI services to other communities were raised at all stakeholder gatherings. For example, the expansion to Springfield and Southbridge, while well-executed, was often discussed as having taxed LEI's organizational resources. The Worcester staff, in particular, discussed how they were pulled from their programs in Worcester to support efforts in other communities and that this approach appeared to be unsustainable. Staff from other communities shared feeling disconnected from what was happening in the central office. There were also questions about the number of programs that LEI offers and the target population. Some participants proposed that LEI would be more effective if deepened its programming to certain populations (i.e. high school students); others recommended an expansion of services to underserved population (i.e. early childhood, adult learners). Most participants were unaware of the depth of programs the LEI offers.<sup>11</sup>
3. **Fundraising and Financial Sustainability:** Questions regarding the programmatic offerings and the expansion cannot be decoupled from concerns regarding LEI funding streams. Participants expressed that both the needs and interests exist so that LEI could in fact expand (either to other communities or locally by serving more student and families), however, the expansion, they suggested, should only occur if efforts are well funded. As such, questions about how LEI can become more financially sustainable were ubiquitous through the entire planning process.
4. **The LEI model and "brand":** The number of programs, the target populations, and the lack of a strong social media presence, were cited as challenges that impede LEI's ability to brand itself. To illustrate this challenge, there appeared to be a lack of clarity in describing LEI current programs and its historical partnership with WSU. Most participants had questions about the kinds of programs and events LEI has, suggesting that even within the primary stakeholders there was a lack of clarity about the LEI model. Some participants suggested it was time for LEI to rethink its programming approach, including its expansion goals so that it could fine tune its model. Others wanted more clarity on how to describe LEI's partnership with WSU. This lack of clarity regarding of all LEI programs should be decoupled from the satisfaction of programming. As previously stated, current and past data from surveys, focus groups, and this planning process suggests that there are high levels of satisfaction regarding the programs that stakeholders are aware of. This concern rather is more about the understanding and promoting the LEI brand given all of its programmatic components.
5. **Social & Political Climate and LEI's Advocacy Role:** The social-political environment in the nation and the city of Worcester has represented some serious challenges to the LEI. Families are living in fear and organizations are worried about how to best serve the public while avoiding political landmines. Several incidents in the city have raised racial tensions, particularly as it pertains to Latino students and their families. At a time when many Latino community members have felt belittled and ignored by the city's power structures and in particular the schools, *LEI has been criticized by both taking a stand and not taking a stance; by working with or not working enough with WPS.* Participants also expressed

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<sup>11</sup> A list of programs current program offerings is included in Appendix E

that LEI has at times been used as a scapegoat regarding the challenges that Latino students face. Some participants noted the need for LEI to develop a clear policy agenda otherwise it will often be responding to crisis. This was a thought-provoking recommendation given that LEI is *already involved* with developing the city's Latino Education policy agenda through its work with the Mayor's Commission on Latino Educational Excellence and Massachusetts Department of Higher Education Equity Agenda. This recommendation from stakeholders illuminates both the importance they play in LEI's policy work as well as ongoing challenge of stakeholders not being fully aware of the expansive nature of LEI's model and work.

6. **Current relationship with Worcester Public Schools (WPS):** Recent events strained the relationship between LEI and the district leadership. However, because of LEI's strong relationship with principals and staff at individual schools, this has not prevented the LEI from serving students. However, LEI must work on improving the relationship with WPS administration while at the same time recognizing that the Latino community critique of WPS and their leaders are legitimate.

#### *Finding 4: Opportunities for the Future*

Participants shared a strong commitment and excitement for LEI's future and discussed various opportunities that would strengthen LEI. First, all participants discussed that the changing demographics in the region and state bring attention to the importance of LEI's mission and work and this shift presents opportunities to strengthen and expand its efforts. With this frame in mind, the following opportunities were most salient in the discussions:

- **20th year Anniversary:** The 20th Year anniversary presents a timely opportunity to not only celebrate LEI's past contributions and future commitments to Latino students but unique opportunity to bolder LEI's organizational capacity. The 20<sup>th</sup> year was discussed a time in which LEI could develop and launch a new and long-term fundraising initiative which could include a capital campaign and getting multi-year commitments from corporate donors. The development of an endowment was also discussed. The 20<sup>th</sup> anniversary could also be the time when LEI unveils its new strategic plan, which could include new program and expansion goals. The 20<sup>th</sup> anniversary also presents an opportunity to reengage with CAB members and develop a plan of action that they will lead. Above all, the 20<sup>th</sup> year was described as an opportunity to design a future for LEI that is sustainable, inspirational, and continues to serve the needs of Latino students and families to the highest degree possible.
- **Requests for Expansion of Programming:** LEI often receives calls from communities, organizations, schools and other interested parties inquiring about how they too could have an "LEI" like program. This presents an opportunity for LEI to innovate its service delivery model. One idea discussed was developing a "franchise" like approach so that communities could launch their own LEI. Another idea discussed was for LEI to develop a Train the Trainers Model so that LEI can contribute to developing the capacities communities interested in developing programs that serve Latino students, while not having to run those programs itself. Several CAB also spoke of the importance of LEI continuing to develop and share curricula that celebrates Latino heritage in a way that is culturally sustaining and that can be used by schools, other programs, and the public at large. Finally, LEI staff also noted the importance of training their team members to better serve students who are or who may have family members that are undocumented, particularly as it pertains to college admissions and financing. Staff also discussed the importance of supporting the needs of Latino LGBTQI students and their families.
- **WSU Campus Renewals and Strategic Planning Process:** WSU is a growing institution that is also engaged in its own strategic planning process. Currently, the LEI team is uniquely positioned to contribute to WSU future directions- this is an important task, particularly as it pertains to the implementation of Massachusetts Higher Education Equity Agenda, which will ultimately have material considerable



consequences to the lives of Latino students both locally and statewide. Important to note that WSU renewal plans includes moving LEI to a more central location on campus. This will not only increase LEI's visibility within the university, it also presents an opportunity to strengthen ties to WSU faculty, staff, and students on behalf of the LEI.

- **Strengthening Research and Advocacy Agenda:** LEI was born out of local and statewide advocacy and organizing efforts. In other words, LEI's roots are deeply grounded on trying to address systemic barriers to improve the educational outcomes and experiences of Latino students through advocacy and organizing. Yet LEI does not have a 501c4 (political and/community organizing status), its work primarily focus on direct service provision, and it is part of a University that has a research, policy, and advocacy agenda. While these circumstances, along with current political climate poses serious challenges to LEI, it also presents a unique opportunity to clarify its own advocacy and research role.

## Strategic Goals and Benchmarks

After a review of these findings, working with initial feedback from the CAB, the following three strategic goals have been identified.

- I. **Telling Our Story:** This strategic goal emphasizes on sharing the power and uniqueness of LEI's model as an Institute of WSU dedicated to serving the Latino Community. The 20th anniversary celebration will be used as a tool to enhance our brand so that community and other stakeholders understand who we are and our story.
- II. **Growth: Expansion & Partnerships:** This strategic goal focuses on LEI's programmatic strengths. As part of this planning process, LEI recommits to creating a pipeline from K-20 through post-secondary education, to develop a Policy, Research, and Civic Engagement Plan in collaboration with WSU and the LEI CAB and to expand Services for adult learners in Collaboration with Graduate Division.
- III. **Sustainability and Strength:** This strategic goal focuses on strengthening the capacity of LEI to meet its mission and includes priority areas such as (1) Expanding Staffing Model; and (2) The role of the Community Advisory Board.

A planning timeline for strategic actions and timeline is included in **Appendix E:**

## SWOT Analysis 2019

As part of understanding the "big picture" of the LEI's current planning environment, the team participated in a SWOT Analysis, a widely used organizational planning technique used for understanding the *Strengths*, *Weaknesses*, *Opportunities*, and *Threats* an organization may encounter (See Appendix E for the full summary). Typically, *Strengths* and *Weaknesses* refer to factors that are internal to the organization's own development, while *Opportunities* and *Threats* relate to external factors that may impact organizational growth. For this exercise, "internal" was operationalized as factors that are directly related to the GI, rather than WSU in general. This is an exercise that the GI has used in the past to map out assets as well as priority planning areas. In preparation for the exercise, team members were asked to complete their own analysis as well as share their priority items with the larger group (Table 1: *2018 GI SWOT Analysis* represents a summary of the shared responses).

## Strengths

- **The LEI Team:** Committed to the mission of the Institute; capable & knowledgeable, caring, bilingual and culturally responsive; stable & well trusted core team; highly skilled team; deeply connected to Latino communities.
- **Well Respected by Latino Community:** Sustained commitment to the Latino Community; A trusted voice in the Community; Considered a leader in Worcester and Statewide; An organization that works hard to overcome challenges; An important advocacy voice; A proven track record of 20 years; Unapologetically Latino
- **High Quality Programming that make a Difference:** Programs are strengths based; serve a wide range of ages with a pipeline approach; measurable impacts in the community (LEI students doing better academically; graduating high school; going to college; staying involved in LEI, etc); Other communities want to replicate programs and model
- **Sustained Relationships with Students and Parents:** Students and parents Trust LEI staff, High parental engagement in LEI events; Participating in LEI programming gives families a sense of community; Student and parents are becoming community leaders
- **WSU Relationship:** Access to faculty and WSU students; Unique Model; Providing a home to WSU Latino students, Exposing families and student to the possibility of attending college; Promoting diversity and inclusion at WSU
- **Latino students at WSU**
- **Rapid and Well Executed Expansion:** Geographically and programmatically (To Springfield and Southbridge)

## Challenges

- **Overcapacity & Understaffed:** Most LEI members are PT consultants; LEI makes a lot investment in training staff, and they cannot retain them due low pay and PT status; Staff are often “poached” from other nonprofits because they offer better wages and opportunities; Programs (families, students, and partners) often feel like staff is in constant transition and that they have a revolving door of college students (turnover); Program staff feel like a FT model is necessary to meet all the responsibilities they have; There are very few opportunity for internal growth.
- **Expansion:** The expansion to Springfield and Southbridge taxed LEI’s organizational resources. While staff discussed the importance of expansion goals, many shared that expansions efforts were “taking away” time from their work in Worcester. The commuting back and forth, particularly in the winter, was referenced as particularly cumbersome, to those who were not aware that their work would entail “so many hours” working outside of Worcester. Other shared that model that Worcester staff “run” programs in other communities was not sustainable. Staff from other communities shared feeling disconnected to what was happening in the central office.
- **Fundraising and the budget:** In all sessions, participants shared concern about the fundraising and the budget relative to vision of LEI. All agreed that fundraising and having a stable budget is an important priority and a current challenge.
- **Visibility and The LEI brand:** LEI does not have a strong social media presence or marketing/outreach campaign; it was reported that program participants often don’t know that their program is part of LEI; In addition, participants, raised questions about the number of programs that LEI offered. Some suggested it was time for LEI to stream line based on priority populations or area of interest. Other suggested that programs work in silos and are resistant to change. Defining the LEI brand requires a look at the programs and the populations LEI serves.

- **Explaining the WSU partnership:** There is lack of clarity on describing the nature of the partnership with WSU. Is LEI at, of, or with WSU? Others felt that LEI itself needed to work on strengthening the relations with WSU in order to improve the experiences of Latino families and students on campus. How can the relationship improve for the benefit of the community?
- **Space & Location:** Space is not easily accessible to families (not near Latino communities; Transportation to and off campus is a substantial line item in LEI's limited budget, space is too small and segments (in two different locations) which can contribute to communication challenges
- **Lack of Clear Policy and Advocacy Agenda:** While many discussed the important role, LEI plays in advocating for the needs of Latino students and families, others noted that LEI does not have a clear policy agenda and therefore it often responds to crisis as they come. There is a lack of clarity regarding LEI's advocacy role both in terms of individual families (advocating for rights of individual students in WPS and/or WSU) and system wide changes.
- **Roles and Responsibility of CORE staff:** In the last 18 months there has been a change in the leadership structure at LEI. Staff have a desire of gaining more clarity regarding roles and responsibilities of the leadership.
- **Lack of Programming for Students at WSU:** Latino WSU students often arrive at LEI seeking support as there are no programs on campus that specifically focus on supporting the academic and social needs of first-generation low-income Latino students. LEI works with students, even though it does not have a program to do so.
- **Programs often work in Silos:** Program staff reported the need to improve communication between programs in order to avoid silos.

## Opportunities

- **Growing Latino student population in Worcester and statewide:** The changing demographics in the region and state bring attention to the importance of LEI mission and work and the WSU efforts
- **Ongoing Requests for Expansion/Trainings:** LEI often receives calls from communities, organizations, schools and other interested parties inquiring about how they too could have an “LEI” like program. This presents an opportunity for further expansion or for the creation of Franchise/Train the Trainers Model. LEI must consider new and innovative ways to address seeking fee for services consulting work.
- **20th year Anniversary:** The 20th year anniversary presents a timely opportunity to illuminate the work of LEI more broadly but to also acknowledge the anniversary as an opportunity to share with the public LEI’s vision for the future. The 20th Year celebration also presents a unique opportunity to develop a long-term fundraising initiative. This includes new sources of funding including an annual appeal campaign and endowment funds.
- **WSU Campus Renewals and Strategic Planning Process:** LEI is positioned to contribute to the future directions and priorities of WSU. There is also a plan to move LEI to a larger and more central space on campus, which will bring increasing visibility to the programs and the Latino community on Campus.
- **Faculty at WSU:** Faculty at WSU are a potential partner that can be better used. They can strengthen LEI’s research arm, as well as assist in supporting the needs of Latino students on campus.
- **Socio-political climate increased awareness relevance of our work:** While the current political climate posed serious challenges to LEI work, it has also served as opportunity to refocus on LEI’s strengths, to identify and strengthen relationships with allies, and it has brought attention to the mission of the LEI.
- **Social Media and Online Presence:** We can relatively easily boost our online presence, community presence, ties to other civic Latino-serving organizations, and state legislators using new media outlines. Our online presences should also be connected to research hand data center (see Pew Institute). It can also serve to draw web traffic to our site, raising our profile within and outside the university.

## Threats

- **Current Socio-political context:** Racism, sexism, xenophobia, fascism (etc.) neo-liberalism are threats to the LEI and the populations we serve. Families are living in fear; organizations are worried about how to best serve the public, while avoiding political landmines.
- **The political climate at Worcester:** Worcester has an insular power structure where Latino communities are largely left out. Recent events have brought to light how the broader national climate is lived locally. Many organizations (formal and otherwise) have begun to organize to make Worcester a more equitable community- and they have received a lot of pushback from leaders and organizations that are not willing to relinquish their power. In these debates, LEI is often escape goated by various parties for both not doing enough, as well as doing work “we are not supposed to.”
- **Current relationship with Worcester Public Schools:** Recent events has strained the relationship between LEI and WPS administration. Because LEI works in schools and WPS students, a strained relationship can hurt LEI’s abilities to best serve families. As such, LEI must work on improving the relationship with WPS while at the same time recognizing the Latino community critiques of WPS are legitimate. Some community organizations have criticized LEI for wanting to work with WPS leadership; this is also a threat to LEI as LEI is strengthen by the community organizations it works with. There are also internal politics are play that prevent LEI from having a stronger advocacy stance, including that fact that is part of WSU, a publicly funded IHL.
- **Funding Trends:** LEI is competing for funding (grants) in a very competitive marketplace. Proposal writing is also very labor intensive. Foundations are largely seeking to fund independent nonprofits that have a board of directors with organizational power. Questions regarding how to best work with WSU foundation were raised. For example, a more coordinated approach to which grants and contracts are best suited for LEI and more support on grant writing?

- **Commissioner's Santiago Equity Agenda:** The Commonwealth Equity agenda provides a framework which WSU and LEI can follow to inform their strategic planning processes. The agenda also emphasizes the importance of models like LEI, given shifting trends in the Commonwealth.
- **Curriculum & Instruction Programming:** Developing a process to develop (and share) culturally sustaining curricula to LEI students and for other organizations to use is an opportunity that merits exploration.

- **Limited Latino media:** The lack of strong and visible local Latino media in Worcester poses a challenge to communicate and outreach with the Latino public at large. The lack of the Latino media also contributes to the invisibility that LEI often feels.
- **WSU structure often impacts LEI; s ability to grow.** There are many procedures, and administrative tasks that LEI must adhere to which often impact its ability to make decisions and quickly implement them.

# Strategic Priorities Benchmark

## TELLING OUR STORY

**Goal 1: Enhance our brand by emphasizing our uniqueness as an Institute of Worcester State University dedicated to serving the Latino Community**

Actionable Items	Short Term	Long Term	Desired Outcomes
Organize anniversary events to celebrate LEI achievements over the past 20 years. ( <i>Showcase history, accomplishments, partners, and future directions</i> ).			
Create a marketing plan in collaboration with WSU marketing department.			
Establish an annual appeal that targets LEI alumnus.			

**Goal 2: Re-affirming our story through alumni success**

Actionable Items	Short Term	Long Term	Desired Outcomes
Create Alumni Network (Friends of the Latino Education Institute).			
Highlight alumni accomplishments in marketing materials including WSU and social media			
Host alumni networking events and invite LIDER students.			

**Goal 3: Get statewide and national recognition**

Actionable Items	Short Term	Long Term	Desired Outcomes

Present at regional and national conferences featuring evidence-based models of success for Latino students.			
Join strategic statewide and national efforts that tell similar stories, including Mass Association of Bilingual Education (MABE), Massachusetts Education Equity Partnership (MEEP), IUPLR – Inter-university Program for Latino Research, the national organization for all Latino-focused institutes in higher education, Excelencia in Education, Hispanic Association of Colleges and Universities (HACU).			
<b>GROWTH AND EXPANSION</b>			
Goal #4: Create alignment (K-20) for Latino Students			
<b>Actionable Items</b>	<b>Short Term</b>	<b>Long Term</b>	<b>Desired Outcomes</b>
Develop a formal mentoring component with LIDER and WSU Latino students.			
Become a success coach for WSU Latino students			
Work with WSU student life to support Latino students in creating a club that enhances the quality of WSU experience for students.			
Goal #5: Develop and Implement Statewide Policy and Research Agenda			
<b>Actionable Items</b>	<b>Short Term</b>	<b>Long Term</b>	<b>Desired Outcomes</b>
Establish a system of faculty affiliates and faculty advisory committee that works to articulate a policy and research agenda connected to community concerns.			

Continue to invest in the development of PEAS, a statewide coalition of Latino leaders in higher education, K-12, and early education practitioners. PEAS facilitate statewide policy, research, and programming and is connected to all three MA education commissioners.			
Host an annual gathering (Amplifying Latino Student Success) with allies from other LEI communities, including Springfield and Southbridge.			
Goal #6: Expand Technical Assistance Capacity			
Actionable Items	Short Term	Long Term	Desired Outcomes
Pilot a fee-based service for adult learners in collaboration with WSU graduate division			
Develop LEI's programs as a model for districts and organizations interested in Latino student Success.			
Work with WSU to figure out ways to help meet the Higher Education Equity Agenda.			
SUSTAINABILITY AND STRENGTH			
Goal #7: Expand Staffing Model			
Actionable Items	Short Term	Long Term	Desired Outcomes
Establish WSU graduate assistantships to ensure LEI's ability to consistently assess program metrics, goals, and objectives.			
Expand our evaluation capacity through faculty			



Fund a Curriculum Specialist to package and adapt curriculum for external audiences.			
Explore a cohort model of WSU bilingual students that do work-based learning in K-12 programs.			
<b>Goal #8: Role of Community Advisory Board</b>			
<b>Actionable Items</b>	<b>Short Term</b>	<b>Long Term</b>	<b>Desired Outcomes</b>
Work with WSU Faculty and CAB to develop an education policy agenda with civic engagement components for youth voice and parent voice connected to improving public education.			
Establish working committees with LEI CAB and WSU faculty to support LEI's strategic plan.			
Establish a committee that works to strengthen collaboration with Worcester Public Schools.			