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1.0 Relevant Case Studies

We have completed distinctive, specific and relevant projects where our approach achieved success for higher education and K-12 organizations.

Case Study	Operational Excellence	Strategy	Part-nerships	Student Experi-ence and Enroll-ment	Economic Develop-ment	Capital Planning and Manage-ment	Bench-marking	Executive Manage-ment Mentoring/ Coaching
University of Arizona – Strategic Planning	X	X		X	X		X	X
Delaware State University – Acquisition and Integration Transformation		X	X			X		X
University of Colorado – Boulder – Financial and Operations Transformation	X	X		X			X	X
Virginia Polytechnic Institute and State University – Business Plan for "Innovation Campus"		X		X	X	X		
University of Michigan – Net Zero Plan 2040		X				X		
UNC – Chapel Hill – Operational Excellence Transformation	X	X					X	X
University of Utah – Holistic Transformation	X	X		X		X	X	
Dallas Independent School District – Technical Assistance and Procurement	X	X						
Washoe County School District – Strategic Planning and Capability Building		X						X
Issaquah School District – Strategic Planning		X		X				

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1.1   Case 1: University of Arizona

University of Arizona – Strategic Planning	
Period of Performance	December 2017 – March 2019
Relevance	
The University of Arizona is a robust case example of a successful strategic transformation at a large public R1 university that used our proven approach for strategic planning, stakeholder engagement, and identification of current and future opportunities.	
Description	

The University of Arizona had recently changed several senior leadership positions, including the president. With leadership instability in the past, prior strategic plans were not implemented. In parallel, the University saw a decline in the US News and World Report rankings and was stagnant on key impact metrics (e.g., research activity). During this period, the University was also focused on growing the student population, which came at the expense of academic preparedness and ultimately retention and completion. Finally, the University is situated in a state with limited public funding and relies largely on tuition and research funding.

Working closely with university stakeholders, McKinsey helped the University develop an institutional strategic plan with pillars focused on: Student Success and Enrollment, Research Excellence, Diversity and the Arts, Innovation, Global Preeminence, and Institutional Effectiveness (e.g., organizational, administrative, and operational improvement). Beneath the pillars were 90+ strategic initiatives developed through broad input and syndication. As the University prioritized transparency and engagement, the implementation planning team engaged over 10,000 stakeholders to provide input on the plan.

Input from the broader University community was solicited through weekly meetings with school and college deans and the Presidential Cabinet Advisory Council. This was supplemented with broader campus stakeholder engagement through focus groups, design teams focused on specific themes, town halls, a comprehensive survey, and one-on-one planning meetings with staff and faculty.

Over a period of five months, McKinsey supported development of a charter, detailed business plan, and implementation plan for each initiative. The McKinsey team worked with staff and faculty to build an execution mindset to ensure that the plan was implemented. McKinsey supported initiative owners, who were accountable for discrete initiatives, with development of ideas and capability building to lead execution.

Our Approach
The McKinsey team followed an inclusive and participatory process organized in two phases to ensure that all University stakeholders were included and owned various elements of the transformation. The phases were as follows:

Phase I: Strategic Plan Development focused on:
- Reviewing institutional data, previous and ongoing work, external benchmarks, and trends in higher education to understand areas of strength and opportunity across a multitude of functional areas
- Conducting key stakeholder interviews and hosting focus groups, town halls, and meet-ups to build engagement for the plan and solicit input
- Launching design teams to provide input related to targeted focus areas for strategy
- Prioritizing strategic pillars and initiatives using evaluation criteria and structured leadership prioritization workshops
- Executing broad communication and marketing plan to inform the university and key stakeholders (e.g., alumni, donors, elected officials) of strategic plan progress

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University of Arizona – Strategic Planning

Phase II: Implementation planning that entailed:
- Launching the Strategic Planning Delivery Unit to serve as the central project management office driving the implementation planning cadence to ensure all deliverables are completed in a timely and detailed manner
- Designing and delivering capability building curriculum based on skill gaps of the delivery unit team members and building skills needed to implement the strategic plan to over 200 campus participants
- Identifying the full list of initiative owners with key stakeholders for all strategic plan initiatives who are accountable for the final deliverables and subsequent implementation
- Hosting kickoffs and trainings to set expectations for implementation planning, working norms, level of detailed required, and how to use McKinsey project management tools and software such as 'Wave'
- Developing implementation planning deliverables for each initiative including a charter outlining the goal of the initiative, the key enablers (e.g., people, process, technology) needed to realize the goal, and the key stakeholders to engage; a detailed business plan outlining financial impacts (e.g., revenues, expenditures, cost savings, donor funds, and grants) over the next five+ years with the associated underlying assumptions and the KPIs to track progress; and detailed implementation plans with milestones and owners needed to execute the initiative and meet the initiative goals, KPIs, and financial impacts in a timely manner
- Engaging more than 5,500 faculty and staff across these workstreams through development of charters, detailed business plans, and detailed implementation plans including a roadshow to all University colleges and business units
- Launching an Organizational Health Index survey to identify the key areas to focus on to prioritize the health of the organization
- Drafting a package of fundable initiatives, with significant input from development team and potential donors that includes an overarching strategic vision and campaign narrative
- Developing a compelling narrative and detailed strategy ready for approval by the University's board that is a finalized, exhaustive strategic document outlining the strategic plan and the detailed initiatives

Impact of our work

As a result, 90+ independent, University-owned initiatives were evaluated that would support the Strategic Plan and the associated goals of the plan. The wide scope of initiatives has already created the following impact in a three-year window:
- Five-point increase in first-year retention rate and four-year graduation rate, from 81 to 86% and from 49 to 54% respectively
- Twenty-eight-percentage point increase in average SAT score of entering first-year students, from 1,228 to 1,256
- Fifteen percentage point increase in the share of first-time, full-time students with a 3.75+ unweighted core GPA, from 25 to 40%
- $148M (24%) growth in research expenditures over a four-year period
- Expansion of global micro-campuses from eight to 13 to expand impact and access
- 20% growth of access for Pell-Eligible recipients
- Twenty-seven place rankings increase

Our work on the University's health sciences strategy resulted in 26 initiatives to:
- Reduce average graduate student debt and make education accessible for all;
- Reduce the shortage of primary care physicians in state of Arizona;
- Become a premier health sciences innovation center with increased inventions, license agreements, and funded startups
- Increase population aging-in-place; and increase global opportunities for students

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University of Arizona – Strategic Planning
• Planning and implementation process engaged 500+ stakeholders to achieve both pragmatic (e.g., funding and implementation feasibility, engages all schools/centers, builds on strengths) and visionary (e.g., impact at scale, addresses global challenges) outcomes

1.2   Case 2: Delaware State University

Delaware State University: Acquisition and Integration Transformation	
Period of Performance	2020 – 2023
Relevance	
Delaware State University defined a clear strategic vision for its potential acquisition of Wesley College. They aspired to grow their business models through the addition of 14 new programs and expanding access to more learners, while also discovering and validating synergies and growth opportunities at the combined institution. Both DSU and Wesley had been operating at a net deficit in recent years. Each faced challenges: Wesley had declining enrollment over the past several years, while DSU had historically relied on state funding to offset its growing operating deficit. The Board enlisted McKinsey to perform an independent diligence of synergy opportunities and work with university stakeholders to stand up performance, culture and change management infrastructure to drive the transformation. This project demonstrates McKinsey's partnerships service area, particularly in terms of the assessment of potential partnerships with an institution's goals.	
Description	
Phase I: Independent Diligence Phase McKinsey performed an analysis of current and future state opportunities, including organizational structure and internal challenges. Our analysis utilized comparisons to peer institutions, market research, and internal benchmarks. We provided DSU with defined value capture cost and revenue synergy targets for the combined entity, a starter list of initial opportunities, and a 5-year financial forecast. **Phase II: Detailed and Data-Driven Planning** As a part of the transition plan, the McKinsey team developed a set of recommended options to move forward, which informed an end-to-end roadmap for acquisition and broader transformation. We guided institutional leadership in establishing key workstreams, working team cadence, and governance infrastructure to drive the transformation. We then supported leadership in executing the plan by helping to establish an Integration Management Office led by a senior leader from DSU and Wesley to engage and deliver value to all stakeholders. We also provided additional insight with a weekly and conducted 3 planning summits to ensure organizational readiness, integrate constituencies, and share lessons learned on other relevant initiatives. This experience demonstrates our expertise in supporting an institution in achieving operational excellence. To do so, we supported the articulation of a clear strategic vision, which included synergies between the two institutions, and prioritizing business models closely linked to growth. To support the value of the acquisition we identified acquisition synergies, mapped marketplace opportunity analysis, did value sizing. To support the integration, we defined potential organizational structure and readiness, and developed transition plans. Finally, we have partnered with the client longer term, supporting the institutional leadership in the implementation, ensuring continued stakeholder engagement, and applying lessons learned in a continuous agile format.	
Impact of our work	

Delaware State University: Acquisition and Integration Transformation

- Opportunities identified include reduce external vendor spend through renegotiation of large and overlapping contracts; assessment of low-enrollment and overlapping programs; driving increased enrollment through improved yield and top-of-funnel growth; increasing retention through improved student support in newly enrolled freshmen class; driving auxiliary revenues from real estate through leasing of non-essential buildings / repurposing for academic purposes
- Identification of key priorities and enablers to ensure successful integration
- Ensured a smooth integration with target institution by evaluating the institution's ability to execute, and identifying key watchouts

What we achieved together:

- 1st HBCU to acquire another institution informed through support on diligence and integration
- 23% more students served since 2020—including from acquisition; fastest growing HBCU in the country
- 14 new academic programs launched in strategic priority areas
- 150 faculty, staff, and administrators engaged in developing the "fresh growth" transformation plan, including initiatives designed to enhance student outcomes, increase institutional sustainability and build organizational health
- $40M+ of improvement in revenues and expenses, representing 20+% improvement in both categories
- 50 Core Delaware State University leaders embarked upon a leadership capability-building journey
- 1st HBCU to establish a dedicated customer service center of excellence designed to improve student and university stakeholder experience

1.3   Case 3: University of Colorado – Boulder

University of Colorado – Boulder – Financial and Operations Transformation	
Period of Performance	June 2018 – June 2022
Relevance	
In this project, we conducted a comprehensive assessment of the student services, academic programs, and recruitment strategy at a public R1 flagship university, designed to improve enrollment and retention. This included examining processes, services, and resource allocation in and across core functional areas for potential cost reduction and efficiencies aligned with strategic priorities.	
Description	
The University of Colorado Boulder wanted to increase its return on mission by creating the financial and operational capacity to reinvest in its ongoing and future strategic initiatives. While enrollment had risen in recent years, so had the costs of providing high-quality programs, with expenses increasing at the same rate as revenues in recent years. Through a data-driven assessment of current performance, CU Boulder identified cost savings, (e.g., through procurement, program efficiency and administrative functions) opportunities for growth in existing revenue streams (e.g., enrollment, research, auxiliaries) as well as new areas of opportunity (e.g., non-traditional programming). This view of 'full potential' provided a foundation for decision making and the ability to develop a clear implementation approach including a view of the organizational capabilities necessary to realize these opportunities. Working closely with university stakeholders, and leveraging prior work, external peer benchmarks and our codified best practices, McKinsey defined a roadmap of opportunities to provide both near-term operational improvements and ensure long-term financial growth. ~75% of the total opportunity identified focused on revenue improvement and 25% on cost reduction and efficiency. We subsequently partnered with the University on an operations and financial transformation effort	

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University of Colorado – Boulder – Financial and Operations Transformation

that established the process and capability to deliver 10-15% annual budget value improvement for the University over the long-term.

Our Approach: Central to our approach was a focus on CU Boulder's two primary objectives: 1) sustainably support ongoing and future strategic initiatives 2) engage campus stakeholders to build a culture of change.

Phase I: Comprehensive diagnostic on academic outcomes and financial sustainability
- Reviewed current institution-wide financials to build a current state baseline, leveraging prior and in-progress work where relevant.
- Conducted a deep-dive analysis of the University's cost functions. In our analysis, we leveraged McKinsey's functional depth in procurement, organizational design, and program efficiency to identify opportunities for efficiency gains aligned with strategic priorities.
- Identified opportunities to increase revenue through growth in enrollment, research, and auxiliaries as well as the potential for new revenue growth through a launch of non-traditional programming.
- Conducted a thorough review of operational activities and functions; 19 opportunities (of a total review of 50 areas) were prioritized that aimed to improve student outcomes, build scale and reduce duplication of activities across areas of the institution
- Engaged over 100 stakeholders (e.g., faculty, staff, students, alumni and board members) through one-on-one interviews and focus groups to surface ideas and contextualize the fact base in this initial phase; developed a tailored engagement and communications plan based on an assessment of stakeholder groups and the relevant change impacts
- Built an understanding of broader organization health and the cultural shifts and change management required to ensure successful implementation and sustained impact

Phase II: Solution Design
- Guided University leadership to define targets based on a set of criteria informed by their strategy and ambition to reinvest in their mission
- Worked with University faculty and staff to define workstreams for each of prioritized opportunities with clear outcomes and accountable owner(s)
- Engaged over 300 University staff and faculty to define more than 250 initiatives; coached and supported University faculty to build key artifacts including business cases, KPIs, and detailed implementation plans (e.g., tasks, timing, owners and contributors) for each initiative
- Synthesized all initiatives into an overarching roadmap and action plan (with $200m+ in value to be delivered) to enable resource planning and investment allocation; partnered with leadership to align on overall sequencing and quick wins
- Introduced a new financial planning model to create a transparent and granular view of sources and uses of funds across the institution; embedded a discipline of scenario planning to understand and manage variation in outcomes and potential shocks
- Established a project management structure and processes to provide active governance including monitoring progress, surfacing and escalating roadblocks, and reporting on impact
- Supported leadership to engage the broader University community through townhalls and roadshows aimed at establishing greater understanding and awareness of plans and rationale as well as to invite participation

Phase III: Implementation
- Leveraged McKinsey's Ability-to-Execute capability program to strengthen execution capacity across the institution (>250 participants in the program) and reinforce a culture of continuous improvement to sustain and enable future change.
- Partnered with University initiative owners to drive execution; established a rhythm of weekly meetings with workstream leaders to track progress against plans and problem-solve any barriers to implementation.
- Reported key metrics to University leadership including escalation of critical issues.

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University of Colorado – Boulder – Financial and Operations Transformation
• Conducted progress and impact reviews to ensure good stewardship of resources and true benefits being achieved; where appropriate, identified new initiatives or pivots to existing initiatives to achieve great impact. Transitioned ongoing program management to the CU Boulder Transformation Office; over a six-month period, built the capabilities of the four person team to ensure they were equipped with the skills and capability to achieve the long-term impact.
Impact of our work
• Developed plans for new educational offerings to complement current revenue streams (e.g., innovative online programs and expansion of executive education and professional offerings).   • Financial impact realized and projected: $32M realized in year FY21, $105M realized in FY22, $139M projected in FY23, $190M projected in FY24.   • CU Boulder stakeholders focused on freeing resources for future strategic initiatives across the full range of academic and non-academic programs.

1.4   Case 4: Virginia Polytechnic Institute and State University

Virginia Polytechnic Institute and State University – Business Plan for "Innovation Campus"	
Period of Performance	September – October 2018
Relevance	
Developing the business plan for the "Innovation Campus" with Virginia Tech provides an example of how McKinsey has effectively supported on economic development strategies related to growth and job creation.	
Description	
McKinsey worked with Virginia Tech to develop the business, operating, and financial plan for its "Innovation Campus" located in Northern Virginia. The one-million square foot, $1 billion campus is envisioned as a new satellite location for the Blacksburg-based university in Northern Virginia. While the concept was developed as part of the state's proposal for Amazon's HQ2, there was not much defined in the way of the strategic or operational design choices for the campus. McKinsey helped build the vision of the project, engaged with developers and the government, and worked across various stakeholders throughout the study. In concert with the "Innovation Campus" strategy effort, McKinsey collaborated to support the successful bid by the region to attract and incorporate Amazon HQ2 into the campus. We partnered directly with the real estate developer, JBG Smith, to develop the broader strategy including community assets and housing and to develop market and financial analysis in support of each major investment area including infrastructure. McKinsey's assessments and the resulting work included the following: • Reviewing the existing strengths and assets of Virginia Tech, including distinctive elements of the University's value proposition and areas of national leadership • Developing the mission, vision, and objectives for the "Innovation Campus," including the annual outcomes the campus would deliver across degree production and programs • Designing key programming components of the "Innovation Campus," including mix of academic, innovation/entrepreneurship, and community events that would support the vibrancy of the campus • Providing benchmarking and analytical support to pressure test key decisions and goals around	

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Virginia Polytechnic Institute and State University – Business Plan for "Innovation Campus"
the operating and financial plan (including developing a real estate and tenant strategy, operating and governance models during campus development and steady state, and target sources and uses of funds to ensure campus sustainability)
• Drafting an action plan with key milestones, including an overall phases plan, as the campus is rolled out
• Partnering with the real estate developer in a follow-up effort to define the building and infrastructure strategy and develop financial plans to support the development of the campus and infrastructure

Impact of our work

The "Innovation Campus" plan was developed and included as part of the state of Virginia's winning bid for Amazon's HQ2 location efforts and was touted as the centerpiece of the state's strategy to success in winning and delivering on the promise of HQ2. A publicly available copy of the "Innovation Campus" proposal was posted on the state's website with the documents part of the HQ2 submission and can be found at:
https://hqnova.com/assets/pdfs/Virginia_Tech_Innovation_Campus_-_A_Proposal_-_October_2018.pdf

Virginia has committed to $250M+ of funding for the effort, with a 1:1 match from the University, and fundraising for the campus is underway. The "Innovation Campus" recently announced a partnership with a local real estate developer and finalized its location for a 15-acre site.

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1.5 Case 5: University of Michigan

University of Michigan – Net Zero Plan 2040	
Period of Performance	April 2024 – May 2024

Relevance

We performed a large-scale project with the University of Michigan to build a pathway to net zero by 2040. This project demonstrates our experience in program design and highlights our expertise in identifying, assessing, and prioritizing decarbonization levers and designing programs for Capital Planning & Management.

During this work we leveraged novel technologies (proprietary machine learning tools to build individual pathways for 500+ buildings) and integrated efficiency measures (including centralized and building-level heating and cooling systems, and heat pumps).

Description

A full-time McKinsey team helped the University of Michigan by:

- Utilizing RECAP.ai and subject matter expertise to identify the most relevant decarbonization levers, assessed lever impacts, and designed a comprehensive decarbonization plan
- Developing a detailed year-by-year integrated roadmap for building retrofits, energy infrastructure, scope 2 emissions, and total EV fleet transition – collaborating closely with engineers, finance teams, and the broader community (over 5,000 individual levers sized for costs and energy impact)
- Identifying key enablers for successful execution of the plan including changes to resourcing, capital processes, and institutional policies
- Conducting 50+ working sessions with stakeholders to gather input and co-create roadmaps

Impact of our work

- $300M+ CAPEX cost savings by decarbonizing campus infrastructure in a coordinated transition
- $350M+ OPEX energy savings through 2040 by increasing energy efficiency early
- 3.9Mt CO_2e cumulative emissions avoided through 2040 by following a coordinated decarbonization pathway relative to a business-as-usual pathway
- Near neutral NPV.

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1.6   Case 6: UNC Chapel Hill

UNC Chapel Hill – Operational Excellence Transformation	
Period of Performance	September 2018 – June 2019
Relevance	
The University of North Carolina provides a case example of an ambitious, forward-facing transformation in which we conducted deep functional assessments in HR, Finance, and Research Administration to identify opportunities for improved efficiency, effectiveness, stakeholder satisfaction, and financial alignment.	
Description	

The UNC Chapel Hill HR wanted to improve operations to accelerate the performance and outcomes of the institution. This was partly a result of several organizational effectiveness issues facing the university. For example:

- Lack of synchronization of the HR function's objectives with the strategic plan of the institution.
- Slow processes and unclear budgeting inhibiting the ability to attract top talent.

A change in university leadership commissioned a project to turnaround the HR function, which was poorly received by the organization. Therefore, The University engaged McKinsey to deliver a holistic organizational transformation in phases:

Diagnostic: Three sources of insight were used to diagnose root cause of HR bottlenecks
- Quantitative diagnostic: Baselined performance unit by unit to determine variation and compared to best practices
- Qualitative interviews: 50+ interviews conducted across to complement gap analysis and benchmarking findings.
- Best practices inspiration: Gap analysis to compare university practices to best practices in higher-ed and other sectors.

Functional re-design: Leveraging the findings of the diagnostic, a future-state vision was defined with clear recommendations for the redesign in the form of bold initiatives to achieve recommendations including:
- Future state vision: A future state vision that communicates how the function will operate in 5 years.
- Re-design recommendation: 2-3 big ideas that will lead to significant change in the function/achieve the future state.
- Detailed initiatives with owners: Initiatives with detailed supporting actions and owners.
- Performance management plan: Plan to begin gathering data and date for first dashboard delivery.
- Implementation roadmap: Sequenced initiatives over and vision of change over 6,12- and 18-month time frames.

Initiative implementation: The functional re-design process identified 8 initiatives to transform HR. These were prioritized via a long-term implementation plan a) design b) pilot c) scaling to the organization. Based on the change capacity of the university, this implementation plan was completed over the course of 2019-2021.

Impact of our work

1. Launched pilots to improve core processes (e.g., recruiting cycle time), guided by target metrics.
2. Reduced non-faculty hiring time from ~90 days to ~45 days across the entire university over the course of 6 months.
3. Engaged 400+ stakeholders in series of focus groups and listening tours, leading to improved implementation,

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UNC Chapel Hill – Operational Excellence Transformation

4. Implementation plans carefully consider existing norms, change management needs, and organizational capacity for transformation (e.g., avoids overly aggressive implementation cadence where at odds with organization's)
5. HR function is now seen as a proof point for the value that improving operations can bring to the university.

1.7   Case 7: University of Utah

University of Utah – Holistic Transformation	
Period of Performance	September 2023 – Present
Relevance	

We are supporting the University of Utah to help them realize aspirations across finance, operations, culture change, and project execution. We leveraged financial models and 500+ data sources to prioritize opportunities in academics and administration, and engaged 100+ university leaders and 30 experts. We are confident that our experience partnering with large university systems on successful transformations – from assessment to design to implementation and capability building – demonstrates our ability to drive sustainable and inclusive change across the E&I network.

Description

University leadership had a bold aspiration for the impact of the university and its stature as a public institution. McKinsey was engaged to support achieving this aspiration with 4 core objectives:

- Ensure financial sustainability & unlock resources to invest in realizing the university's mission and vision and delivering sustainable growth
- Improve the way the university operates – efficiency, experience, and effectiveness
- Sustain change by supporting a shift in culture
- Build an execution engine to constantly elevate and accelerate ideas that can continue to enhance the university's mission and vision

Our Approach:

[Completed] Phase 1: Aspirational Assessment

- Developed integrated view of current state and future trajectory, including full scenario-based financial model and cash flow analysis
- Prioritized mission-aligned opportunities to pursue (based on qualitative and financial impact and ease of implementation), setting bold impact targets for future
- Opportunity areas considered include:
    - Academic enterprise: undergraduate and graduate enrollment, including marketing and online; student success (i.e., retention and persistence); research and commercialization
    - Operations: procurement; capital productivity, facilities, and real estate; auxiliary enterprises; advancement
    - Enablers: administrative operating model service delivery; and change management and capability building
    - Analyzed 500+ internal and external data sources, including proprietary data sets across 5+ years of data & benchmarked university performance to 20+ comparable and aspirational peers
    - 100+ university leaders engaged in interviews and review of findings, along with 30+ external experts

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University of Utah – Holistic Transformation

      o Focused on opportunities that could deliver: improved student research outcomes; a better student, faculty and staff experience; and potential annual net operating impact of >$100M

[Completed] Phase 2: Bottom up Planning
- Developing menu of projects with data-backed implementation plans (including robust business cases) to deliver on opportunity potential identified in the aspirational assessment phase
- Engaging 20+ senior leaders to lead project development from 100+ project owners across "workstreams," or opportunity areas (e.g., enrollment, procurement)
- Standing up Transformation Office infrastructure that will drive transformation / implementation of projects; intent is to develop an execution engine / implementation muscle that can constantly elevate and accelerate development and implementation of great ideas for the institution
- Preparing for change management required to execute effectively and sustain change

[Current] Phase 3: Implementation
- Launched and preparing the team that will sustain this work in the future
- Starting delivery on full potential of impact targets by implementing projects designed in prior phase
- Building capabilities across the university to execute effectively to sustain change (including side-by-side coaching and leadership workshops)
- Managing through roadblocks / overcoming challenges to ensure sustainability and delivery on the aspiration with focus on change management
- Engaging other areas of the university for additional rounds of planning to expand the impact opportunities

Impact of our work

Our work with the university is still ongoing, but the following are outcomes of our work completed to date:
- $100M+ potential annual net operating impact from growth opportunities and cost avoidance and/or savings opportunities
- 80+ priority projects identified for implementation from 900+ ideas generated from 200+ staff and faculty
- Full client-hired and owned implementation / delivery team being onboarded and coached to carry implementation and impact delivery forward

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1.8   Case 8: Dallas Independent School District

Dallas Independent School District – Technical Assistance and Procurement	
Period of Performance	June – October 2021; April – June 2022
Relevance	

Our work with this school district highlights our experience engaging stakeholders to improve Operational Excellence with K-12 organizations working to accomplish ambitious goals in a more resource-efficient and timely manner

| **Description** | |

Dallas ISD is the 2nd largest school district in Texas and the 16th largest in the nation, serving ~150K students in PK-12, over 90% of which are students of color. The District received over $800M in ESSER I, II and III funds to combat COVID-19 associated challenges, including learning loss and chronic absenteeism. Administration of ESSER funding across the District presented significant challenges, including determining where to allocate funds across 100+ initiative proposals and establishing performance management of funded initiatives. Collectively, these challenges posed roadblocks to ensuring the $800M in ESSER funding translated to impact for students.

After finalizing their ESSER plan, the district was **facing challenges in getting priority strategic initiatives through Procurement**, including tutoring, afterschool programming and device expansion

What we did

We partnered with the former Dallas ISD Superintendent on a few leading priorities. Our team provided intensive support to establish clear performance management systems for planning, launching, and managing performance of >100 ESSER initiatives to ensure highest impact of the $800M funding portfolio on addressing student challenges (e.g., learning loss), including:

- Initiative governance structures & protocols - Launching a structured, cross-departmental process to oversee initiative planning, design and implementation, including identifying key roles and responsibilities of staff, Cabinet reporting procedures
- Initiative planning template and evaluation criteria – Developing tools to ensure key questions are articulated during the initiative planning process that translate to student impact (e.g., goals, theory of action)
- Continuous improvement tools – Developing tools and processes to track collective progress across initiatives, as well as semi-annual check-in processes to facilitate reflection and continuous improvement
- Capacity building and training – Supporting training of 60+ District personnel in ongoing use of planning and continuous improvement tools, including through virtual workshops and weekly 1:1 coaching
- Planning of major initiatives – Supporting planning for major initiatives (e.g., high-quality tutoring, after school programming, and new Reset Center discipline program, Dr. Hinojosa's signature discipline-reform initiative), including defining key milestones for implementation, monitoring points / processes, and key metrics to track progress
- Procurement capability assessment – facilitating three process mapping sessions, a 360° benchmarking assessment with global procurement expert interviews, a review of over a dozen existing policies and procedures, a demo of the Oracle workflow to identify technical pain points, and interviews with 15+ customers of the procurement organization
- Procurement initiative launch – Inputs from the assessment, enabled us to identify opportunities to increase speed and quality, track impact, improve efficiency, and enhance transparency. Together with district procurement leaders, we launched 25+ initiatives focused on technology improvements, process changes and capability building

| **Impact of our work** | |

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Dallas Independent School District – Technical Assistance and Procurement

Efficient tracking and dissemination of funds across 90+ well-planned initiatives set to benefit >100K students, including:

- $75M to extended school year initiatives that increase instructional time
- $23M to high quality tutoring for >20K students behind grade level in reading and math
- $63M to cell tower pilot to provide permanent WiFi access to digitally disconnected district families
- $27.5M to Reset Centers that seek to redesign district discipline protocols and eliminate out of school suspensions

- The District's new Superintendent, Stephanie Elizalde, highlighted the **sustainability of ESSER initiative planning tools post-leadership transition**, stating, "Systems are still in place, and the whole toolkit has helped tremendously in managing our funds."
- SY '21-22 **state assessment results show reading achievement levels that exceed pre-pandemic results** for third through eighth grades, bolstered through initiatives supported by CFC TA including high-dosage tutoring and summer academies. Black students experienced some of the largest gains, as high as +17 percent.
- SY '21-22 data on Reset Centers shows a significant **reduction in repeat disciplinary action for students**, from 28% to 13%. These sentiments were echoed in a recent discussion with the Superintendent, who stated, *"[The rollout of Reset Centers] has gone extremely well. We have seen movement in suspensions, disciplinary actions, and recidivism. Data has also improved by racial breakdown. Fewer referrals are evident and as the year progresses, we expect that more kids in school should improve student achievement."*

The procurement initiatives cumulatively enabled the district to make strategic investments with ESSER and other funds more efficiently through:

- **Reduced cycle time** for launching and approving competitive bids (previously could take up to 6 months)
- **Eliminated manual processing** of bids, vendor submissions and other paper documents
- **Improved end-user experience** in working with the Procurement team (75% of district leaders currently believe this is a pain-point for their teams)
- **Improved workload and overall culture** on the Procurement team itself

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1.9　　Case 9: Washoe County School District

Washoe County School District – Strategic Planning and Capability Building	
Period of Performance	September 2022 – June 2023
Relevance	
Accelerating the implementation of this school district's strategic plan and building the capabilities of the Executive Leadership provide an example of how McKinsey has effectively supported K-12 organizations on Executive Management Mentoring/Coaching and Strategy.	
Description	
Through McKinsey support, WCSD has accelerated the rollout of an $8M principal development program for this school year, redefined the "why" for a $10M HQIM initiative and accelerated its rollout by a full school year, and introduced planning and performance management systems to strengthen the district's use of $121M in ESSER funds and the implementation of a new strategic plan. Our support was focused on utilizing the CFC Implementation Engine to improve ESSER implementation by building Executive Leadership Team (ELT) capabilities, defining clear initiative implementation plans with distinct goals, metrics and milestones, and developing progress monitoring systems across Washoe's 30+ ESSER initiatives, totaling $121M. Initiatives of focus include the rollout and adoption of new instructional materials and textbooks ($10.4M investment) and rollout of the district's Leadership Pathway Project ($8M investment), designed to provide pathways for Assistant Principal-to-Principal transitions.	
Impact of our work	

Key accomplishments include:
- Redefining the "why" behind the instructional materials adoption initiative ($10.4M with Chief Academic Officer) to include explicit ties between curricula and teaching and learning to drive instructional coherence and increase focus on student outcomes rather than solely on the rollout of materials.
- Surfacing capacity constraints regarding the $8M Leadership Pathways Projects to the Superintendent for support and introducing protocols to prioritize key competencies for principals to have Day 1, which will impact all students with new principals across the system.
- Introduction of a number of tools to provide a catalyst for standardizing 'how' WCSD leadership approaches their work, including a diagnostic of implementation gaps, planning tools, the influence model for managing change, risk anticipation protocols, discussion protocols, and an approach to cabinet-level dashboard management of top initiatives.
- *"The Leadership Team is really starting to get it - they see how the pieces fit together. The tools and processes from McKinsey allow us to shift from being reactive to thinking strategically even in the face of giant daily to-dos." – Deputy Superintendent*

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1.10   Case 10: Issaquah School District

Issaquah School District – Strategic Planning	
Period of Performance	December 2023 – May 2024
Relevance	
Aligning the district on a 3-year aspiration to increase student's job readiness and overall wellbeing showcases our experience serving K-12 organizations on strategy and student experience & enrollment topics	
Description	
Our work in Issaquah School District (ISD) aimed to help the district meaningfully advance progress in planning for a fourth comprehensive high school, while driving innovations at its existing secondary schools – all to respond to enrollment changes, increase equity, expand access and improve student experience and outcomes. We supported the superintendent and her team in understanding the different choice points around potential models for secondary school, helped them align on a 3-year aspiration for secondary innovation, and supported the launch of 3 initial initiatives to build district execution capacity and momentum toward change. At run rate, these programs could continuously impact all ISD high school students (~6400 enrollees) and influence $5M in recurring opex across CTE programming and mental health supports, as well as $650M capex for developing the new high school	
Impact of our work	

We influenced programming that aligns with and unlocks impact for major capital investment in a new high school supported by $650M in bond proceeds. Key accomplishments over the past six months include:

- District alignment around a 3-year aspiration and priorities for innovation in their secondary schools, including:
    a. Incorporating targeted elements of pedagogical innovation (e.g., micro-schools) into the currently operating secondary schools
    b. Baking significant pedagogical innovation into the new high school from day one (physical layout, staffing plan), including extensive competency-based, problem-based, and real-world learning
    c. Realigning CTE programming away from career exploration and toward job readiness
    d. Increasing supports for student wellbeing, including adopting a universal screener, ensuring there are sufficient supports for all students identified as in-need, and seeking new sources of sustainable funding (e.g., billing Medicaid) for these services
- District prioritization of a set of initiatives for actualizing this vision with 3 initiatives launching as a template for future initiatives:
    a. Scale the ongoing micro-school pilot to include all comprehensive high schools
    b. Transform the student advisory program to ensure every student has an adult they can talk to
    c. Reorganize the counseling department, including roles, to ensure ample supports to students as they transition to work or additional education after high school

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