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Chris Cerf <cdcerf@[REDACTED]>

Materials for Meeting on 3/30

2 messages

Liao, Lynn <lliao@broadcenter.org>

Tue, Mar 27, 2012 at 4:19 PM

To: Chris Cerf <cdcerf@[REDACTED]>
Cc: "Heitz, Christina" <cheitz@broadcenter.org>

Chris,

Christina Heitz and I have a meeting scheduled on Friday, March 30 at 8am in Newark with you to discuss two key issues in advance of the April TBC board meeting.

Items for review:

1. **Strategy & Goals for the Center.** One of the attached documents outlines high level strategies for the Center in 2012-2013 that reflect a significant shift away from a focus on individual leadership development and career paths to an approach that seeks to have greater impact through a stronger focus on transformational leaders, driving people to reform-ready locations, and accelerating reforms across our network.

KEY QUESTION: Are these strategies and potential metrics compelling, and consistent with the direction set at our last board meeting?

2. **Specific Changes to Superintendent-Level Work.**

a. We're recommending that we move forward with one pre-superintendent training program which builds off of the Fellowship program we piloted last year and the "best of" the former Academy. This "Academy 2.0" would focus on transformational leaders, a specific set of reform priorities, change management skills, and more emphasis on public contributions to the national reform movement.

b. In addition, we recommend bringing together an advocacy group of sitting superintendents that can really push each other and the field. By taking people already on the job, we can handpick known superstars vs. relying on our predictions of who will become superstars. This group would be a small cadre of people whose agenda is largely set by the members of the group and by whoever we ask to lead it.

KEY QUESTIONS: Do you agree with the "Academy 2.0" changes (i.e. profile of leader, program model)? What approach to the advocacy group would be highest value (e.g. standing group that can publicly take stands, ad hoc group called together to tackle specific issues)?

We're looking forward to meeting with you.

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We're looking forward to meeting with you.

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Lynn Liao

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the

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2 attachments

 **120308 TBC_Vision_Goals_Indicators DRAFT.PDF**
277K

 **120317 Board Memo.pdf**
48K

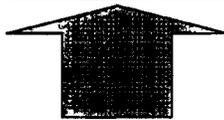


Vision

The Broad Center is working towards a future in which urban public education systems are high-performing organizations that deliver excellent student achievement results for all children. Each year, more Broad graduates join a movement of leaders dedicated to creating and transforming local, state, and national education systems to make this future a reality. These leaders share a focus on improving student achievement and closing gaps, and a willingness to challenge and disrupt the status quo. By 2020, at least five urban systems will be producing dramatically improved results for students through transformational, sustainable, and replicable reforms. These systems will create a diverse set of irrefutable examples of what is possible and will profoundly change the national education landscape as the reforms spread throughout the Broad network and beyond.

Desired Outcome

At least five urban school systems are producing dramatically improved results for students through transformational, sustainable, and replicable reforms.



Strategies

<p>WHO: Find and develop leaders and managers with the skill and will to transform education</p>	<p>Outcome: 10 transformational leaders serving as senior executives in systems of schools</p>
<p>WHERE: Drive talent to strategic locations with strong conditions for reform</p>	<p>Outcome: 10 network members, including 3+ at executive level, in the top 3 systems with the most promising reforms</p>
<p>WHAT: Accelerate reforms and high quality implementation of promising practices and priority reforms</p>	<p>Outcome: 3 breakthrough initiatives in a priority reform area led by TBC network member</p>
<p>[Redacted content]</p>	

WHO	Strategy	Find and develop leaders and managers with the skill and will to transform education
	Desired Outcome	10 transformational leaders who are currently serving as senior executives in systems of schools

Goals

1. Recruit leadership and management talent into school systems

Sample Indicators:

- # of current Residents and Fellows
- % participants that meet highest quality bar
- TBC hit rate in predicting quality and leadership impact in recruitment/selection process

2. Develop leaders with transformational skill and will

Sample Indicators:

- % of TBC superintendents whose student achievement outpaces comparison groups
- % TBC superintendents who score x on evaluation of leadership skills, organizational performance, and reform priorities
- % of Residents rated by supervisors as making exceptional contributions to the organization
- % Residents who score above x on 360-feedback evaluation tool

3. Propel and retain transformational leaders from TBC programs towards senior leadership

Sample Indicators:

- % of Academy comprised of Residency alumni
- % of Reform Advocacy Group are graduates of TBC programs
- % of graduates serving as CEOs or cabinet executives
- % of superintendents/CEOs in place for 4+ years

WHERE	Strategy	Drive talent to strategic locations with strong conditions for reform
	Desired Outcome	10 network members, including 3+ at executive level, in the top 3 systems with the most promising reforms

Goals

4. Match network members to placement opportunities that leverage and develop their leadership. (i.e. appropriate next step, best conditions for success)

A. Identify places with best conditions for reform

Sample Indicators:

- % of TBC partner organizations (i.e. new residency placements, locations where we help secure roles for alumni) designated as "reform ready"

B. Encourage network members to take roles with organizations led by transformational leaders and/or where there is high potential to accelerate reforms

Sample Indicators:

- % of transformational superintendents with one or more TBC network members on their cabinet or leadership team
- % of network members who join a top 10 priority organization (based on reform potential)

WHAT	Strategy	Accelerate reforms and high quality implementation of promising practices and priority reforms
	Desired Outcome	3 breakthrough initiatives in a priority reform area led by TBC network members

Goals

5. Drive advancements in priority reforms through training and other efforts to connect network members currently leading the work

Sample Indicators:

- % of participants who utilize training to implement priority reforms in their work
- % of training time focused on key reforms in each program
- % of the network who lead or play key role on priority reforms (i.e. educator effectiveness, innovate learning models, school choice, accountability)
- % of participants/alumni that make a “public contribution” to a reform priority (i.e. Op-Ed, white paper, public speaking engagement)

6. Connect network members to each other and to external leaders to facilitate spread of promising practices, focusing on reform priorities

Sample Indicators:

- % of network members that actively engage with TBC each year (e.g. attend a convening, participate in a working group)
- # network members that leverage online knowledge networking system each month

HOW	Strategy	
	Desired Outcome	

Goals

7. Build an enduring institution with sustainable governance systems and ongoing fiscal security

Sample Indicators:

- % board members actively engaged in supporting and accelerating TBC’s work and impact (i.e. through meeting attendance, working group participation, extending our network)
- % of board members knowledgeable about at least 3 TBC network members and their impact
- Long-term plan/endowment in place for TBC funding

8. Develop the internal systems to attract and support an exceptional organization

Sample Indicators:

- % of TBC positions filled
- % retention of high performing employees
- TBC scores above benchmark on employee engagement and onboarding surveys
- 80% of team members report that technology has improved their efficiency and decision-making quality

9. Develop and implement internal and external evaluation systems to enable data-based decision-making and accountability for results

Sample Indicators:

- *TBC board approves goals, objectives, and metrics*
- *Pilot evaluation of organizational improvement, priority reforms, and leadership skills to evaluate link between reform priorities and student achievement results*
- *Individual TBC staff performance and development plans align to organization goals*

10. Develop and execute a robust and proactive strategic communications plan to support TBC strategies

Sample Indicators:

- *% reduction in negative TBC press coverage (or other metric TBD as part of comm. plan)*
- *# of positive, national news stories on reform priorities and potential/actual impact*

Date: March 16, 2012

memorandum

To: The Broad Center Board of Directors

From: Becca Bracy Knight and Christina Heitz

Re: Future Strategy for Superintendent/CEO Recruitment,
Training, & Engagement

Background

The Center's founding mission is to improve student achievement by recruiting, training, and supporting executive leadership talent from across America to become the next generation of urban school district leaders. We have filled more superintendent positions than any other national training program, and remain the only organization recruiting management talent from outside of education. We have over 30 sitting superintendents in large urban systems, as well as state superintendents in four of the most reform-oriented states (Delaware, Rhode Island, Louisiana, and New Jersey). Broad graduates are in the number one or number two seats in the three largest districts in the country (New York City, Los Angeles, and Chicago), and lead the newest turnaround systems in Michigan and Tennessee. Most importantly, Broad graduates consistently outperform their peers in student achievement gains, in particular as their tenure increases.

It is clear to us, however, that all of this will not be enough progress to close achievement gaps in this generation, or even in the next generation. For the past year we have been exploring how we can do better.

Introduction

We have challenged our original definitions and assumptions about all aspects of our superintendent training programs, and have concluded that we need a major adjustment in strategy to increase our impact.

Areas in which we will broaden our approach:

- Reduce the **experience level** required for entering our training program. This will allow us to engage with leaders who may be more than "one step away" from the superintendency or who may not be able to make a move for several years due to personal or professional reasons. This will also enable us to seek out people with more entrepreneurial backgrounds and to influence and accelerate leaders earlier in their careers.
- **Expand placement goals** beyond large urban school districts to include CMO and state-level leadership roles. In addition, as the market evolves and different structures for managing schools emerge, we want to make sure we are preparing people to lead types of systems that may not even exist today. This will allow us to bring in talented leaders, even if they may not aspire to become superintendents of traditional, bureaucratic systems.

Areas in which we will focus our approach:

- Increase the priority we place on an individual's reform orientation, going beyond a general openness and appetite for reform to a strong and direct **alignment with specific TBC reform priorities**. We will make a major shift in our curriculum to support reform priorities and reform accelerators.
- Identify real **change agents** and conduct a sharper, more rigorous, and more realistic assessment of their likelihood of success.
- Seek **new faculty** with track records of transformational leadership, and additional faculty from outside of K-12.

- **Focus TBC communications on success stories linked to implementation of key reforms** by our graduates. To that end, we will introduce a new element to our curriculum that requires participants to make public contributions tied to their work, with a particular emphasis on our reform agenda.

Proposed Programs for 2012+

Last year, we ran two pre-superintendency training programs: the tenth cohort of The Broad Superintendents Academy and a pilot cohort of The Broad Fellowship for Education Leaders. Going forward, we propose running one *pre-superintendency* training program to prepare CEO-level leaders to assume top posts (referred to in this memo as “Academy 2.0”) and one *post-superintendency* advocacy group to convene the most talented and aggressive reformers to explore new ways to push the field. The remainder of this memo provides an overview of these two proposed programs.

Program I. Pre-Superintendency Training Program

Academy 2.0 Participant Profile

The Academy’s biggest priority is to recruit transformational leaders with the will and skill required to lead large urban school systems through dramatic reforms. We have built a sharper and more focused target profile based upon a detailed analysis of the highest performing, reform-oriented superintendents over the past decade:

- K-12 executives nominated, inspired, and/or mentored by **bold, visionary leaders with a proven history of breakthrough reforms that produced gains in student achievement** (John White nominated by Joel Klein, Robert Avossa nominated by Pete Gorman).
- **Passionate, civic-minded, and disruptive** non-traditional leaders with **significant political experience** (Joel Klein, Tom Boasberg, Chris Cerf).
- Superintendents of smaller districts with outstanding student achievement results and a **history of implementing an aggressive reform agenda** (Pete Gorman).

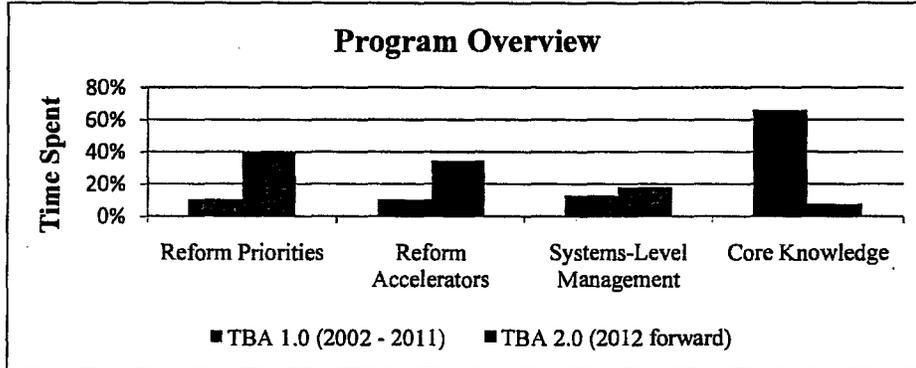
We also think the fastest growing group of promising transformational leaders will come from the following categories:

- Entrepreneurial founders and CEOs of revolutionary CMOs or non-profits (Chris Barbic, Wendy Kopp).
- Star performers from the alumni networks of successful reform programs like Teach For America and The Broad Residency (Michelle Rhee, Cami Anderson).

Through the recent Broad Fellowship pilot program, we have experience with these new types of transformational leaders such as Susan Schaeffler, founder and CEO of KIPP DC, which operates ten schools serving 3,400 students and has achieved a 97% high school graduation rate and an 85% college matriculation rate; she is a former Teach For America corps member and KIPP school leader. Many of these new types of leaders have been in the number one slot, but for smaller organizations. They report directly to a board, and are ultimately responsible for decisions around student instruction, school operations, and finance. We have seen through our pilot program that we can train leaders on systems-level management and managing work on a much larger scale. It is extraordinarily difficult, however, to teach transformational leadership traits such as courage and resiliency.

Academy 2.0 Program Overview

We propose several significant changes to the Academy’s training component that are intended to make it more focused on creating transformational change. In this model, Fellows become part of a network of trail blazers, supporting and challenging each other to maintain the drive, courage, and vision to create and implement the boldest reform agendas. The Academy 2.0 curriculum will increase time and emphasis on reform priorities, reform accelerators, and systems-level management, and move away from the core knowledge (superintendent basics such as instruction 101 and operations) that was the primary content of the first decade of the program (we have been moving towards this new model over the past two years):



1. Reform Priorities

The four reform priorities we recommend are *educator effectiveness, innovative learning models, accountability, and school choice*. These reforms were selected because we believe they have the highest potential to drive dramatic student achievement gains and they leverage recent or upcoming policy changes. Moreover, we think TBC can play a unique role in driving these reforms because it is difficult to aggregate the results from best practices (currently, not many sources exist for Fellows to learn what has been done) and because the best solutions are still unknown (so leaders could benefit from collaboration and building new ideas together).

Fellows will get up to speed quickly on the most effective versions of these reforms from around the world. To push the envelope, Fellows will create “gold standard” approaches for how reforms should be implemented assuming no barriers or political constraints. To go beyond best practices in K-12 education, we will bring in executives leading innovation and revolutionary change from other disciplines and ensure that we are setting the bar as the best in any field.

2. Reform Accelerators

Reform accelerators are strategies and skills that increase the pace and success rate of transformational change by removing obstacles, building political capital, and enhancing leadership credibility.

Common Strands: We will address three reform accelerators that are cross-cutting strategies essential for implementing dramatic change—change management, political navigation/stakeholder management, and communication.

Public Contribution: Our vision for the Academy’s graduates is to serve not only as leaders of systems, but also as leaders of the national discussion on education reform. Each Fellow will make a public contribution by developing an innovative product or idea, publishing an article or other work, or engaging in regional or national speaking opportunities.

Customized Leadership Skill Building: We also plan to help Fellows develop the individual leadership skills needed to drive and implement reforms effectively. These skills will vary by person. We will leverage individual support, executive coaching, mentoring, consultancies, and peer advisory teams to improve personal leadership effectiveness.

3. Systems-Level Management

We know that some people entering the program will have limited experience in large, complex systems-level management. Providing strategic frameworks, such as theory of action, will help Fellows think about how to guide and prioritize their work and decisions. Applied learning projects will be used to simulate some of the most important strategic decisions superintendents have made over the past five years.

4. Core Knowledge

Prior to engaging in training, Fellows will complete an in-depth survey that assesses their leadership skills and level of expertise in core knowledge areas, such as instruction 101 and operations. Using the results, we will provide customized field projects, readings, research summaries, and toolkits to help Fellows gain knowledge in areas that are lacking.

Academy 2.0 Program Structure

The program structure is planned for 18 months. Fellows will meet face-to-face for 4-5 sessions with approximately 3.5 days per session. Between sessions, Fellows will invest 10-12 hours per month participating in customized learning opportunities.

Program II. Post-Superintendency Advocacy Group

The following section outlines a proposed approach for working with the highest performing education leaders once on the job as superintendents or CEOs. We are earlier in our thinking on this program, but have included a high level overview since it is an important and strategic complement to the Academy 2.0 program.

Proposed Structure for Highest Performing CEOs

To further TBC's impact, we plan to identify and convene a select group of bold reform leaders, the most promising Academy graduates, and other education leaders, who are poised to advance the highest-leverage education reform policies on the national landscape.

Similar to the gathering of education reformers Joel Klein once convened in a pizza parlor, this group will be a select, invitation-only group that will collaborate to address some of the most pressing challenges facing the education sector, help shape policy agendas, influence public opinion, coalesce political forces, and advance bold reforms on the ground. TBC will convene this action-oriented group twice yearly in Washington, D.C., and empower them to drive the discussion, make the space productive, and accelerate the pace of reform.

This new program will deliver against the following:

- It will create a powerful group of the most transformational and proven leaders.
- It will become the go-to group for reform leaders to engage and move the most cutting edge work forward.
- It will help create a more supportive environment and change the national landscape to make it easier for superintendents to define policy agendas, influence public opinion, coalesce political forces, and advance bold reforms on the ground.
- The participants' personal reform agendas and peer pressure from their colleagues will solidify their commitment to do whatever it takes to drive their systems and the education reform movement forward.

Conclusion

While the programs and structure we plan to implement moving forward would be radically different from what we did in 2011, we anticipate the budget will be cost neutral to what has been approved for 2012-2013.

	2011	2012/2013+
Pre-superintendency training programs	The Broad Fellowship for Education Leaders (12 – 25 Fellows)	The Broad Leadership Academy (15 – 25 Fellows)
	The Broad Superintendents Academy (6 – 10 Fellows)	
Post-superintendency advocacy group		Reform Advocacy Group (5 – 10 Members)

We believe the proposed changes to the Academy recruiting, training, and engagement strategy will take this program to the next level—delivering greater impact for the same budget—by attracting the most transformational leaders, accelerating the pace of breakthrough reforms, and amplifying the impact of breakthrough reforms.