Cross-Departmental Teaming for Strategy Execution

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Cross-departmental Teaming for Strategy Execution

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
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To the Harvard Graduate School of Education
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Abstract

This capstone examines how a newly formed senior-level team worked together to complete a complex task, while driving towards a larger goal of becoming a learning organization. For the 2014-2015 academic year, central office leaders in the San Francisco Unified School District (SFUSD) worked to develop a new approach to the execution of their strategic plan, “Impact Learning. Impact Lives.” In a continued attempt to decrease SFUSD’s persistent achievement gap and to increase academic performance of all students, district leaders renewed their commitment to deeper levels of implementation for the strategic plan. During a series of senior-level team meetings in the spring of 2014, central office leaders realized that a number of district departments were inadvertently working at cross-purposes or duplicating efforts. Likely reinforced, in part, by previous and current SFUSD organizational systems and structures, district departments had become accustomed to working in silos, which, in turn, required limited system-level interdependence. Given the SFUSD senior leadership’s desire to shift their organizational culture to one of learning together, this capstone explores the district’s transition from silo driven work to cross-departmental teaming.

The research section of this capstone outlines the principles of effective strategy execution and teaming. The analysis section describes the impact of the district’s organizational culture on the application of these principles. The implications section identifies important components - communication plans, cycles of inquiry, teacher and leader voice that are needed to ensure effective strategy execution in large, urban school systems. This capstone concludes with an acknowledgement of the challenges associated with organizational change and calls for continuous reexamination of strategy execution guided by research and reflection.
Introduction

Founded in 1851, the San Francisco Unified School District (SFUSD) has a deep history of strong student achievement. The seventh largest urban school district in California, SFUSD routinely ranks among the top performers and often takes 1st place as the highest achieving on state assessments. The district’s mission is, “to provide each student with an equal opportunity to succeed by promoting intellectual growth, creativity, self-discipline, cultural and linguistic sensitivity, democratic responsibility, economic competence, and physical and mental health so that each student can achieve his or her maximum potential” (Vision 2025, 2014). Honoring this mission, SFUSD boasts a rigorously funded Public Education Enrichment Fund to support extensive programming for visual and performing arts, sports, libraries, wellness centers, and more. The district has one of the most extensive complements of English Learner and Multilingual Pathways, offering nine different options. A wealth of public and private partnerships further cultivates the realization of this mission. Presently, in a joint partnership with the technology industry and the City of San Francisco, an effort is underway to provide middle school students with “next-generation media and technology capabilities, ensuring that students do not just understand, but can also contribute to and thrive in the digital world” (Salesforce, 2014).

Priding itself in this social justice mission, one of the district's core beliefs is, “The achievement gap is the greatest civil rights issue facing SFUSD.” In conjunction, another core belief is, “It is possible to increase academic achievement of high performing students and accelerate achievement of those currently less academically successful” (Vision 2025, 2014). Despite this, SFUSD continues to manage a widely acknowledged perennial achievement gap. In the not-too-distant future, this achievement gap may be further
exacerbated by another growing gap. The City of San Francisco is presently experiencing a significant wealth gap. In recent years, the gap between the richest and poorest San Franciscans is growing faster than that of any other of the nation’s largest cities (Berube, 2014). Add to that another complication, “The sharp influx of wealth, combined with limited housing, has created an affordability crisis that threatens to undermine the values and spirit that have long defined San Francisco” (Vision 2025, 2014, p.11). This confluence of multiple inequalities may cast another shadow over the challenging work the district has undertaken to close the achievement gap. It will likely require high levels of coordination between the city and the district to ensure today’s students are tomorrow’s graduates and future citizens of San Francisco.

As the superintendent strategically identified when he took the helm of SFUSD in 2012, “I think what I’ve also found is that many folks don’t understand what it’s going to take to close the achievement gap. It means that we have to change some of the ways we do business.” He went on to declare, “It’s not about preaching to parents or preaching to kids. It’s about providing the systems and structures to meet kids where they are and get them to where they want to be” (Hellerstein, 2012). The answer, in part, was SFUSD’s 2013-2015 strategic plan1 entitled “Impact Learning. Impact Lives.” What set this strategic plan apart from previous ones, was its attempt to get more granular in its description for what the district’s high leverage practices for increased student learning looked like in the central office, in schools, and in classrooms. The belief was that this more targeted

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1 Summer 2015, SFUSD is scheduled to publish the strategic plan for 2015-2017. The intent is for this iteration of the strategic plan to remain very similar to the current, 2013-2015 plan.
approach to district-wide strategies for teaching and learning would help close the achievement gap.

Regretfully, the district has not moved the needle on the gap. There is nearly a 50% gap between White and African American students on both English Language Arts and Mathematics state assessments. A self-described “unabashed cheerleader for social justice,” the Superintendent passionately cautioned in 2012, “If we systemically allow kids to underperform, then we’re aiding and abetting an institutionalized racist system that is keeping kids disenfranchised.” In a continued attempt to decrease this underperformance, to increase performance for all, and believing in the strategies outlined in “Impact Learning. Impact Lives.” a deeper effort to ensure it was more fully executed was undertaken in fall 2014. My strategic project for this capstone was to coordinate a newly formed team of senior level leaders to design an execution plan for “Impact Learning. Impact Lives.”

**Framing of Strategic Project**

SFUSD central office staff embarked on a new approach to their work during the 2014-2015 academic year. This approach was twofold – it focused on the way the central office employees collaborated to do their work and on a renewed emphasis on how the district implements its strategic plan, both of which sat under the district’s larger goal of continuing to drive towards becoming a learning organization.

In spring 2014, during a series of Superintendent’s Cabinet meetings, department leaders for School Supervision, Curriculum & Instruction, Special Education, and Student, Family & Community Support discovered they were inadvertently working at cross-purposes and duplicating efforts. A specific example of this potentially problematic approach to the work emerged during a discussion on summer professional development. The district-level
Chiefs and Assistant Superintendents realized that their proposed summer professional development plans prioritized different approaches to implementing the district’s core curriculum and, if delivered as written, they would send mixed messages to their participants in the various departments across the district.

This realization flagged a larger, persistent problem. Likely reinforced, in part, by previous and current SFUSD organizational structures and budget allocations, district departments had become accustomed to working in silos, which, in turn, required little system-level interdependence to achieve department-level goals and outcomes. Thus, the District’s Deputy Superintendent of Instruction, Innovation, and Social Justice and his senior level team confirmed their commitment to try to work together differently in a newly created leadership structure – The Impact Learning Advisory Group.

The first task of this newly formed Impact Learning Advisory Group was to engage in the development of an implementation plan for the district’s strategic plan, “Impact Learning. Impact Lives.” Though this strategic plan was published in the fall of 2013, it was not fully embraced throughout the district. Regretfully, the window for district-wide adoption was never fully opened. Instead, another district effort took precedence. A novel and needed effort, the district took on the process of imagining what SFUSD schools should look like for today’s Kindergartners who will graduate in 2025. This process resulted in a north star document, known as “Vision 2025.” Though vital, it hampered the implementation work for “Impact Learning. Impact Lives.” “Vision 2025” captured the attention of leaders in central office. The time and commitment needed to properly launch “Impact Learning. Impact Lives.” was not prioritized. Therefore, it did not initially get its due.
In response to this pressing need for execution, the strategic plan received a second opportunity to be introduced, but this time, with an accompanying implementation plan, all in the hopes of increasing fidelity to the *Six Strategies for Success* – a roadmap for raising student achievement - outlined in “Impact Learning. Impact Lives.” And so, the Impact Learning Initiative was launched. The Impact Learning Advisory Group was comprised of the Deputy Superintendent, five Chiefs, three Assistant Superintendents, an Executive Director, and me. This included representation from the following departments: Instruction, Innovation, & Social Justice, Special Education, Human Resources, Early Childhood, Curriculum & Instruction, Student, Family & Community Support, High Schools, Elementary Schools, and the Superintendent’s Zone Schools (Appendix A). Of note, the Chief of Human Resources and Chief of Early Childhood reported directly to the Superintendent, the reminder of the Advisory Group members reported to the Deputy Superintendent.

Outlined by the Deputy Superintendent and his Executive Director, the Advisory Group was expected to:

- Develop a deeper understanding of collective work towards shared goals and gain greater clarity of leadership roles.
- Provide leadership for the implementation of SFUSD’s strategic plan “Impact Learning. Impact Lives.”
- Actively participate in Advisory Group meetings to progress monitor and champion our collective work and ensure completion of deliverables.

The Deputy Superintendent and his Executive Director decided that the structure for doing this work would take the shape of smaller working groups organized around the *Six Strategies for Success* outlined in the strategic plan (below & Appendix B). The charge for these six working groups, the Impact Learning Implementation Teams (each ranging from 7-10 cross-departmental members), was to develop a work template that would elucidate the
ways in which their team’s “Strategy for Success” would be implemented and supported district-wide - in classrooms, schools, and central office.

**Six Strategies for Success**

- **Strategy 1:** Implement the SFUSD Core Curriculum and use student data to make informed decisions and monitor our progress toward goals.
- **Strategy 2:** Provide tiered levels of academic and behavior support to all students using a Response to Instruction and Intervention (RTI) model.²
- **Strategy 3:** Build a clear vision, culture and conditions for college and career readiness at all school levels.
- **Strategy 4:** Differentiate central office supports to schools through a Multi-Tiered System of Supports (MTSS).
- **Strategy 5:** Recruit, develop and retain highly qualified teachers, leaders and staff.
- **Strategy 6:** Increase awareness and build the supports necessary to fully implement SFUSD’s Family Engagement Standards.

**Figure 1. Impact Learning Initiative Teaming Structure.**

² Renamed, fall 2014, as “Safe and Supportive Schools.”
The cross-departmental Advisory Group and Implementation Team structures are illustrated above. The Implementation Team members (one for each of the *Six Strategies for Success*) were selected by the Advisory Group and were comprised of executive directors, directors, instructional coaches, and teachers on special assignment. Each Implementation Team had four team leads (two of which also sat on the Advisory Group), representing the following perspectives: school supervision, content expertise, equity, and policy & operations. The four team leads served as intermediaries between the Advisory Group and the Implementation Teams. As project manager for this initiative, I served on the Advisory Group and each of the Implementation Teams.

**Review of Knowledge for Action**

As described previously, one of SFUSD’s primary aims for the Impact Learning Initiative was to ensure their current strategic plan, “Impact Learning. Impact Lives.” is operationalized with greater fidelity at all levels in the district - in classrooms, in schools, and in central office. In order to accomplish this, the Deputy Superintendent charged the Impact Learning Advisory Group with developing implementation plans for each of the district’s *Six Strategies for Success*. For the first part of this review, I will turn to the literature to answer the following questions:

- What are the challenges associated with strategy execution?
- What components and processes are needed to design an implementation plan for strategy execution?

**Strategy Implementation**

As is well known in the field of public education, it can be challenging to *write* a system-level strategic plan. However, it can be that much harder to *implement* a strategic plan. Charles Payne (2010), public education scholar and author of *So Much Reform, So*
Little Change: The Persistence of Failure in Urban Schools outlines why execution is such a challenge. In Payne’s words, we have “a history in which programs have been oversold and under-thought-out, adopted with exaggerated hopes, expanded at unrealistic rates, and then jettisoned for reasons as specious as the ones for which they were adopted” (2010, p. 168). Payne goes on to list more than a dozen common impediments to program implementation. These include the tendency to: “discount the social, political environment, try to do too much too quickly, for everything to fall on the principal and the faithful few, and for teachers to comply in a minimal way” (2010, p. 172).

Despite his litany of criticisms, Payne empathizes with the field and acknowledges, “the causal chain of events leading to strong implementation and outcomes has proven far more complex than originally considered” (2010, p. 160). It is no surprise that many public education initiatives rarely realize their full potential. It seems that (while almost an old adage at this point) – our systems are perfectly designed to produce the results they’re getting. Payne concludes that strategy implementation may be less of a “what we implement” problem, and, instead, more of a “how we implement” problem.

Rachel Curtis and Liz City, authors of Strategy in Action, agree and caution that, “Execution is the place where the plan goes off the rails” (2009, p. 144). In order to execute well and solve for the ‘how we implement’ problem, Strategy in Action offers a detailed approach for developing strategy implementation plans, with teams, and for use in public school systems - precisely the process SFUSD is attempting to engage in. For effective strategy execution, Curtis and City suggest that focused and sustained attention must be given to four key areas: (1) resource allocation (2) systems and structures (3) changes in behavior and (4) conducting dynamic work (2009, p.145).
“Strategy without resource alignment is simply words on a page with no hopes of implementation” (Curtis & City, 2009, p. 145). Honig and Hatch (2004), authors of “Crafting coherence: How schools strategically manage multiple, external demands,” further emphasize that aligning resources is a critical role for district central offices in supporting schools. Systems and structures include the “technical, managerial disciplines of project planning, managing work flow, and tracking metrics” (Curtis & City, 2009, p. 145). The third key area of execution, “changes in behavior,” sits at the heart of SFUSD’s effort. Curtis and City stress the importance of the cross-departmental teaming processes, calling it the “lifeblood of high-performing organizations” (2009, p. 145). The last consideration for effective execution is the recognition that the work is dynamic. “The strategy written on the page must evolve as it grows into life, responding to the environment, changing conditions, and the learning that occurs along the way” (2009, p. 145). This is also inline with the ideology shift needed for implementation identified by Payne. “You (should) implement a model with the expectation that you will learn from the attempt, not with the expectation that it will ‘work’” (2010, p. 182). Taken together, these four focus areas for strategy execution could require a district to undergo a good deal of change. Curtis and City point out that, “While we talk a lot about school systems as driven by compliance, it’s worth noting that the people working within them are not actually all that compliant” – especially during a change effort (2009, p. 145). This serves as a reminder for how difficult it can be to put “strategy in action.”

Akin to this “Strategy in Action” approach is Michael Barber’s Deliverology method – “a systematic process for driving progress and delivering results” (Barber, Kihn, & Moffit, 2011, p. vii). This method outlines three components for strategic plan implementation and the oft forgotten tools for monitoring the levels of implementation. The Deliverology
approach takes us through the components of the delivery unit, data collection, and routines for performance. The delivery unit is a small group dedicated to ensuring the strategic priorities are fully adopted and practiced. Data collection involves setting targets, those that are measurable yet also push boundaries. Performance routines take the form of meetings and reports to keep the effort at the fore of the organization’s spoken aspirations (Barber et al., 2011). This “from idea to implementation” model has been successfully used in public school districts such as Maryland’s Montgomery County Public Schools and San Jose Unified School District.

Though Barber and colleagues remind us how insurmountable it can be to execute on strategy, they stress that “none of the techniques described here will work to greatest effect without senior leaders first thinking through the way relationships are built” (Barber et al., 2011, p. 33).

In addition to having the capacity to do the work, system actors need to understand the why of your delivery effort: Why is change important? What is its moral purpose? They must also understand your system’s strategy, how it will be carried out, and, crucially, what it means for them (Moffit & Kim, 2011, p. 189).

Throughout the strategy implementation literature, time surfaced as a common impediment. Concerns center on the need for allotting ample time for effective strategy implementation. Curtis and City warn of the “tyranny of the urgent.” In a similar vein, Payne claims:

Perhaps the safest generalization one can make about urban schools or school districts is that most of them are trying to do too much too fast, initiating programs on the basis of what’s needed rather than on the basis of what they are capable of (2010, p. 173).

Instead, we need to take more time to do reform differently – “time for professional development, time for key relationships to develop, time to change teacher beliefs, time for midcourse assessment” (2010, p. 172). And so, we’re reminded that staying the course may
be the only way to yield the change we wish to see. “Programs can show measurable results in two to three years, but the strongest results are likely to show up in the third through seventh year or beyond” (Payne, 2010, p. 168).

**Teaming**

“*Strategy doesn’t just happen. People working in teams make it happen.*”

(Curtis & City, 2009, p. 38)

Given the SFUSD senior leadership’s desire to shift their organizational culture to one of learning together, in cross-departmental teams; special attention is warranted in the area of effective teaming practices. In this section, I will look to the research to answer:

- What are the tenets and practices for conducting work in high-functioning, cross-departmental teams?

The literature tells us teams are essential in our current knowledge economy. Our problems are of a complex nature; and complex systems necessitate team learning. According to Peter Senge, in his 1990 publication of *The Fifth Discipline*, “almost all important decisions are now made in teams” (p. 219). Teaming is one of the key drivers of present day organizational improvement. Amy Edmonson, a Harvard Business School (HBS) expert on teams, argues that, “teaming is *the* (emphasis added) engine of organizational learning” (2012, p. 14). Silo-driven work environments seem more likely to result in stilted organizational advancement (Edmonson, 2012). These convincing claims on the power of teams offer a compelling justification for SFUSD senior leadership’s strong desire to conduct their work in cross-departmental teams.

There is a vast body of scholarship on the definitions of a team. Senge defines team learning as “the process of aligning and developing the capacity of a team to create the results its members truly desire” (1990, p. 218). According to Patrick Lencioni, author of
“The Five Dysfunctions of a Team,” a team is a team if, “it accomplishes the results it sets out to achieve” (2005, p. 7). Richard Hackman, author of “Leading Teams” defines “real teams” as ones in which clarity exists around the task, boundaries, the role of authority, and expectations for stability (2002). In their article “The Discipline of Teams” Katzenbach and Smith write that a team is “a small number of people with complementary skills who are committed to a common purpose, set of performance goals, and approach for which they hold themselves mutually accountable” (2005, p. 1). These are numerous, yet relatively similar, definitions for what constitutes a team. Across these definitions of “team” is the need to engage the team itself to determine why a team structure is the right approach for the work, why they are on the team, and what the team aims to accomplish.

There are also many converging schools of thought about the components and behaviors of highly effective teams. Curtis and City identify five building blocks necessary for high-functioning leadership teams (2009, p. 60).

*Table 1. Five Building Blocks of Effective Team Functioning*

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<th>Building Blocks</th>
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| 1. Purpose and clarity | • The purpose of the team is clear.  
• Members of the team understand their role on the team.  
• The team’s decision-making authority is clear.  
• The work of the team is challenging.  
• The team’s decisions are consequential. |
| 2. The right people | • Key decision makers are on the team.  
• The team includes people who are systemic thinkers and team players.  
• The team includes people knowledgeable about teaching and learning.  
• The superintendent periodically assesses the strengths and weaknesses of the team and makes adjustments when they are needed. |
| 3. Structures                                                                 | • The team has clear norms for behavior and adheres to them.  
|                                                                             | • There is a clear agenda for every meeting, and the team follows  
|                                                                             |   the agenda.                                                      
|                                                                             | • The agenda allots an appropriate amount of time for each item  
|                                                                             |   and sets goals.                                                  
|                                                                             | • The superintendent sets the agenda or designates the person     
|                                                                             |   who does.                                                       |
| 4. Capacity                                                                 | • The team devotes time towards building trust.                   
|                                                                             | • Team members demonstrate trust in one another.                   
|                                                                             | • Team members feel free to express vulnerability.                 
|                                                                             | • Team members display comfort with conflict.                      |
| 5. Accountability                                                           | • The team regularly assesses its performance.                    
|                                                                             | • The team conducts occasional in-depth reviews of its work and    
|                                                                             |   processes.                                                      |

In referring to these five building blocks, Curtis and City warn, “The importance of group process and how to set up teams to be high-functioning and effective is not prioritized, and the related skills are seldom taught” (2009, p. 145).

The willingness to be vulnerable - to be reflective “out-loud” in the presence of fellow team members - continued to surface throughout the research. Vicki Phillips, former public school superintendent, in reflecting on the critical teaming behaviors in her leadership meetings, emphasized the importance of “create(ing) a climate of intellectual engagement, where questioning, dialogue, and respectful debate became the norm in all meetings” (as quoted in Wagner, Kegan, & Lahey, 2006, p. 69). In a more recent analysis on the behaviors of high-functioning teams, Edmonson shares that teaming is less about structure, and is more about mindset and team practices. Speaking up, asking questions, and sharing ideas are the behaviors required of effective teams (2012).
Katzenbach and Smith, authors of “The Discipline of Teams,” introduce the element of performance as integral to the behaviors of teams. They write, “…teams and good performance are inseparable: You cannot have one without the other” (2005, p. 2). Performance includes both individual and team-based work. It is measured by accountability for producing “collective work products.” “Teams produce discrete work products through the joint contributions of their members.” A team that is focused on performance has the potential to be “more than the sum of its parts” (2005, p. 4).

With decades of study on teams, Katzenbach and Smith outline a list of eight behaviors (to include the element of performance) common to effective teams (2005, p. 5):

1. Establish urgency, demanding performance standards, and direction.
2. Select members for skill and skill potential, not personality.
3. Pay particular attention to first meetings and actions. Initial impressions always mean a great deal.
4. Set some clear rules of behavior.
5. Set and seize upon a few immediate performance-oriented tasks and goals.
6. Challenge the group regularly with fresh facts and information.
7. Spend lots of time together.
8. Exploit the power of positive feedback, recognition, and reward.

Mentioned by Curtis and City as part of their building blocks, Katzenbach and Smith also highlight the importance of commitment, trust, and accountability. However, Katzenbach and Smith suggest there is a causal relationship. Commitment and trust must be present before team accountability can be achieved.

Given the composition of the Impact Learning Advisory Group, it’s also worth noting what the literature says about the importance of and behaviors unique to senior level leadership teams. Michael Tushman, a Harvard Business School professor specializing in leadership development, identifies the importance of senior leadership teams in leading change. He stresses that senior teams “are the most powerful signal generators in any organization; they extend and institutionalize the leadership and management of innovation.
and change (2002, p. 186). He goes on to caution that in building these teams, “a major
problem in executing change is that the members of the senior team frequently are the
products of the very systems, structures, and values that need to be changed” (2002, p. 187).

In concert, Curtis and City make a powerful, yet potentially alarming, claim about
what the behaviors of a senior leadership team signal about an organization.

In our experience, after observing a single senior leadership team meeting, we can
predict, quite accurately, four things about the system as a whole: 1) how people
throughout the system treat and interact with one another; 2) the level of focus and
discipline brought to the work of instructional improvement; 3) the extent and
quality of collaboration within the organization; and 4) the team’s impact on the
work of the system (2009, p. 39).

The literature acknowledges how exceedingly difficult this work can be. Senge warns
of “the myth of the management team.” He goes so far as to describe the inability of
management teams to admit what they don’t know in order to solve problems as a “learning
disability.” Chris Argyris, a contemporary of Senge, describes this as “skilled incompetence
– teams full of people who are incredibly proficient at keeping themselves from learning” (as
cited in Senge, 1990, p. 25). In the school systems context, Curtis and City warn that, “Too
often, team functioning is viewed as peripheral to improving instructional quality and
learning for all students – something to be pursued, or not, depending on the organization’s
tolerance for such things” (2009, p. 38). The work of teams may appear overwhelming,
especially when the culture of an organization is taken into account.

Organizational Culture

Curtis and City recognize that executing strategy can require a shift in culture. They
write, “Culture is amorphous, invisible, and pervasive. No wonder why the prospect of
attempting to change it feels futile” (2009, p. 147). Culture and change may be
inseparable. A change in culture may be necessary for effective strategy execution. Peter
Drucker, leader in management literature, famously forewarned, “Culture eats strategy for breakfast.” It is that powerful.

More hopeful than Drucker, the authors of “How to Manage Urban School Districts” argue that while “leaders of urban school districts often view culture as something amorphous that defies management,” in fact, “leaders can upend an entrenched counterproductive culture” (Childress et al, 2006, p. 11). They go on to offer case study examples of how particular actions like, “redefining roles or relationships, altering job performance expectations, and using job assignments in creative ways,” can and do shift culture. They even offer a compelling example from SFUSD. Under Arlene Ackerman’s superintendency in the early 2000s, a successful decentralized school system coupled with accountability was instituted (2006). Evidenced by improved performance for minority students, this countercultural move was declared a success.

A Harvard Business School note on “Analyzing Work Groups” captures the power culture has when generating work through teaming structures. This HBS framework “helps provide insight into the factors most profoundly shaping the development, dynamics, and effectiveness of task-performing groups and, in particular, group culture, its antecedents, and consequences” (Hill, 1995, p. 1).

Figure 2. Analyzing Work Groups Framework.

As illustrated above, the Framework for Analyzing Work Groups is organized along four dimensions – context, design factors, group culture, and effectiveness outcomes. This HBS
note, however, cautions that culture seeps into all four dimensions and deserves consideration for any task-performing team. As explained in the model,

    Group culture arises from the interaction of the three design factors – the group’s composition, its task, and the formal organization within which the group is located. The design factors and how they interact are in turn shaped by a set of contextual factors. Group culture has a direct impact on team effectiveness (Hill, 1995, p. 16).

The designers of this model also acknowledge that, “Theoretically, arrows could be drawn between all elements of the model; however, we are concentrating only on the most important patterns of interaction, and arrows, therefore, describe the key relationships” (Hill, 1995, p. 15).

There are many factors for consideration in this framework. Given my position as a doctoral resident, there were limitations on which aspects I could influence. As suspected, the design factor elements were more in my locus of control. In the analysis section of this capstone, I will rely on this Framework for Analyzing Work Groups as my primary tool for interpreting how and why the events of my strategic project unfolded.

    Given these bodies of knowledge on strategy implementation and the effective practices of teaming, the theory of action for my strategic project was:

If I:

    • Incorporate the tenets and practices, as described in the RKA, for building and leading cross-departmental teams for the purpose of developing the strategy implementation plans.

    • Create an effective process for collecting and developing the content for an implementation plan that is inclusive of cross-departmental perspectives.

Then I, in coordination with the Impact Learning Initiative Advisory Group, would be able to produce:
• A clear, concise, and coherent strategy implementation plan, coupled with defined resources, measures, and outcomes (to be published in the “Impact Learning. Impact Lives.” 2015-2017 Strategic Plan) that will be more likely to have:
  o Stakeholder buy-in from members of the central office and department staff.
  o Strategic alignment of resources to support implementation.
  o Explicitly aligned professional development plans.

And then, SFUSD central office staff will be better positioned to:

• Build on the stakeholder buy-in that was initiated during the design phase of the implementation plan to increase school-based adoption of the Six Strategies for Success.

• Design process outcomes to measure the levels of implementation of school-based leaders and teachers.

• Monitor student outcomes to determine the impact and effectiveness of the strategic plan.

**Strategic Project**

**Description**

In mid-August, the Deputy Superintendent called the first Impact Learning Initiative Advisory Group meeting. He began by reemphasizing the team’s desire, as expressed in spring 2014, to work together in a new collaborative, cross-departmental structure. He then informed the Advisory Group that their initial task would be to develop an implementation plan for “Impact Learning. Impact Lives.” and that the Implementation Teams would launch in early September - three weeks away. Members of the Advisory Group, in turn, suggested that given their history of silo-driven work, they needed an opportunity to learn about each other’s work before they launched and led the Implementation Teams.
Also in this first meeting, the Deputy Superintendent announced that I, as the doctoral resident, would be the project manager for the Impact Learning Initiative. Though planned differently, in this meeting I presented the particulars of the Advisory Group’s initial task – the timeline, the newly created Implementation Team role, and the deliverables, all of which were questioned by the Advisory Group. I was concerned about how the Advisory Group members may have experienced my role in this first meeting. During the debrief of this Advisory Group meeting, the Deputy Superintendent and his Executive Director reassured me that I was still well positioned to lead this initiative.

Following up on the Advisory Group’s request to learn more about each other’s bodies of work, I scheduled and prepared the agendas for a series of “Learn-Ins” in which team members presented their current projects. To help ensure all members of the Advisory Group were knowledgeable about each other’s key work priorities, the intersection with the six strategies, and the connection across work streams, I designed a note-taking tool to capture each of these aspects, which I then used to produce a summary of the Learn-Ins. Specific questions for reflection included:

- Where does our work overlap and how are we mutually reinforcing each other’s work?
- Where are we working in parallel and where might we be inadvertently working in opposition?
- What building blocks can we collaborate on to elevate our respective work?

As the Advisory Group members presented, common themes that surfaced were: (1) a new awareness about existing work efforts and (2) the numerous points where work was duplicative across departments. These themes continued to surface throughout the Impact Learning Initiative, serving as a reminder to avoid the mistakes of the past and to stress the importance of getting on the same page and getting coherent.
As these “Learn-Ins” concluded, the Advisory Group decided that they were not ready to launch all six Implementation Teams, as originally planned. They were not yet clear on how the work plans should be designed. So instead, they decided that the initiative should start with a pilot Implementation Team. In early October, the Strategy 2 Implementation Team started as a group to learn from with an eye towards launching additional groups shortly thereafter. The Strategy 1 and Strategy 5 Implementation teams launched in November. Strategy 1 launched because its content was further along relative to the other strategies. Due to a district urgency to build out a new human capital system, Strategy 5 launched. On page 30 in this section, I will address how the process for these three teams unfolded\(^3\). But first, I will explain how the work of the Advisory Group continued to develop and highlight the themes that emerged.

From September onward, the Advisory Group met monthly. I set the agendas and facilitated these meetings. Our discussions focused on decisions about the: Implementation Teams’ member composition, format for the implementation plan templates, and progress on the work plan for the initiative. Meetings included updates on the Implementation Teams’ development and progress.

**Advisory Group: Overarching Themes**

Based on the research in my Review of Knowledge for Action (RKA) on Curtis and City’s “building blocks for high-functioning teams,” I will now discuss how these building blocks emerged as overarching themes in the work of the Advisory Group.

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\(^3\) Due to the decision to begin with a pilot Strategy Implementation Team and the extended timeline for producing the pilot Implementation Plans, Strategies 3, 4, & 6 did not get included in this initiative.
The Big Picture

On multiple occasions, Advisory Group members raised concerns about how and where “Impact Learning, Impact Lives.” fits in the big picture for SFUSD. It appeared that Advisory Group members were seeking reassurance that their efforts with the Impact Learning Initiative would align to the district’s other priorities. They were seeking coherence. Questions and requests for clarification surfaced on how the School Quality Improvement Index, Vision 2025, Local Control and Accountability Plan, Local Educational Agency Plan, Multi-Tier System of Supports, and Balanced Score Card, to name a few, were in a coherent conversation with each other and how these key documents would inform the Advisory Group’s work. When I reached out to additional members of the central office staff for more clarification, it seemed that there were still multiple interpretations on how the district had mapped the alignment of these documents and priorities. The Executive Director of Federal and State Programs offered the clearest explanation. She pointed to three key documents and colloquially referred to them as the Compass (Vision 2025), the Map (Impact Learning, Impact Lives), and the Barometer (School Quality Improvement Index) (Appendix C). From this, I engaged in the exercise of mapping the six strategies to the School Quality Improvement Index.

The Buy-In & The Ask

At one of our first Advisory Group meetings, I invited the Superintendent to join our meeting and speak to his support for the Impact Learning Initiative. The talking points I provided him centered on the following: (1) collaborative teaming and breaking down silos (2) honoring your time and dedication to this work and (3) moving forward and expanding the work to district teams (Appendix D). While he reinforced these themes, he also indicated that this work could lead to a reconfiguration of the SFUSD central office.
organizational chart. This indication may have had an unintended consequence of dampening enthusiasm for this initiative, especially if the Advisory Group members connected this effort to a potential refocus and realignment of their current bodies of work.

I, along with the Deputy Superintendent, and his Executive Director, developed an Advisory Group Charter that was shared at the September Advisory Group meeting. The Advisory Group Charter outlined the goals, deliverables, role expectations, and work plan (Appendix E). In the October and November Advisory Group meetings, I revisited the Advisory Group Charter to ensure understanding was still present and to remind the members of their responsibilities for the task at hand. Despite my efforts, I continued to sense some hesitancy from members of the Advisory Group to serve as active leaders on the Implementation Teams. In two cases, members requested to assign a designee. In another case, a member needed additional encouragement from the Deputy Superintendent to ensure his full participation. Another member offered to join as a team lead only after the Deputy Superintendent, once again, reminded the members that they were expected to hold leadership roles on the Implementation Teams. Furthermore, I did not engage the Deputy Superintendent and the Advisory Group to determine how participation in this initiative would be explicitly linked to Advisory Group members’ performance goals, incentives, or recognition.

Given this reticence, I began to meet 1-on-1 with the Advisory Group members to gauge their assessment of the work and their recommendations for moving forward. While their recommendations were solution-oriented, they were again reluctant to initiate next steps and lead the work, despite the language that appeared in the Advisory Group Charter that read, “Set the agendas, lead, and facilitate Impact Learning Implementation Team work
sessions.” I'll explore potential reasons for this in the analysis section; here I suggest they are correlated with the lack of buy-in.

There was also language in the Advisory Group Charter that referred to effectiveness monitoring:

- “Advise and offer recommendations to sponsoring Deputy Superintendent, especially in issues related to organizational capacity-building, strategic resource management, programmatic changes, or rationale for structural changes.”

As the district moves toward clarity on such system-level changes, a likely next step will be to create and institute effectiveness measures. These accountability tools could have significant consequences for senior leadership performance expectations, which may also be causing the Advisory Group some angst about fully engaging in the work. In the voice of W. Edwards Deming, "You can't manage what you can't measure."

**Vulnerability & Trust**

From my previous professional experiences in working with newly formed, cross-departmental teams, and given Curtis and City’s insistence that team functioning is a prerequisite for a school system’s effectiveness, I thought it necessary to plan explicit activities for trust-building. In an August Advisory Group meeting, I introduced the book *Teaming* by Amy Edmonson (2012), expert on organizational learning, and suggested we do a group read and discussion of the chapter on how to build psychological safety in teams. Later I learned, through informal conversations with members of the Advisory Group, that they felt the need to be explicit about building trust was not necessary. They believed it would come from engaging in the work together. Thus, I adjusted my process and planned no additional trust building activities.
Given their silo-driven history, members of the Advisory Group needed to learn to be vulnerable in an effort to create a coherent, district-wide implementation plan. A few sticky moments surfaced as colleagues began to have more transparent discussions about one another’s work. I likely contributed to the first of these sticky moments in planning the launch of the Strategy 2 Implementation Team. Following a discussion in a previous Advisory Group meeting, I understood our next steps would be to run a simulation to determine what might work well for the Strategy 2 Implementation Team’s launch and work plan. For this exercise, I planned an agenda that included identifying the users of Strategy 2, asset mapping, identifying outcomes and determining measures. As soon as I started to model this process, the Chief whose body of work is situated in Strategy 2 expressed a desire not to engage in this process and explained he already knew this content area. My protocol then stalled and another Advisory Group member took the lead in determining how the work plan for the Strategy 2 Implementation Team might be defined.

As the Advisory Group meetings continued to unfold into the fall months, I observed few occasions when members shared vulnerabilities in the context of the work at hand. There were a couple of moments when vulnerabilities surfaced, but these tended to be around topics not directly connected to the initiative. For example, in the middle of one meeting the conversation shifted to a recent incident involving a long-standing row between two SFUSD students that resulted in the death of one of these students. Many heart-felt emotions and wonderings about how we fix these types of problems were shared.

As noted in my RKA, a close cousin of vulnerability - comfort with conflict - requires a willingness to be transparent with one’s thinking, as well as a commitment to speak up. There were moments of disagreement amongst the members of the Advisory Group. Though points of contention were discussed, they often fell short of reaching a
mutual understanding and agreement. On some accounts, different points of view were dropped out of the conversation or the topic was shifted in a different direction. In some of my off-line conversations, colleagues shared their differences of opinion; however, when the same topics surfaced in Advisory Group Meetings, they chose not to share their perspectives or thinking in that moment. I also chose not to invite them into the conversation to share in these moments, and thus, potentially perpetuated the very problems associated with trust and vulnerability that I write about.

A turning point came in the December Advisory Group meeting when many of the members expressed previously unspoken beliefs and concerns about their collective work. One member started the discussion by raising concern about the lack of district-level core teacher competencies. Quickly thereafter, the conversation shifted to broader district-level concerns. Team members started sharing sentiments like: we are modeling for schools exactly what they want to avoid; we are a part of the problem; can we really be coherent; we have cultural norms to protect the status quo; we look good on paper but that’s it; we need to put the brakes on; we are focused on too much; we are an accountability adverse culture; and what’s “really” going to be different this time... with this initiative. By my account, this was the first time that members of the Advisory Group were collectively and actively engaged in naming such problems.

Meeting Protocols

Norms: When I inquired at the launch of the Advisory Group meeting series about the development of initiative specific meeting norms and working agreements, there was no interest to go beyond the existing three central office norms: (1) keep equity at the center (2) be present, and (3) be part of the solution. Therefore, I did not engage the Advisory Group to develop explicit language or behavioral norms for attendance, promptness, preparation,
decision-making protocols, and follow-through. Some members of the Advisory Group expressed, once again, that these types of objectives are better met through doing the work and do not need to be explicitly addressed.

*Agendas:* Strong agendas: tackle the most pressing items first, articulate time allocations for topics, and identify key questions and decision points. After trying various approaches to the agenda design, I struggled to facilitate a meeting in which the Advisory Group stayed on topic and followed the agenda from beginning to end.

In the analytical section of this capstone I will return to potential reasons for why establishing meeting protocols and designing strong agendas was a recurring struggle for me, as I suspect these aspects of my strategic project will be very telling for my own leadership style.

*Accountability for outcomes and follow-through*

As of January, Advisory Group members had been tasked with few deliverables, as the work with Implementation Teams had moved at slower pace than anticipated. However, follow-through was still low. My first attempt in asking members of the Advisory Group to complete work outside of our structured meeting time was unsuccessful. Following an agreement to review and add comments to an initial draft of our work plan, only 2 of 11 Advisory Group members responded. In a later attempt at engaging in a similar feedback protocol, the Advisory Group’s response rate was 0%. Given this outcome, I turned to a few colleagues for suggestions on more effective ways to advance the work. I was told whole group meetings are the primary place where work gets accomplished and to expect email responses to be inconsistent. The most effective way to move work between Advisory Group meetings is to schedule 1-on-1 meetings. As I inquired why this might be happening,
on multiple accounts, colleagues expressed how busy they were and that there were too many competing commitments.

**Implementation Teams**

Implementation Teams were charged with designing implementation plans for the district’s *Six Strategies for Success*. The following discussion on how this process unfolded is outlined in the order in which the Implementation Teams were launched.

**Implementation Team Strategy 2: Safe and Supportive Schools**

The Strategy 2 team leads began by determining what template they would design to solicit the best information from their, soon to be launched, Implementation Team. They moved quickly in the direction of finalizing a template that focused largely on the professional development aspect of the Safe and Supportive Schools Strategy. Concerned that many aspects of effective strategy implementation weren’t being addressed (i.e. asset mapping, accountability systems, feedback loops, rollout mechanisms), I attempted to introduce the logic model for implementation from “Strategy in Action” (Appendix F). However, I was not successful.

At the outset of this group’s work together, I experienced some tension and role confusion. One of the team leads became the default leader. I struggled to engage him in a dialogue about the ideas and suggestions I had. Though not to the same degree, I observed this same dynamic between him and another team lead. While I tried to honor the goal outlined in the Advisory Group Charter that stated team leads should “set the agendas, lead, and facilitate Impact Learning Implementation Teams,” I likely gave too wide a berth. I should have taken a more integral role. Instead, during most of these meetings, I assumed the role of note taker. As time went on, at my invitation, this Strategy 2 team lead and I
spent many productive hours planning for the series of Safe & Supportive Schools Implementation Team meetings.

Further stemming from the initial tension between the Strategy 2 team lead and me, I ran into another glitch when attempting to send emails to potential Safe and Supportive Schools Implementation Team members, inviting them to join the Impact Learning Initiative. These invitations went out on short notice and resulted in some frustration, leaving little time for recipients to digest “the ask” and understand the commitment. The establishment of a meeting cadence, a final roster of team members, and clear work assignments between meetings did not occur. As a result, over the course of 6 meetings, only two members were consistent in attendance. Minimal work product was produced outside of meetings.

As to the content of the work, there was much debate about which documents (either inside or outside of the district) guided the work and represented the direction SFUSD wished to go with the Safe and Supportive Schools Strategy. This led to a fragmented work template. The same team lead I mentioned above, shared at the December Advisory Group meeting that he needed to turn the work over to the district’s content experts to clarify the thinking that sat in the template. He acknowledged that the work had become unwieldy, resulting in a very lengthy document. In my conversation with him, he expressed that this initiative was taking too much of his time.

As mentioned, the intent was for the leads to manage the work with the Implementation Team on which they sat. To that end, I supported the Strategy 2 team, leading from behind while honoring the expectations in the Advisory Group Charter. Moving forward, I took on a different, more in-tandem role with the launch of the
next two strategy team’s work, to include setting the agendas and facilitating the lead team meetings.

As of January, the Strategy 1 and Strategy 5 Implementation Teams had not yet launched. Below, I describe each strategy lead team’s planning efforts.

**Implementation Team Strategy 1: Common Core State Standards**

Appreciating the complications that surfaced in the Strategy 2 team, largely due to the lack of clarity around the boundaries of the work, I focused most of my initial effort with the Strategy 1 lead team on establishing a clear and common definition for our work. Following robust discussion, the lead team members decided to present two options to the Advisory Group for final agreement and approval (Appendix G). This approach created non-negotiable terms for operation, thereby avoiding one of the recurring sticking points for the Strategy 2 team.

In the 2nd Strategy 1 lead team meeting, the group faced precisely the problem the Impact Learning Initiative was aiming to correct - eliminate duplicative work efforts. Tensions arose when conversations about the work of Strategy 1 surfaced the realization that duplicative programming was already underway in the district. Though difficult to hear, the lead team appreciated that these issues had come to the fore and they had the opportunity to course correct. They exhibited patience and persistence in solving this problem. This was particularly significant, as two lead team members have had troubled interactions in the past. Instead, they were interrogating ideas and not each other.

Even in light of this progress, at the top of our 4th meeting, we hit a significant snag. One of the team leads shared that an issue had surfaced at a recent meeting led by the Deputy Superintendent about “Impact Learning. Impact Lives.” This team lead mistakenly thought this issue would directly impact the work of Strategy 1. I had attended the same
meeting, thought otherwise, and attempted to clarify. However, this was not sufficient and our meeting stalled. With the team lead’s permission, I invited the Deputy Superintendent to join our meeting to reassure them that, indeed, the work could move forward as previously understood. As I attempted to move to the next agenda item, I continued to sense some unrest amongst the team. The tone of the meeting had changed. I tried to reengage them in a process to review the “Deliverology” and “Strategy in Action” approaches for strategy implementation. Instead, for the most part, the conversation kept shifting to reasons why the broader Impact Learning Initiative wouldn’t work. We were eventually able to reach consensus on a few tasks for moving the work forward. Shortly after this meeting, the team lead who had expressed confusion at the top of this meeting responded to an email thread and removed himself from the work.

**Implementation Team Strategy 5: Highly Effective Teachers, Leaders, and Staff**

By January, the lead team for Strategy 5 had met three times. As with the Strategy 1 lead team, I set the meeting agendas, facilitated the discussions, outlined the decisions points, and identified next steps. I kept the focus of these first few meetings on clarifying the drivers and the boundaries of the work for this strategy. This was especially critical for Strategy 5 as it has very few descriptors in “Impact Learning. Impact Lives.” Similar to the other strategy teams, there were multiple efforts afoot across numerous departments in the district that already touched this body of work.

The conversation paused when it came to deciding the role of the newly released, Vision 2025. Was this group’s charge to write an implementation plan that re-envision the district’s human capital plan with an eye towards 2025, or were we to stay in the present and refresh SFUSD’s current approach to Strategy 5? Though the Chief of Human Resources sat on this lead team, no one on the team was willing to make the decision. Instead, we
made an appeal to the Deputy Superintendent. He asked that we stay in the present and prepare an implementation plan for “Impact Learning, Impact Lives.” After many hours of inventorying, asset mapping, and defining the current state of affairs, the Strategy 5 lead team decided they would focus on building out an implementation plan for the recruitment, development, and retention of effective teachers, leaders, and staff.

Of note, the engagement level of these four Strategy 5 lead team members was noticeably higher than that of the other Implementation Team Leads. Additionally, 3 of the 4 lead team members were relatively new to their roles and had previously held positions outside of SFUSD. This was not the case in the other two strategy groups.

**My Pivot**

As explained above, by mid-January, minimal work product had been completed. Only the Strategy 2 Implementation Team had begun to populate their implementation template. In early January, there was a series of cancellations of our previously scheduled Strategy 1 and 5 lead team meetings. The Strategy 1 and Strategy 2 lead team structure had started to falter around engagement. Their commitment to shepherd the work was waning instead of advancing.

My sense of urgency to complete the task - the implementation plans – was increasing. In honoring the request from the Strategy 2 Implementation Team Lead to give their template over to the district’s content experts for completion, I used this as an opportunity to incorporate my initial suggestion to use Curtis and City’s *Strategy in Action* logic model implementation template. I, along with the Strategy 2 content experts, was able to complete this new version of the template in less than five hours (Appendix H). At the January 23rd Advisory Group meeting, I announced and received approval for the new direction I had set for the overall Impact Learning Initiative work plan.
By March 1, 2015
- Work with content experts in Strategy 1, Strategy 2, and Strategy 5 to complete the revised Implementation Plans.

By April 1, 2015
- Solicit feedback from departments across the district (including Instruction, Innovation, & Social Justice, Special Education, Human Resources, Early Childhood, Curriculum & Instruction, Family & Community Support, High Schools, Middle Schools, Elementary Schools, and the Superintendent’s Zone Schools) on the Strategy 1, Strategy 2, and Strategy 5 Implementation Plans.

At the close of the April 22nd, 2015 Advisory Group Meeting
- Prepare a protocol and facilitate a process for reaching consensus from the Advisory Group members to finalize the Implementation Plans for Strategy 1, Strategy 2, and Strategy 5.

This pivot allowed me to work directly with the content experts in Strategies 1, 2 & 5 to complete the implementation plans in a more efficient manner. I met with departments across the district to gather additional input and to capture multiple perspectives for each implementation plan. Though not a purist approach to the collaborative and collective work outlined in the Advisory Group Charter, this pivot represented dimensions of cross-departmental work. I must acknowledge, however, that in using this approach I perpetuated the very problem this initiative aimed to solve. While we maintained the cross-departmental structure with the Advisory Group, I abandoned this structure with the Impact Learning Implementation Teams in order to complete the task.

Results

The goals of this strategic project were twofold: focus on (1) a renewed emphasis for how the district implements its strategic plan (2) the way the central office employees collaborated to do their work. Using the research in my RKA, I will discuss the results of
my actions based on these components of strategy execution: systems and structures, implementation plans, budget, and accountability. I will close with a discussion of the Advisory Group’s progress on effective teaming practices.

**Systems & Structures** *(Project Planning and Managing Workflow)*

In an effort to manage this initiative, I made many attempts to establish workable timelines, objectives, tasks, and deliverables. There were many iterations of the Impact Learning Initiative work plan (Appendices I, J, K, & L). For each work plan (or instances where work plan particulars were discussed by the Advisory Group), the highlighted sections are the elements of the work that, to date, either already occurred as written or are projected to occur before fall 2015. These highlighted sections serve to articulate which aspects of the original work plan are in place as of this writing. All of the sections not highlighted are aspects of the initiative that were either dropped or were changed as the initiative evolved. As depicted in these work plan iterations, few elements remain from the original scope of work.

Initially, I relied on email correspondence to manage workflow. However, based on the first few months of my residency, of the emails I sent to colleagues requesting a response, the return rate was very low. After a few months of unsuccessful nudges and reminders, I resorted to using more 1-on-1 meetings to seek and share information in order to advance the work.

For the January Superintendent’s Executive Leadership Team (ELT) meeting, the Deputy Superintendent asked that I complete a Midyear Review on the Impact Learning

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4 Includes the Superintendent, Deputy Superintendents, Chief of Strategy and Development, Chief of Human Resources, General Counsel, and Executive Director of Public Outreach and Communications. I did not attend these meetings.
Initiative. This included an assessment of the progress to date, milestones, evidence, challenges, delays, support needed, and an overall rating score of 1 (low) - 5 (high) (Appendix M). I assessed the overall Impact Learning Initiative at a 3; Strategy 1 (2 rating); Strategy 2 (3 rating); and Strategy 5 (2 rating).

I anchored my measures of progress on the Impact Learning Initiative parameters that were presented to me by the Deputy Superintendent and his Executive Director at the outset of this strategic project (Appendices I & Z). While I return to my expectations for success in the Implications for Self section of this capstone, in many respects I interpreted the results described above as unsuccessful. However, here I will mention how this initiative actually unfolded with respect to project planning and managing workflow was, in many ways, expected and is supported by the literature. While one of Curtis and City’s building blocks for effective execution is establishing clear structures and systems, appreciating that this work is dynamic is another. There’s a balance to strike. These iterations and approaches for moving work may have exemplified a willingness on my behalf, and that of the Advisory Group, to be flexible in the face of newness. The group culture factors outlined in the HBS Framework for Analyzing Work Groups are likely in play here as well. The January ELT Midyear Review meeting notes about the Impact Learning Initiative read, “keeping to timelines is a cultural challenge for all of us.”

**Implementation Plan Work Product**

As outlined in the Advisory Group Charter, two goals are explicitly tied to the process and content for the implementation plans:

1. Engage in professional learning and collaborative work in cross-departmental teams.
2. Develop concrete implementation plans, with defined measures and outcomes, for the *Six Strategies for Success.*
Though the first version of the implementation work template was focused largely on professional development, as explained, in January, I was able to incorporate Curtis and City’s logic model approach for implementation plans. I used this version of the template to work directly with district content experts in each strategy to capture the existing activities, resources, outputs, outcomes, and measures (Goal #2). I then met with other district departments to collect their input on these draft implementation plans. Lastly, I presented the implementation plans to the Advisory Group for final review (Goal #1 & Appendix H). The Deputy Superintendent intends to incorporate the Advisory Group’s recommendations on “organizational capacity-building, strategic resource management, programmatic changes” as related to these strategy implementation plans to “draft and prepare for publishing, a more refined and nuanced 2015-2017 strategic plan” (Advisory Group Charter). As explained in the previous section, while I did not proceed with the intended design to launch and use the Implementation Teams to write the implementation plans, from my pivot, I was able to facilitate the completion of the draft implementation plans and incorporate cross-departmental perspectives and feedback.

While slightly tangential to the work of the Advisory Group, in the course of this initiative, additional considerations surfaced around budget and accountability. In the implementation plan template (Appendix H), budget sits under the ‘resource’ heading and accountability sits under the ‘measures’ heading. As a result of listening to the content experts’ concerns about the district’s effort to properly resource their work and to the Advisory Group’s oft-repeated unease about how this Impact Learning Initiative fits into the big picture, there seemed to be larger questions that could not be fully answered through the
completion of these implementation plans. I decided to seek input from other central office colleagues in an attempt to bring more clarity to this work.

**Budget**

In early January, the topic of budget surfaced in many meetings I attended. These included discussions on when schools would be receiving their next year’s budget, how the Multi-Tiered Systems of Support planned to restructure funding, and how the implementation plans might inform the central office department chief’s presentations to SMART (Strategic Management and Allocation of Resources Team). For January’s SMART meeting, the Deputy Superintendent reorganized the budget sheet according to the *Six Strategies for Success* (Appendix N). From this reorganization, I noticed that Strategy 2: Safe and Supportive Schools had its own line item. Reminded of Curtis and City’s advice, “strategy comes alive when its execution drives the budgeting process,” I took this as an opportunity to crosswalk our Strategy 2: Safe and Supportive Schools draft implementation plan and the budget items from the FY14-15 budget that intersected with Strategy 2: Safe and Supportive Schools (2009, p. 145). I discovered numerous budget activities that the Strategy 2: Safe and Supportive Schools content experts had unintentionally overlooked in the draft implementation plan (highlighted sections in Appendix O). Moving forward, I recommended we do a ‘check and balance’ exercise with each implementation plan to ‘follow the money’ from the FY14-15 budget. I did this to ensure we had a more accurate picture of the existing activities so we could make more informed decisions about (1) continuing to secure the budget for existing activities and (2) requesting funds for future activities identified as needs for developing more thorough and robust strategy implementation plans.
Accountability

In seeking to align the School Quality Improvement Index (SQII) and the strategy implementation plans, I met with the Executive Director of State and Federal Programs. From our conversations, we connected with other colleagues (Director of Performance Management, Coordinator of Family and Community Partnerships, Manager of Internal Communications) with an active desire for mapping coherence across numerous district priorities, plans, and accountability structures. This resulted in various brainstorms about how these components could be coordinated (Appendices P, Q, R, S, & T). As illustrated, the various versions were built towards creating clarity. My hope is that from this coherence work we will be better able to list detailed and specific ways to assess student performance in the ‘measures’ column for each of the strategy implementation plans.

While the budget and accountability conversations are still in process, I’m encouraged that my attempt to create greater alignment will continue to bolster the accuracy, content, and coherence of the implementations plans, and will, in turn, lead to wiser decisions about “organizational capacity-building, strategic resource management, programmatic changes, or rationale for structural changes” in order to enhance the next iteration of the strategic plan (Advisory Group Charter, Appendix E).

Teaming

For the reasons described in the Description section, I was unable to incorporate the explicit tools outlined in Curtis and City’s building blocks for high-functioning leadership teams nor those in Katzenbach and Smith’s behaviors of effective teams. In the same way culture was referred to as amorphous in my RKA research, teaming felt amorphous in my strategic project which made evidence collection challenging. Therefore, these results on effective teaming practices are based only on two of Curtis and City’s five building blocks -
purpose and clarity; and capacity. I was unable to collect evidence on the right people, structures, and accountability building blocks.

Purpose and Clarity:

At the August 27, 2014, Advisory Group meeting, I requested that members respond to the following prompts regarding the proposed Advisory Group responsibilities:\(^5\): “What resonates with you?” and “What questions do you have?” Responses included:

- “What is meant by advise, provide insight, champion, take ownership?”
- “What are the ‘roles for us?’”
- “How are we defining actions when work overlaps?”
- “As we identify work streams, how do we align and advise related functions to this work?”

Given this feedback, I continued to revisit the goals, deliverables, and role expectations, as outlined in the Advisory Group Charter. In our Advisory Group meetings, I mapped our progress to date in the October meeting (Appendix U); revisited the Impact Learning Initiative goals to ensure understanding in November (Appendix V); and reminded the team of the details of the end product (implementation plans) in December (Appendix W).

During January’s meeting, I again asked the Advisory Group members to respond to two prompts: “What’s working well with the Impact Learning Initiative?” and “Moving forward, what suggestions do you have to improve the Impact Learning Initiative?” Responses included:

- “Coherent structures and approaches are beginning to emerge.”
- “Collaboration between departments is moving in a positive direction.”
- “Identification of opportunity to leverage interdepartmental work to meet mutual goals.”

\(^5\) These responsibilities were eventually incorporated into the Advisory Group Charter dated September 9, 2014.
• “I still feel as if there is not total synchronistic movement forward.”
• “The conversations on our team have been productive and allowed us to make agreements on design.”

It appeared that progress, though slower than I anticipated, was made on ensuring that the members understood their roles and that the Impact Learning Initiative purpose was clear.

Capacity:

This building block addresses trust building, vulnerability, and conflict. In the December Advisory Group meeting, many members shared sentiments that I feel surfaced due to an increased sense of trust from having spent more time together. I was reminded in January that this is a process and that there was more progress to be made. On four separate occasions when I shared project status updates with members of the Advisory Group, they offered explanations for the challenging relationships amongst group members. They went on to empathize with me and shared sentiments such as, “It’s not you,” and “It’s not personal.” Also in the January ELT Midyear Review meeting notes, and in reference to the Advisory Group, it was noted, “There has been a lot of interpersonal development work.”

Analysis

“People may initially assess and address problems realistically. But if this does not pay early dividends, moving into a protective posture may take precedence over enduring the prolonged uncertainty associated with weighing divergent views, running costly experiments, and facing the need to refashion loyalties and develop new competencies” (Heifetz, 2009, p. 85).

As described, SFUSD routinely ranks among the top performers and often takes 1st place as the highest achieving on state assessments. Yet, the district continues to manage a widely acknowledged perennial achievement gap. The Superintendent and Deputy Superintendent signaled that they strongly believe that closing this gap and continuing to increase performance for all students will require a new level of system-wide coordination. They believe this new path must include a shift in how departments in the district work.
together. They also realize that cross-departmental teaming is likely to be quite disruptive to the system. This kind of jolt to a system requires a deep understanding of the power of organizational culture in the face of change. Previously in this capstone, I quoted Drucker saying, “Culture eats strategy for breakfast.” Having led this Impact Learning Initiative, I’d suggest culture not only eats strategy for breakfast, it has it for lunch and dinner too.

In my RKA I briefly described organizational culture and the Analyzing Work Groups framework that I will use to analyze this initiative. However, given the pervasive nature of culture that I experienced while working on this initiative, I believe further discussion on culture is warranted. Culture embodies the folklore, rituals, group norms, and meeting protocols of an organization and “powerfully determines what is considered acceptable and unacceptable behavior” (Heifetz, Grashow, & Linsky, 2009, p.57). Before attempting to change it, one must be exceptionally skillful in accurately diagnosing it. Heifetz, Grashow, and Linsky, widely acknowledged experts on tools and tactics for organizational change, suggest that understanding political relationships within an organization is essential to facilitating change. “The key assumption behind thinking politically is that people in an organization are seeking to meet the expectations of their various constituencies. When you understand the value of those expectations, you can mobilize people more effectively” (Heifetz et al, 2009, p. 89). I experienced varying levels of engagement throughout the Impact Learning Initiative and suspect this variation was due, in part, to constituency expectations. Accurately diagnosing the political landscape requires a deep understanding of each individual’s values, loyalties, losses at risk, and hidden alliances (Heifetz et al, 2009, p. 91).
Table 2. Key Questions for Diagnosing the Political Landscape

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<th>What are the commitments and beliefs guiding the behaviors and decision-making process?</th>
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<tr>
<td>Loyalty</td>
<td>What obligations does the person have to people outside his or her immediate group?</td>
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<tr>
<td>Losses at risk</td>
<td>What does the person fear losing if things should change?</td>
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<tr>
<td>Hidden alliances</td>
<td>What shared interests does the person have with people from other major stakeholder groups that could lead the person to form alliances that could build influence?</td>
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Building on this greater appreciation for the power of culture, I will now propose a potential explanation for why the Impact Learning Initiative unfolded as it did. To guide this examination I will rely the HBS Framework for Analyzing Work Groups as described in the RKA section of this capstone (Appendix X). Using the four components of the framework (context, design factors, group culture, and effectiveness outcomes), I will attempt to interpret my role and approach in the Impact Learning Initiative. I will also incorporate the tools and tactics for diagnosing the political landscape to allow for a deeper analysis of the initiative’s events. I will then turn to the Advisory Group’s progress to provide a possible explanation for why their actions may have been predictable and understandable given SFUSD’s context. Lastly, in the Implications for Site section, I will offer recommendations based on this analysis for moving this organizational change effort forward in SFUSD.

Mapping the Analyzing Work Groups framework onto the way my strategic project evolved, I believe I entered the framework with a perceived need and desire to address group culture through teaming practices. When these teaming practices didn’t take root with the Advisory Group, I focused my energies on the design factors, in particular, the task design. Concerned about the pacing of the initiative, I started to pay more attention to SFUSD’s context to answer the larger question of ‘why’ this initiative wasn’t unfolding in the
way I had expected and why the culture was the way it was. Towards the end of my strategic project, I focused on potential ways to make performance effectiveness feel a bit safer for the members of the Advisory Group; the assumption being, if I could bring more coherence to the ways in which the Six Strategies for Success are linked to performance, this rationale might make performance measures easier to welcome.

**Group Culture**

As described in the introduction, I understood the Impact Learning Initiative to be two-pronged: form a new cross-departmental team structure (Advisory Group) and execute on a task (Six Strategies for Success Implementation Plans). Appreciating the magnitude of both of these asks, I prioritized establishing a group culture and working agreements that reflected the goals and objectives outlined in the Advisory Group Charter. Using the norms, structures, and accountability tools outlined by Curtis and City and Katzenbach and Smith, I intended to use these aspects of culture to “set the tone of the team’s interactions and become the ‘rules’ for how members behave and get their work done” (Hill, 1995, p. 10). I had hoped in establishing these agreements we would have more clarity on what Hill (1995) believes are integral to changing cultures:

- Distribution of power and influence.
- Communication patterns within the team.
- What topics are considered legitimate for discussion.
- How conflicts are managed. (p. 11)

When I realized there wasn’t a desire to engage in these direct and explicit conversations about the Advisory Group’s culture, I turned to executing on the task, hoping I would have more agency in this area of the work. However, I quickly realized without the agreed upon tools that sit inside the Group Culture box on the framework, I felt hamstrung to move the work. I resorted to leading the Advisory Group by asking lots of questions. I felt I had to
rely heavily on the questioning technique because there were no agreements I could fall back on in order to lead with confidence. This absence of agreements may also explain why I had such a challenging time holding colleagues accountable for moving work.

The question still remains as to why the Advisory Group preferred not to engage in explicit behaviors for building a new cross-departmental team. Drawing from my previous professional experiences and conversations with SFUSD colleagues, some possible reasons include:

- Creating behavioral norms was too much of a stretch given the current central office norms of: keep equity at the center; be present; be part of the solution.
- Rarely in central office meetings do colleagues use norms and/or agreements to ground or refocus discussions.
- Concern that establishing norms would give clear boundaries for addressing problems more directly which may lead to moments of discomfort.
- Fear of not being able to live up to working agreements.
- Does equity mean every opinion is right?
- A history of disagreements amongst the members of the Advisory Group made the members less likely to want to work together as a team.
- A desire to protect the status quo thereby avoiding change.
- Not recognizing a need for change or resisting the change because it was requested from their more senior directors.
- An awareness that not establishing behavioral norms was likely maladaptive for the team, but also a sense that doing so may come at a cost and perceived as a loss of power, reputation, social capital, etc.

Or the reason may have sat in my approach to the launch of this initiative. In diagnosing the political landscape, Heifetz et al explain the importance of “uncovering values driving behavior” (Heifetz et al, 2009, p. 91). They suggest, “To mobilize stakeholders to engage with your change initiative, you have to identify their strongest values and think about how supporting your program would enable your stakeholders to serve those values” (Heifetz et al, 2009, p. 92). Had I done a more thorough inventory of each of the Advisory Group member’s core values, I may have been able to identify natural links to the Impact Learning Initiative’s primary goals and then been more explicit about how this effort was complementary to individual member’s core values and work, thereby increasing engagement.
at the outset. While conducting these core values inventories, I could have simultaneously
explored some of the potential reasons for resistance I outlined above. These potential
reasons are common to change efforts and it would have behooved me to capture them in
the form of a questionnaire for 1-on-1 discussions with the members of the Advisory
Group.

I would be remiss not to consider my role as a resident and a leader of this initiative
and the Advisory Group. I was an outsider, from Harvard, who used academic language and
scholarship to attempt to shift seasoned, senior-level leaders who were exceedingly busy and
were being asked to radically alter their way of doing business.

**Task Design: Variety and Scope (Time)**

Though I was able to eventually complete the strategy implementation plans, another
task design element may have presented a challenge throughout the execution of the Impact
Leaning Initiative. On multiple occasions members of the Advisory Group expressed both a
concern over their lack of time to commit to the monthly meetings and the amount of time
the overall initiative required. Parity came into question regarding the number of meeting
hours and member composition. Last year, the Superintendent’s Cabinet meetings met twice
monthly for two hours. This year many of the leadership structures and meeting
membership changed. As a result, for 2014-2015, the Superintendent’s Cabinet meetings
occurred once monthly for two hours (Appendix Y). The monthly Advisory Group
meetings were intended to take the place of three hours formerly scheduled for the
Superintendent’s Cabinet meetings. In addition, the Advisory Group members were
expected to meet monthly with the Implementation Teams for four hours, a plan which the
members cancelled at the December Advisory Group meeting. If implemented as initially
planned, this would have resulted in an additional five hours of monthly meetings for the Advisory Group.

Further complicating this shift in leadership structure was the expectation around membership. There were colleagues who were part of the Superintendent’s Cabinet meetings but were not invited to join the Advisory Group. The rationale for who was expected to serve on the Advisory Group wasn’t explicitly shared with the Advisory Group. These very practical concerns about the disparity in time commitment, as well as membership parity, may have further contributed to the lack of active leadership on the behalf of the Advisory Group for the Impact Learning Initiative. This effort appeared to be an add-on to their already full plates. Rightfully so, as their daily duties as assigned seemed to be terribly taxing with respect to time, with some Assistant Superintendents in the Advisory Group supervising upwards of 20 school sites.

Context

By February, in 1-on-1 conversations, most of the members had shared with me some aspect of a difficult conversation they’d had with other members on the Advisory Group. As I reflected on these disagreements, it seems that most were rooted in a difference of perspective on the district’s priorities. Furthermore, it seemed that many of these differences could be traced back to contextual factors from the last two decades – the strategy for how to improve teaching and learning, the history of decentralization, and the state financial crisis. These themes are reflected in the Context box on the HBS framework. In not carefully considering the strategy, history, and financial context, I underappreciated the need to do a “careful diagnosis of the antecedents and consequences” of SFUSD’s central office culture and that “members of the senior team frequently are the
products of the very systems, structures, and values that need to be changed” (Hill, 1995, p. 15; Tushman, 2002, p.187).

**Organization’s Strategy: Buy-in & Support for New Knowledge**

In my conversations with central office colleagues, concerns surfaced about the lack of implementation of the strategic plan in schools and classrooms. Were principals and teachers routinely referencing “Impact Learning. Impact Lives.” as a guiding document for how the district does its work? When I inquired further about this apparent lack of execution at the school level, I learned that “Impact Learning. Impact Lives.” was written during the summer of 2013. It did not benefit from extensive feedback from focus groups and key stakeholders in the district. A member of the Advisory Group shared that he first learned about “Impact Learning. Impact Lives.” at the district’s system-wide All Administrators meeting in late summer 2013. It may be the case that members of the Advisory Group did not have ample opportunity to offer input at the conception of “Impact Learning. Impact Lives.” This may have contributed to their hesitation to fully embrace the writing of the strategy implementation plans.

However, the Advisory Group’s insistence to start with a pilot implementation team may have bolstered buy-in at the outset of this initiative. As explained, in September, the Advisory Group requested we “slow down to speed up.” Instead of launching all six Implementation Teams, the Advisory Group decided to start small and pilot the Strategy 2 Implementation Team. John Kotter, expert on strategy execution, “suggests that for change to be successful, 75 percent of an organization’s management needs to ‘buy into’ the change.” “Don’t panic and jump in too fast because you don’t want to risk further short-term losses – if you act without proper preparation, you could be in for a very bumpy ride” (Sykes, Thomas, Lloyd, & Stuart, 2012, p.26). This decision to begin with a pilot – to take
the time to determine the best approach for the work - is further supported by Payne who cautioned that implementation should be done with the intent to learn, not with intent that plans will always work.

There may be another aspect concerning the content of “Impact Learning. Impact Lives.” that further explains the Advisory Group’s reluctance to champion this initiative. The majority of the Advisory Group members have been in the district for 5+ years and have institutional knowledge of what a strategic plan represents in SFUSD. Though prior SFUSD strategic plans outlined the mission and vision for the district, “Impact Learning. Impact Lives.” added another layer that describes what each strategy looks like in central office, schools, and classrooms. This layer is more descriptive about the core of the district’s work – teaching and learning. Accordingly, getting closer to what teaching and learning looks like in the classroom requires a different expertise for strategy execution. It requires mastery of classroom instruction. This shift, in turn, requires different actions and levels of understanding from central office. They, too, need to become masterful instructional leaders - a shift, in which some Advisory Group members may need additional support, though through no fault of their own. Of note, and in contrast, the members of the Advisory Group who were relatively new to SFUSD exhibited high levels of engagement for the initiative and seemed to be more fluid and familiar with this new level of instructional knowledge needed to implement the *Six Strategies for Success*. It is possible that they were able to be more receptive to this shift in knowledge required by “Impact Learning. Impact Lives.” because they weren’t faced with the challenge of assimilating the ways of the past with the present.

The role of central office is changing throughout public school districts in the United States. This transformation is likely one of the reasons “Impact Learning. Impact Lives.”
outlines what the Six Strategies for Success should look like in central office. To make this reform attainable, central office leaders, and in this case, the Advisory Group may need additional support in developing new capacities. In the report, “Central Office Transformation for District-wide Teaching and Learning Improvement,” the authors highlight this importance and claim, “central office administrators’ knowledge of high-quality instruction has been emerging as fundamental to implementing ambitious standards-based curricular reforms” (Honig et al, 2010, p.7). They go on to acknowledge, “efforts to engage urban district central office administrators in the kinds of leadership that district-wide teaching and learning improvement demands are akin to trying to reverse the direction of a large ocean liner cruising full-speed ahead” (Honig et al, 2010, p. 8).

It may have been an unreasonable expectation to assume that the members of the Advisory Group had high degrees of comfort with the Six Strategies for Success. This gap in efficacy may have been further exacerbated in expecting the members to lead the Implementation Teams and write implementation plans in a new capacity that they themselves were still developing. “Resistance to change stems from a fear of losing something important” (Heifetz et al, 2009, p. 96). Engaging in cross-departmental discussions about the Six Strategies for Success and leading Implementation Teams may have been experienced a loss of competence (though, hopefully only temporary), while the Advisory Group was getting up to speed on the district’s key strategies. The “loss at risk,” in this case, efficacy and competency, is described by Heifetz et al as sometimes difficult to “ferret out” but once identified, leaders of change efforts must “help people survive them” or their stakeholders are likely to retreat (2009, p. 96).
Organization History: Decentralization

Another possible contextual reason the Advisory Group was reluctant to take up the mantle to actively work with each other in a team setting may stem from the district’s 2001 decentralization effort. Former Superintendent, Arlene Ackerman’s decision to decentralize and grant schools more autonomy is still a topic of discussion in today’s SFUSD culture. On many occasions during my residency, central office staff referenced Ackerman’s superintendency. Though she left the district in 2006, my colleagues frequently referenced her influence and many seemed to feel that the impact of her initiatives is still very present in the current work of the district. In some cases, they associated her effort to lead the decentralization of central office as contributing to the siloed culture in which today’s central office staff is accustomed to working.

In the second year of her superintendency, Ackerman launched a school-based autonomy effort that instituted a new funding mechanism. Using a weighted student formula, she reallocated dollars such that they were based on student needs as opposed to staffing needs. This orientation towards school support required a shift in central office operations. No longer were they seen as a “distant command post,” instead they were transformed into an “accountable service center” for schools (Steinnette, 1993). To further align this new role for central office new accountability structures were developed. As shared by members of the current day senior-level team, this legacy of accountability continues to instill the fear of losing one’s job. One of my colleagues explained that this resulted in a bifurcated approach that he believes is still present in the minds of the SFUSD central office staff today. At the same time Ackerman was implementing school autonomy, she appeared autocratic in her approach with central office.
Additionally, Ackerman’s legacy is still used by leaders in the district to explain some of the current funding practices in central office. In the March Superintendent’s Cabinet meeting, while reemphasizing the district’s commitment to their centralized Multi-Tiered System of Supports, a senior-level team member stated, “Who you know and how long you’ve known them...” will no longer determine resource allocations. This anti-synergistic dynamic, sometimes referred to as the “confederacy of independent schools” by the current San Francisco Unified School District Superintendent, may further explain some of the hesitancy by the Advisory Group members to move towards a more collaborative approach to systems-level thinking.

Though SFUSD is now three superintendents out from Ackerman, her tenure continues to live on in the minds and stories of central office staff as well as those of the Advisory Group. Her initiatives, in some cases, are still used as a reason for why things are the way they are in the district’s present day practices. This is not uncommon when attempting to mobilize such a widespread change effort. Displacement of responsibility is a known coping mechanism for resisting the pain associated with change (Heifetz et al, 2009).

To help counterbalance these sentiments and beliefs, I should have led the Advisory Group through an explicit exercise on identifying the advantages and disadvantages associated with cross-departmental work with the hope that this would have helped to realign interests and loyalties. Additionally, I shouldn’t have stopped with just the Advisory Group. For change efforts such as this, Heifetz et al suggest “broaden(ing) your focus beyond just those in the room, the players most directly involved. Take into account the people outside the room about whom the players care” (Heifetz et al, 2009, p.94). This suggests that I should have also supported the Advisory Group to engage in similar exercises.
with their teams and their constituents, again in hopes of beginning to align and build a system-wide desire for cross-departmental collaboration.

**Financial Markets: The state crisis**

The California state government financial crisis cannot be overlooked as a contributing factor in the current practices of SFUSD. Listed in the Context box on the HBS framework, financial markets deserve consideration when considering an organization’s culture.

The June 2012 “Walking the Talk: Strategic Plan Progress Report,” in referencing diminishing resources states, “While striving to meet the goals of its strategic plan, SFUSD has simultaneously been faced with the most drastic budget cuts in 40 years” (p. 40). While SFUSD’s financial state has improved drastically in the last year or so, colleagues in the district frequently still reference the memory of the crisis. They speak of the Curriculum and Instruction Department being decimated and of enormous funding deficits in Early Childhood Education, just to name a few.

Now the financial times are better and central office leaders can be less concerned with the self-preservation of their departments. However, in beginning to rest easier, they may also feel uneasy about a potential outcome of the Impact Learning Initiative. Explicit in the work of the initiative is the desire to describe the way the district implements the *Six Strategies for Success*. Implicit in the initiative is a consideration for what the district should start, stop, and keep doing in relation to these strategies. This could result in the reorganization of funding streams, much like when the Deputy Superintendent resorted January’s budget sheet to align with the *Six Strategies for Success*. At the February All Administrators meeting on the annual school planning process, the Superintendent announced that this would be the first year, in recent times, the district could engage in
“planning without cuts.” Consequently, even though the department leaders sitting on the Advisory Group may have more money, they may be less interested in sharing or restructuring their recently restored pot of funds. This could be perceived as yet another financial loss, given that they are just now experiencing some degree of financial gain. It may be challenging to shift from a mindset of starvation to one of sharing. As a leader in such situations, it is vital to recognize the stakeholder’s experience. Leadership during a change effort is likely to require “distributing significant losses” and it’s the leader’s job to help the stakeholders “survive them” (Heifetz et al, 2009, p. 96).

**Effectiveness**

The ultimate output in the HBS Framework for Analyzing Work Groups is effectiveness. One of the goals of the Impact Learning Initiative was to build a performance management system based on the *Six Strategies for Success*. Though this goal was not directly discussed with the Advisory Group, it is alluded to in the Advisory Group Charter:

- Develop concrete implementation plans with defined measures and outcomes for the *Six Strategies for Success*.
- Develop and utilize tools to gauge the implementation of the *Strategies in Action* at the classroom and school level.

The implementation plans will eventually be used to develop, in part, a performance measure for members of the Advisory Group. Though a good idea in practice, this new, more granular level of performance evaluation may be anxiety provoking for some, especially since it hasn’t been directly and publicly addressed with the Advisory Group. Along the same line, in district-wide meetings and at board meetings, the Superintendent has spoken explicitly about colleagues “not have(ing) the privilege” to work in SFUSD if they are not in alignment with the beliefs of the system. Taken together, these orientations on performance may have
caused the Advisory Group some fear about job retention, which may have, in turn, result in a complicated set of the motives and actions around their execution of this initiative.

My Role

Reflecting on the Analyzing Work Groups Framework and its application to my strategic project, I misjudged the “intervening role” that contextual factors play in changing organizational culture. While I considered the more immediate antecedents of group culture, I neglected to fully appreciate the historical memories and experiences of the Advisory Group members. I was aware that the Advisory Group might experience this initiative as both countercultural and dissonant. However, I lost sight of the importance of the member well-being factor listed in the framework. Given these contextual factors and the cross-departmental teaming structure, I should have looked for more “opportunities both to satisfy individual needs and to help members stretch and develop” (Hill, 1995, p. 13). On the advice of the SFUSD Superintendent, I did not build in enough supports to better ensure the Advisory Group could move towards becoming a “self-actualized team.”

In reflecting on the Superintendent’s advice, I was reminded of the stages for mobilizing systems-level change outlined by Heifetz et al. Earlier in this capstone I suggested that culture and change may be intractable. I now believe that culture, change, and conflict are inseparable. Heifetz et al invite the concept of conflict into their approach to change efforts and, in fact, claim that is one of the necessary stages for creating change. “You have to seek out, surface, nurture, and then carefully manage the conflict toward resolution, rather than see it as something to be eliminated or neutralized” (Heifetz et al, 2009, p. 151). As I experienced varying levels of conflict amongst the Advisory Group, whether stemming from different points of view about SFUSD’s strategy, resources, priorities, or their participation in this initiative, I did not return and attempt to reinstitute
the principles of effective teaming (which are very similar to Hiefetz et al’s principles for “orchestrating conflict”). Such points of conflict are predictable and, regretfully, I did not seize the opportunity to engage deeply with the conflict and move the Advisory Group towards becoming a “self-actualized team.” Instead, in many respects, I took the work from the team before they had the opportunity to step in and stay in the conflict. I believe, hard-pressed to accomplish the task (implementation plans), I rolled back the Advisory Group’s opportunity to fully practice becoming a highly effective cross-departmental team. By disbanding the Implementation Teams, in many respects, I perpetuated the very problem the Superintendent and Deputy Superintendent were trying to solve.

Implications for Site

On multiple fronts during the 2014-2015 school year, the Superintendent and Deputy Superintendent were intentionally creating environments of disequilibrium throughout the district. As part of this effort to shake things up, they demonstrated a strong determination to narrow priorities, articulate alignment, build coherence, spell out how the district does teaching and learning, and test their beliefs using continuous improvement cycles – all driving towards becoming a learning organization. In very short order, they not only signaled that change was coming, they put into motion new mechanisms to indicate that, indeed, change was happening. Some of these changes included conducting a cross-walk of the numerous district plans and programs to illuminate the through line, explicit and detailed alignment of the budget with the priorities, and a reorganization of school cohorts and support structures. The Impact Learning Initiative was at the center of this shake up – as it is the district’s core work – how it does teaching and learning. This order of magnitude of change invites “conflict, frustration, and panic to confusion, disorientation and fear of
losing something dear” (Heifetz et al, 2009, p. 28). Given this level of distress it can be challenging to persist, but persist they must. Sustaining a change effort can feel insurmountable, especially given the innumerable obstacles.

In many respects the Advisory Group has made progress towards gelling as a team. This progress could be leveraged to sustain the change underway. Heifetz et al refer to this progress as creating a “holding environment” – a group that has a shared language, history of working together, bonds of camaraderie, etc. (Heifetz et al, 2009, p.156). Given the momentum that started to build towards the end of my residency with the Impact Learning Initiative, I believe the Advisory Group is becoming such a “holding environment.” I further believe they should stay intact and continue to meet throughout the next academic year. After the task of completing the implementation plans and publishing the next iteration of “Impact Learning. Impact Lives.” (likely to be renamed “Transform Learning. Transform Lives.”) there is still work to be done. As I acknowledged, while during my residency, the task of delivering on the implementation plans eventually took precedence over that of shifting the organizational culture to one of learning together in cross-departmental teams, the Advisory Group still has a rich opportunity to evolve into a “self-actualized team.” As it is possible that the Advisory Group could become the body politic that models solving complex problems in SFUSD. They could become that powerful and that instrumental in shifting the district towards one of a learning organization. I will now outline three areas for consideration in advancing this work.

1. Communication Plan

“Get the right messages to the right stakeholders at the right times” (Moffit & Kihn, 2011, p. 195).
The rollout of “Impact Learning. Impact Lives.” did not benefit from a widespread communication effort. With the publication of the 2015-2017 strategic plan, SFUSD has the opportunity to reengage its staff “analytically and emotionally to convey the necessary messages in a compelling way” (Moffit & Kihn, 2011, p. 189). As described, the level of change embedded in the Impact Learning Initiative requires leadership to think politically and to diagnosis the political landscape. After the strategic plan is in place, the next layer of work must be addressed and should be addressed through this same lens of thinking politically. Heifetz et al (2009) speak about diagnosing and instituting change in terms of stakeholders – their stake at hand, desired outcomes, level of engagement, and degree of power and influence. Only after assessing each of these factors, should leaders begin to build a strategy for organizational change. Essential to instilling deeper levels of implementation for SFUSD’s next strategic plan will be the execution of a communication effort. Already successfully practiced in the field, there is a methodology that uses the political lens Heifetz et al speak of and takes into account stakeholder perspectives in the development of a communication plan.

The Deliverology model for implementation stresses the need for the development of a communication plan. Using a novel approach - it overlays an “emotional trajectory” onto the “Diffusion of Innovations” framework (i.e. the laggards, late adopters, early adopters, and innovators) for how new ideas spread. This Deliverology approach suggests that the emotions of these stakeholder groups will change over time. In order to project these changing emotions, the current position and relative power for each stakeholder group should be determined. This trajectory is then used to establish specific communication objectives for increasing stakeholder support for implementation (Moffit & Kihn, 2011). The Advisory Group could develop an “emotional trajectory” for the stakeholders in
classrooms, schools, and central office for each of the *Six Strategies for Success*. In particular, this “emotional trajectory” may be especially necessary at the classroom level. Given the absence of school-based representation in the Impact Learning Initiative, this could serve as a tangible effort to ensure a connection is made. These system-wide stakeholder “emotional trajectories” could become invaluable for ensuring deeper support for the 2015-2017 strategic plan.

2. Results-Oriented Cycle of Inquiry

An oft-expressed sentiment in my conversations with the Deputy Superintendent was the desire to deeply institute the use of continuous improvement cycles – in all areas of the district and with all staff, from central office, to schools, to classrooms and on both sides of the organization, the instructional, as well as, operational sides of the system. The drive towards becoming a learning organization is palpable. The district had some history with improvement cycles, but its implementation has been spotty. First adopted in the early 2000s, the Results-Oriented Cycle of Inquiry (ROCI) was intended to be the district’s primary tool to measure continuous learning and improvement. ROCI is written into “Impact Learning. Impact Lives.” as was intended to be the tool for measure continuous growth for the *Six Strategies for Success*. On multiple occasions, my colleagues expressed that ROCI isn’t widely practiced throughout the district. One colleague explained this problem as, “We RO (row) but we don’t CI (see).” The district is strong in setting goals and planning (results-oriented), however, they struggle to follow-through in assessing their actions and adjust accordingly (cycle of inquiry). At the February All Administrators meeting, the Superintendent reemphasized the district’s desire to use ROCI and listed it as one of the district’s “Rules of the Road” (Appendix S). Though maybe suffering from low levels of
implementation, ROCI is clearly still a district priority, but likely in need of additional attention and support.

To bolster ROCI’s usage, SFUSD might consider turning to an already familiar expert in continuous improvement, Tony Bryk. The district successfully adopted Bryk’s three-prong model for school leadership: Instructional Leadership, Inclusive-Facilitative Leadership, and Operational-Managerial. Bryk is a known and well-liked entity across the district. As described by my colleagues, SFUSD is driven by relationships. Maximizing on their already favorable relationship with Byrk, SFUSD could introduce his more recent work on Networked Improvement Communities – a mechanism for structuring how teams learn from each other. Rooted in W. Edwards Deming’s “Plan, Do, Study, Act” (PDSA) cycle of learning, Networked Improvement Communities operate with the goal of “getting better at getting better” (Englebart as quoted in Byrk et al, 2010, p. 6). Considered a prototype for ROCI, PDSA uses a highly structured process to identify a common problem, test it, and incorporate the results into the next round of study. These findings are then shared through networked protocols that span across participants representing multiple communities. Given the district’s success with Byrk’s previous work, a within-community adaptation of Networked Improvement Communities may be a relatively quick and simple process to put into practice to reinvigorate the ROCI model in SFUSD and help the district realize their pinnacle goal of becoming a learning organization.

3. Teachers & Leaders

One of the tenants of SFUSD’s “Theory of Action for Improving the Instructional Core” is a belief in investing in the “professional learning of teachers, leaders, and school staff,” yet their voice was missing in the Impact Learning Initiative. Against our better
judgment in public education, this is often a misstep. In the words of a senior policy advisor in the U.S. Department of Education,

People know the value of moving across silos – engaging with others in different disciplines and departments enriches one’s thinking; it enables cross disciplinary/departmental/organizational problem solving; it prevents duplication of work. It permits wider buy-in, consensus and wisdom. But, when time is short, it is much easier to remain in one’s silo, keep one’s head down and get the work done (Gross, 2012).

I have had first hand experience with silo-driven behavior. I’ve experienced it in every role I’ve held in public education. Despite this, I, and we as an Advisory Group, still fell victim to this type of thinking, of “keeping our heads down.” Moving forward, the Advisory Group should prioritize, cement, and broadcast their commitment to ensuring teachers, leaders, and school staff are not only part of this initiative, but serve as key decision makers for next steps. After all, this is ultimately the type of silo-busting the SFUSD leadership aims to achieve in becoming a learning organization for all – for central office, for schools, and for classrooms.

**Implications for Sector**

As the work of this strategic project applies to the public education field at large, I offer a caution for how to think and go about the work of developing system-level strategic plans and embarking on organizational change in the context of driving towards becoming a learning organization.

**Paradox of Practice**

The concept of ‘paradox’ surfaced in the course of this strategic project. In the midst of my residency, my doctoral advisor alerted me to the paradoxes I had unintentionally created due to the way I had scoped my approach to strategy execution. I was too linear in
my approach, erroneously believing there was a distinct set of conditions necessary for advancing the work. In doing so, I underestimated the power of the legacy behaviors and contextual factors. I offer my learnings about the paradoxes of our practice as caution for how to embrace the work of public school districts across the education sector.

A paradox of practice - when two sound approaches, taken separately, produce favorable results; however, when combined stand in direct opposition. Curtis and City reference paradoxes of practice throughout *Strategy in Action*. They can surface when considering “how loosely or tightly the system is going to manage schools” or how to “focus on all children and, at the same time, on each child” (2009, p.186). A piece published in the World Bank on “Avoiding the Planning Paradox,” calls “ignoring uncertainty when making plans” a paradox and suggests we need to pay attention to “policy making under uncertainty.” “Managing Paradox: the discipline of strategic execution,” warns that, “The annual strategy plan is more like Japanese kabuki drama; a set-piece, in which everyone knows the role they have to play. Bold plans describe intentions and aspirations, but shy away from the more challenging topic of how to execute” (2011, p. 10). Paul Hill, founder of the Center on Reinventing Public Education, alerts us to the broader contradiction that, “public schools are small craft organizations that require close teamwork and constant adaptation to the unpredictable development of students,” yet, “they are government agencies always subject to constraints imposed through politics and legal process” (2012, p. 1). This description mirrors, in many ways, my strategic project in SFUSD – a desire for teamwork while recovering from a major state budget crisis.

“The world of education as we know it is filled with broken paradoxes” (Palmer, 2007, p. 68). Palmer goes on to describe paradoxes that sit in our classrooms – “the space should be bounded and open; the space should invite the voice of the individual and the
voice of the group; the space should welcome silence and speech” (2007, pp. 76-77). He concludes with a way to move forward, “Paradoxical thinking requires that we embrace a view of the world in which opposites are joined, so that we can see the world clearly and see it whole” (2007, p. 69).

My caution to the public education sector is to be open to the existence of paradoxes, to actively look for them, and to learn how to balance them. As it was only with the generous patience of my colleagues that I came to the realization that, in strategy execution, it is possible to “keep the tension in the paradox alive” while going about the work. And as a profession, we need to continue to perfect our practice in “holding the tension of opposites” (Palmer, 2007, p. 86).

Conclusion

This capstone closes with a series of recommendations for effective strategy execution and building high-functioning cross-departmental teams. Yet, this work is far from done. Perhaps, it’s only half done. As John Dewey proclaimed, “A problem well put is half solved.” I suggest it is also the case that “A strategy well put is half executed.” Dewey continues with, “Just because a problem well stated is on its way to solution, the determining of a genuine problem is a progressive inquiry…” (p.173). Dewey calls for progressive inquiry in order to continue along the right track for problem solving. Strategy execution, I argue, should follow a similar course of progressive inquiry.

Once the plans have been laid, the team must remain ever vigilant in the execution of the work. As I write this, the 2015 March edition of Harvard Business Review, “Making Strategy Work – How to Avoid the Traps and Execute Brilliantly,” features an analysis titled, “Why Strategy Execution Unravels – and What to Do About It.” The authors flag five
myths of strategy execution: (1) execution equals alignment (2) execution means sticking to
the plan (3) communication equals understanding (4) a performance culture drives execution
(5) execution should be driven from the top (Sull, Homkes, & Soll, 2015). This list of still
more considerations for how to “make strategy work,” serves as a reminder that this work
must follow the progressive inquiry track that Dewey identifies. As without a determination
to continue to iterate on strategy execution, the traps are sure to be waiting.

This further reminds me of Einstein’s assessment; “We can’t solve problems by
using the same kind of thinking we used when we created them.” While these pathways and
practices for driving for continuous improvement for strategy execution seem endless, we
must hold onto a cycle of inquiry that goes beyond just doing to include reflective thinking.
Ron Ferguson, scholar on educational inequity, exemplifies this kind of thinking over the
course of his career in studying racial achievement gaps. He suggests we move beyond just
closing the achievement gap. Shifting his focus, he now speaks of “excellence with equity”
arguing that we “raise the bar for all students” (Walsh, 2015). Believing that, “The
achievement gap is the greatest civil rights issuing facing SFUSD,” the learnings from this
Impact Learning Initiative could serve as an impetus for the Advisory Group to consider
how their thinking on their chosen pathways and practices for strategy execution might
evolve in order to close the achievement gap. In the words of the SFUSD Superintendent,
it’s all of our jobs to “keep the flame alive” for all of our students. All must mean all.
Bibliography


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**SFUSD’s Six Strategies for Success**

These, our highest leverage strategies to achieve our goals, will have impact at all levels of the system and are our shared roadmap for raising student achievement.

1. Implement the **SFUSD Core Curriculum** and use **student data** to make informed decisions and monitor our progress toward goals.

2. Provide tiered levels of academic and behavior support to all students using a **Response to Instruction and Intervention** (RTI) model.

3. Build a clear vision, culture and conditions for **college and career readiness** at all school levels.

4. Differentiate central office supports to schools through a **Multi-Tiered System of Supports** (MTSS).

5. Recruit, develop and retain **highly qualified teachers, leaders, and staff**.

6. Increase awareness and build the supports necessary to fully implement **SFUSD’s Family Engagement Standards**.
## Appendix C: Example alignment of SFUSD’s Priorities and Plans

<table>
<thead>
<tr>
<th>Local Control Accountability Plan (LCAP)</th>
<th>The LCAP is organized around ten key priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Quality Improvement System</td>
<td>The School Quality Improvement System is organized around three key principles</td>
</tr>
<tr>
<td>Strategic Plan: Impact Learning, Impact Lives</td>
<td>Impact Learning, Impact Lives is organized around Six Strategies for Success</td>
</tr>
<tr>
<td>Vision 2025</td>
<td>SFUSD’s Six Strategies for Success</td>
</tr>
<tr>
<td>Key Components</td>
<td>A key component of the Graduate Profile which describes the knowledge, skills, and dispositions that we expect our graduates to possess as they prepare to leave high school for college and careers</td>
</tr>
</tbody>
</table>

SFUSD’s Six Strategies for Success:

- **Strive for Success**: Improve the students’ academic performance to ensure college and career readiness.
- **Foster Resilience**: Support students to develop emotional and social skills.
- **Empower for Success**: Provide students with the tools and resources to succeed.
- **Compete for Success**: Encourage students to participate in extracurricular activities and competitions.
- **Engage for Success**: Involve parents, community members, and schools to support student success.
- **Support for Success**: Ensure students have access to essential supports, such as after-school programs and counseling services.

Each strategy is designed to support students in achieving academic success, developing critical skills, and overcoming challenges.
IMPACT LEARNING ADVISORY BOARD MEETING

August 27, 2014 :: 2:00 – 5:00pm

Audience: The Impact Learning Advisory Board

- Luis, Liz, Kevin, Carla, Brent, Karling, Monica, Guadalupe, Leslie, Stephanie
- Note: This is only the second time this group has come together, and this meeting is a bit of a restart from the first attempt a couple weeks ago.

Meeting Outcome: Ensure all members of the Impact Learning Advisory Board are knowledgeable about each other’s key work priorities, the intersection with the six strategies, and the connection across work streams.

Talking Points:

• **Collaborative teaming, breaking down silos:**
  This is a tremendous opportunity to engage in a new way of working and ‘being’ together as colleagues. This new cross-functional structure will spur on a new level of synergistic collaboration in our district. This level of collaboration has the potential to be so powerful that it will live on past this first level of work around the development of the strategy toolkit.

• **Honoring your time & dedication to this work:**
  I applaud you for expressing such a deep level of interest in each other’s work. This seems like exactly the right way to start – it’s a ripe opportunity to be thoughtful about how our collective work and how it explicitly connects to the six strategies in Impact Learning. Impact Lives.

• **Moving forward, expanding the work to district teams:**
  I’m greatly looking forward to the Impact Learning Teams (ILT) Launch. (date is still to be finalized by this advisory board, hoping for October 7th)
SFUSD Impact Learning Advisory Group Charter

Our Goals & Deliverables:
* Engage in professional learning and collaborative work in cross-departmental teams
* Develop a deeper understanding of our collective work towards shared goals and gain greater clarity of leadership roles
* Provide leadership for the implementation of SFUSD’s strategic plan Impact Learning. Impact Lives.
* Develop concrete implementation plans, with defined measures and outcomes, for the Six Strategies for Success
* Develop and utilize tools to gauge the implementation of the Strategies in Action at the classroom and school level
* Based on this work, begin to draft and prepare for publishing, a more refined and nuanced 2015-2017 strategic plan

Our Role Expectations:
* Actively participate in Advisory Group meetings to progress monitor and champion our collective work and ensure completion of deliverables
* Set the agendas, lead, and facilitate Impact Learning Implementation Team work sessions
* Advise and offer recommendations to sponsoring Deputy Superintendent, especially in issues related to organizational capacity-building, strategic resource management, programmatic changes, or rationale for structural changes

Our Work Plan:
Near Term:
1) Plan for October 7th Launch on Strategy 2 (Academic RTI & Safe and Supportive Schools)
2) Identify first round of Impact Learning Implementation Team strategy leads and members (4 for each aspect of Strategy 2)
3) Determine the facilitation and structure for the 4-hour session, which may require another meeting before October 7th Launch
4) Identify processes and tools for the current state of Strategy 2 and for moving towards a consensus on an ideal state for Strategy 2

Long Term:
1) Use the learnings from the Strategy 2 process to build out the process for the other Strategies for Success
2) Produce and calibrate an Impact Learning Implementation Manual including rubrics, assessment tools, feedback protocols, and aligned professional learning

Our Team Members: Karling Aguilera-Fort, Liz Blanco, Carla Bryant, Leslie Garner, Guadalupe Guerrero, Stephanie Myers, Bill Sanderson, Brent Stephens, Kevin Truitt, Luis Valentino, Monica Vasquez

Our Meeting Schedule:
1st Tuesdays, 12:00-4:00p – Impact Learning Implementation Teams
2nd Tuesdays, 3:00-5:00p – Impact Learning Advisory Board

Our Decision-Making Process (TBD on 9/16)
* A possibility: Fist to Five with a commitment to discussion followed by majority rule
Appendix F: Logic Model for Strategy Implementation (Curtis and City, 2009)
Our Proposal

**STRATEGY 1**

Our goal is to create access to the CCSS for all students. We will focus on the implementation of CCSS for our staff and ensure they can deliver good culturally and linguistically responsive instruction.

**RTI**

RTI is a framework which will help us deliver supports to students at all levels, both academically and social emotionally. The goal is to further our ability to help all students achieve and succeed.

**Strategy 1 and the holistic RTI plan must be very tightly linked**

---

**TIER 1: Core, Universal Instruction & Supports**

General academic and behavior instruction and support provided to all students in all settings.

**TIER 2: Targeted, Supplemental Interventions & Supports**

More targeted instruction/intervention and supplemental support in addition to and aligned with the core academic and behavior curriculum.

**TIER 3: Intensive, Individualized Interventions & Supports**

The most intense (increased time, narrowed focus, reduced group size) instruction and intervention based upon individual student need provided in addition to and aligned with Tier 1 & 2 academic and behavior instruction and supports.

**Common Core State Standards**

Our Proposal
### Appendix H: Strategy 2 Implementation Plan based on logic model (excerpt)

**Strategy 2**  
Safe and Supportive Schools: Implementation Plan  
(Inclusive of RTI)

***This Safe & Supportive Schools Implementation Plan includes feedback from these divisions: SPED, Early Ed, Elementary School, Middle School, Access & Equity***

<table>
<thead>
<tr>
<th>Activities (with overall definition)</th>
<th>Resources (money, time, people, and internal/external resources)</th>
<th>Outputs/Dissemination (immediate results of the program activities)</th>
<th>Outcomes (impact on behaviors, knowledge, and skills)</th>
<th>Measures (how will we know if we achieved the outcomes)</th>
</tr>
</thead>
</table>
| **Restorative Practices:**          | - 6 Coaches (1 per group of 20 schools)                       | - RP PD offered to all sites through the SSSR institute series and after school trainings and differentiated trainings for school sites and PLCs | - All SFUSD schools will have the capacity to offer high quality restorative practices to their students as required by the Safe and Supportive School Resolution. (All tiers) | **SQI**  
Culture and climate  
Suspension and expulsion  
Attendance  
SEL outcomes 1-3  

**Fine Grain**  
Universal Screener  
Office Discipline Referral (CORF)  
PD attendance  
(cornerstone transcripts)  
BAT Tracks of site based trainings.  

**SPED:** How does the use of RP correlate with suspensions and/or expulsions across all grade  

- Restorative practices will be fully integrated in to the district’s PBIS system. (All tiers)  

- Media website and communication support  

- Conference budget (Professional development for coaches)  

- 1.0 Administrator  

- 1.0 Clerical support  

- Extended hours for staff training (catering)  

- Materials (integrated kit under development)  

- Media website and communication support  

Early Ed: Teaching
### Appendix I: Iteration of the Impact Learning Initiative Work Plan

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 2ⁿᵈ</td>
<td>10:00a-4:00p</td>
<td>Kick-Off! Orientation to Broader District Leadership Structures, Expectations of ILTs Developing Group Working Norms and Roles/ Responsibilities</td>
</tr>
<tr>
<td>October 7ᵗʰ</td>
<td>12:00-4:00p</td>
<td><strong>ILT Infrastructure and Templates Launched</strong>&lt;br&gt;<strong>Work Plan Draft Completed</strong></td>
</tr>
<tr>
<td>November 4ᵗʰ</td>
<td>12:00-4:00p</td>
<td>Team Work Time</td>
</tr>
<tr>
<td>December 9ᵗʰ</td>
<td>10:00a-4:00p</td>
<td>ROCI Cycle 1&lt;br&gt;<strong>All rubrics and self-assessment tools developed and validated/calibrated</strong></td>
</tr>
<tr>
<td>January 6ᵗʰ</td>
<td>12:00-4:00p</td>
<td>Pulling Semester 1 Work into an MTSS Framework</td>
</tr>
<tr>
<td>February 3ʳᵈ</td>
<td>10:00a-4:00p</td>
<td>ROCI Cycle 2&lt;br&gt;MTSS Recommendations from Team</td>
</tr>
<tr>
<td>March 3ʳᵈ</td>
<td>12:00-4:00p</td>
<td>MTSS Rationale Shared &amp; Teams Prepped for School Planning Retreat</td>
</tr>
<tr>
<td>April 7ᵗʰ</td>
<td>12:00-4:00p</td>
<td>Professional Development/ Learning for the Year Given Calibrations &amp; Assessments from the Year</td>
</tr>
<tr>
<td>May 5ᵗʰ</td>
<td>10:00a-4:00p</td>
<td>ROCI Cycle 3/ Presentations of ILT Work Over the Year&lt;br&gt;<strong>Next Level of Work: Impact Learning. Impact Lives. 2015-17</strong></td>
</tr>
<tr>
<td>June 2ⁿᵈ</td>
<td>12:00-4:00p</td>
<td>Synthesized Tool Kits for the Year Ahead&lt;br&gt;Finalize Content for Strategic Work Plan Celebration!</td>
</tr>
</tbody>
</table>
## Impact Learning Advisory Board Draft Timeline

**To Review at 8/27 Meeting**

<table>
<thead>
<tr>
<th>Meeting Date</th>
<th>Meeting Focus</th>
<th>Broader Goals</th>
<th>After Meeting Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, 8/27</td>
<td>Group presentations, Working agreements, Decision-making protocol</td>
<td>Getting to know each other’s work, Laying the foundation</td>
<td>Continue to reflect on the connection between your body of work and the six strategies</td>
</tr>
<tr>
<td>Friday, 9/5</td>
<td>Group presentations, Articulate ILT goals</td>
<td>Getting to know each other’s work, Laying the foundation</td>
<td>Send informal save-the-date for potential strategy team members</td>
</tr>
<tr>
<td>Tuesday, 9/9</td>
<td>Determine deliverables, Team formation, Timeline</td>
<td>Setting it up, Preparing the strategy teams</td>
<td>Formally invite the strategy team members and co-conveners</td>
</tr>
<tr>
<td>Tuesday, 9/16</td>
<td>Finalize operational aspects, ILT Kickoff planning</td>
<td>Scope out roles and responsibilities to execute Kickoff</td>
<td>Send strategy team member reminder and flag pre-work</td>
</tr>
<tr>
<td>2 week block before launch</td>
<td>Preparation for ILT Kickoff</td>
<td>Planning and setting-up for Kickoff</td>
<td>Team time in ILT Advisory Board or other structures to prepare for Kickoff, Send pre-work</td>
</tr>
<tr>
<td>Tuesday, 10/7</td>
<td>ILT Kickoff &amp; Launch!</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SFUSD Impact Learning Advisory Group Charter

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**Our Decision-Making Process** (TBD on 9/16)

* A possibility: Fist to Five with a commitment to discussion followed by majority rule
Appendix L: Iteration of the Impact Learning Initiative Work Plan

As of November 10, 2014
Impact Learning Initiative (excerpt from Advisory Group Agenda)

2. **Review Meeting Cadence**

   1. **1st Tuesdays, 12:00-4:00p** – Impact Learning Implementation Teams
   2. **2nd Tuesdays, 3:00-5:00p** – Impact Learning Advisory Group

Q2. How might we structure the next Impact Learning Implementation Team meeting on Tuesday, December 2nd, 12:00-3:00/4:00pm??

**Possible Structure:**

12:00-1:00pm –

- Welcome & Orient Strategy 2: Academic RTI and Strategy 5 Implementation Teams
- Attendees: Advisory Group & All (3) Implementation Teams

1:00-3:00pm?? – Break Out Groups (Bret Harte)

- Launch Implementation Teams: Strategy 2: Academic RTI and Strategy 5
- Continued Work: Strategy 2: Safe and Support Schools

***Advisory Group float across Break Out Group***
### SFUSD Priorities

<table>
<thead>
<tr>
<th>Progress to Date/ Key Milestones Met/ Evidence?</th>
<th>Challenges/ Delays/ Support Needed?</th>
<th>Rating 1-5 (1 low, 5 high)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Six Strategies for Success</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Impact Learning Initiative &amp; Advisory Group:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evidence of increased vulnerability in sharing concerns about district focus, competing priorities, and duplicative efforts.</td>
<td>Reaffirm commitment to strategic plan.</td>
<td>3</td>
</tr>
<tr>
<td>Established Implementation Team Leads and Working Group membership for 3/6 Strategies.</td>
<td>Reassurance that increased support for implementation will be provided in schools and classrooms.</td>
<td></td>
</tr>
<tr>
<td>Had multiple conversations to clarify definition and scope of the strategies.</td>
<td>Need continued reinforcement in the messaging around the urgency for higher levels of implementation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Need to set a hard deadline for project completion (while also accounting for budget considerations).</td>
<td></td>
</tr>
<tr>
<td><strong>Implement SFUSD Core Curriculum</strong> and use student data to make informed decisions and monitor progress toward our goals.</td>
<td>Calendaring a committed team to begin completing a work plan.</td>
<td>2</td>
</tr>
<tr>
<td>Determined how Strategy 1 and Strategy 2 (Academic and Behavioral RTI) will intersect and the roles of the multiple RTI working groups.</td>
<td>Need informal words of encouragement for Implementation Team to increase work momentum and stress importance.</td>
<td></td>
</tr>
<tr>
<td>Narrowed focus to Common Core Language Arts and Math.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finalizing the work plan template best suited for this content. Lending towards an expanded logic model approach.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Provide tiered levels of academic and behavior support to all students using a Response to Intervention model.</strong></td>
<td>Ensuring implementation plan doesn't become too cumbersome.</td>
<td>2</td>
</tr>
<tr>
<td>Renamed as “Safe and Supportive Schools.”</td>
<td>Communicating how RTI will be nested under “Safe and Supportive Schools”</td>
<td></td>
</tr>
<tr>
<td>Determined this strategy's content will sit under the “Social Emotional Learning and Culture/Climate” aspects of SQII.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created, and partially completed, initial draft of implementation plan.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### SFUSD Priorities (Impact Learning, Vision 2025, SQIS)

| Increased WSF / Direct Site Allocations |
| Collective Bargaining Agreements |

#### Strategy #1: Implement Core Curriculum & Use of Student Data

| SQIS P1 | - Core Curriculum & Instructional Materials |
| SQIS P3 | - CCSS & Core Curriculum Professional Develop. (incl. 36 hr Plan) |
| V2025 | - Laptops for Educators |
| V2025 | - Student Technology/ Hardware (Tablets, Laptops, Desktops) |
| | - Interim/ Formative Assessment System |
| | - Smarter Balanced Assessments |

#### Strategy #2: Response to Instruction and Intervention

- Academic (Tiers 2 & 3)
- Behavioral (Tiers 1, 2, & 3)

**Board of Ed**

- Safe and Supportive Schools
- Peer Resources
- 504 Services

**Board of Ed**

- Special Education & Inclusive Practices
- Out of School Time

#### Strat. #3/ SQIS P1: College and Career Readiness

**Board of Ed**

- Secondary Support (A-G)

**V2025**

- Secondary Pathways (i.e. CTE)
- 21st Century High School Redesign
## FY 2014-2015 Proposed Budget for ORG: 150 - PUPIL SERVICES

- Enforce school attendance by having a Dropout Prevention Office that reclaims truant and chronically absent students, implements the Student Attendance Review Board, issues exemptions, and coordinates the efforts of the Pupil Maintenance and Motivation grants (SB 65).
- Implement the **Peer Resource Program**.
- Maintain a Transcript Office and a Records Office that responds to subpoenas and issues work permits.
- Maintain a **Community Home Base Schooling Program for K-5**.
- Provide a **Counseling Center** for suspended students.
- Facilitate the use of the SST process.
- Approve and monitor Section 504 Plans.
- Provide monthly staff development to school advisors, assistant principals, deans, and counselors.
- Provide attendance liaisons and retired teachers at the schools to help monitor student attendance.
- Publish and distribute annual documents such as the **Student Parent/Guardian Handbook and High School-College-Career Handbook**.
- Coordinate interagency meetings regarding the most at-risk students.
- Coordinate and facilitate the goals of the **District Discipline Task Force**.
- Meet monthly with the legal advocates & SFPD regarding Safe School Resolution.

### 01 - GENERAL FUND

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<td>FTE</td>
<td>Budget</td>
<td>FTE</td>
<td>(Budget $)</td>
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<tbody>
<tr>
<td></td>
<td>Budget</td>
<td>FTE</td>
<td>Budget</td>
<td>FTE</td>
<td>(Budget $)</td>
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Appendix P: Iteration of Coherence Mapping Exercise

![Diagram](image-url)

- **Strategy 1**: Language Arts, Math
- **Strategy 2**: RTI
- **School Quality Improvement Index**
  - Academic
  - Social-Emotional
  - Culture/Climate
    - Safe and Supportive Schools
Appendix Q: Iteration of Coherence Mapping Exercise

The Index

- Academic
- Strategy 1: ELA
- Math
- SBAC...autotur data
- Strategy 2: R+Co
- Strategy 3: Grade Rate AS Readiness
- SEL
- CultureClimate
- Strategy 67

← Strategy 2: R+Co
- Strategy 3: Grade Rate AS Readiness
- Strategy 5: H0
- Strategy 4: MTSSS

→
Appendix R: Iteration of Coherence Mapping Exercise
Rules of the Road

Results-Oriented Cycle of Inquiry
Equity: Differentiated Supports

Key Drivers

Challenging curriculum and engaging instruction
Student-centered learning climate
College and career readiness
Parent-School-Community Ties

Accelerators

Talent
Technology
Innovation

Local Control and Accountability Plan
State accountability
Priorities: Student Achievement, Culture & Climate, Family Engagement
Local Control Funding Formula (LCFF) based on student factors

School Quality Improvement Index
Federal accountability as part of CORE waiver
Domains: Academic, Social/Emotional, Culture & Climate
Eliminate disparity and disproportionality

Proven strategies for classrooms, schools and central offices
Guide to continuous improvement

Vision 2025
Graduate Profile
10 Big Shifts
For SFUSD, Performance Management relies on many existing initiatives coming together and creation of critical new systems.
Appendix U: Impact Learning Initiative: Progress to Date (October)

Where we have come

Advisory Board Learn-Ins
Impact Learning Advisory Group Charter & Strategy 2: Overarching Goals
Strategy 2 Leads: Development of Work Plan
Strategy 2: Implementation Team Launch
IMPACT LEARNING ADVISORY GROUP AGENDA

November 10, 2014 :: 9:30 – 11:30am

Meeting Outcomes:
1) Review Impact Learning Initiative Objectives & Outcomes
2) Discuss Approach to Strategy 2: Academic RTI & Strategy 5: Highly Qualified Teachers, Leaders, and Staff

Welcome:
Strategy 2: Academic RTI ILIT Team Leads

Thank you:
Strategy 2: Safe and Support Schools ILIT Team Leads

Items for Discussion & Decision Points

1. Review Advisory Group Objectives & Expectations

Advisory Group Objectives & Expectations
∗ Engage in professional learning and collaborative work in cross-departmental teams
∗ Develop a deeper understanding of our collective work towards shared goals and gain greater clarity of leadership roles
∗ Provide leadership for the implementation of SFUSD’s strategic plan Impact Learning. Impact Lives.
∗ Actively participate in Advisory Group meetings to progress monitor and champion our collective work and ensure completion of deliverables
∗ Set the agendas, lead, and facilitate Impact Learning Implementation Team work sessions
∗ Advise and offer recommendations to sponsoring Deputy Superintendent, especially in issues related to organizational capacity-building, strategic resource management, programmatic changes, or rationale for structural changes

Impact Learning Initiative Outcomes & Deliverables
∗ Develop concrete implementation plans, with defined measures and outcomes, for the Six Strategies for Success
∗ Develop and utilize tools to gauge the implementation of the Strategies in Action at the classroom and school level
∗ Based on this work, begin to draft and prepare for publishing, a more refined and nuanced 2015-2017 strategic plan

Q1. Given these outcomes and deliverables, are these still the right objectives? Deletions, Omissions, Additions?
Appendix W: Impact Learning Initiative: End Product (December)

IMPACT LEARNING ADVISORY GROUP AGENDA

December 8, 2014 :: 2:00 – 5:00pm

“Every time a team gathers, there is an opportunity for individuals to bring their deepest selves and to create something together that they cannot create alone.”

Meeting Outcome:

• Discuss Impact Learning Implementation Teams’ Progress and Product

Where we’re headed:
Impact Learning Initiative Outcomes & Deliverables

• Develop concrete implementation plans, with defined measures and outcomes, for the Six Strategies for Success
• Develop and utilize tools to gauge the implementation of the Strategies in Action at the classroom and school level
• Based on this work, begin to draft and prepare for publishing, a more refined and nuanced 2015-2017 strategic plan

Progress Updates from Strategy Teams:

• Strategy 2: Safe & Supportive Schools
• Strategy 1: Common Core (+Academic RTI)
• Strategy 5: Effective Teachers, Leaders, and Staff
• Strategy 6: Family Engagement Standards
• Strategy 3: College and Career Readiness (informal update)
• Strategy 4: MTSS (informal update)

Reflect on each Strategy Team’s Progress: What resonates...? What questions...? What suggestions...?
Appendix X: HBS Framework: Analyzing Work Groups

Exhibit 1: Framework for Analyzing Work Groups

- **DESIGN FACTORS**
  - **CONTEXT**
    - Organization's Strategy
    - Organization History
    - Physical Setting
    - Customers, Suppliers and Competitors
    - Labor Market
    - Financial Markets
    - Political, Legal and Cultural Systems
  - **GROUP COMPOSITION**
    - Demographics
    - Competencies
    - Interests
    - Working Styles
    - Values
  - **TASK DESIGN**
    - Required Activities
    - Required Interactions
    - Interdependencies
    - Variety and Scope
    - Significance
    - Autonomy
  - **FORMAL ORGANIZATION**
    - Structure
    - Systems
    - Staffing
- **GROUP CULTURE**
  - Emergent Activities
  - Emergent Interactions
  - Shared Values
  - Norms
  - Roles and Status
  - Subgroups
  - Rituals, Myths and Shared Language
  - Shared Conventions
- **EFFECTIVENESS**
  - Performance
  - Member Well-Being and Development
  - Shared Capacity to Adapt and Learn

This document is authorized for use only in A608 Leadership, Entrepreneurship and Learning by Monica Higgins from August 2012 to February 2013.
# 2014-15 SFUSD Leadership Structures

<table>
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<tr>
<th>MEETING TITLE &amp; LOCATION</th>
<th>DESCRIPTION</th>
<th>MEETING CADENCE</th>
<th>MEMBERSHIP</th>
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| Superintendent/ Deputy Meeting  
  Supt’s Office | • Provides a critical friends group and counsel to our Superintendent; opportunity for Deputies to share and align on cross-division priorities  
  • Sets agenda for Superintendent’s Leadership Team | Every Wednesday from 8:30-9:30a | Superintendent  
  Deputy Supt IIJSJ  
  Deputy Supt P&O |
| Executive Team  
  Supt’s Conf/Room | • Defines the district’s strategic focus, makes decisions on critical organizational objectives | Every Wednesday from 9:30-11:30a | Superintendent  
  Deputy Supt IIJSJ  
  Deputy Supt P&O  
  General Counsel  
  Chief of Staff  
  Chief Comms Officer  
  Chief of HR |
| Superintendent’s Monthly Check-In  
  Breyer Board Room | • First thirty minutes dedicated to Superintendent’s sharing and orienting  
  • The rest of the agenda will be dedicated to sharing progress on key organizational initiatives, aligning on upcoming work, and providing space departments to present information and get feedback on plans before they go live | 4th Tuesdays, 3:00-5:00p | Department Leaders and School Support Team Members from P&O + IIJSJ |
| Impact Learning Implementation Teams  
  Implementation Team – Location TBD  
  Advisory Board – Supt’s Conference Room | • The broad goal for the Impact Learning Implementation Teams is to deepen cross-departmental working relationships and coherence and develop the fall toolkit for Impact Learning: Impact Lives, ultimately utilizing it to determine resource allocation for 15-16 and for the 2015-17 Strategic Plan.  
  • After assessment cycles, time will be extended to reflect and go through the ROCI cycle.  
  • The general agenda and outline for the year will be constructed by the Impact Learning Advisory Board; individual work time agendas will be set by co-conveners and neutral facilitator. | ILT Implementation Teams 1st Tuesdays from 12-4p  
  Extended time: December 9th, February 3rd and May 5th  
  Advisory Board Meetings 2nd Tuesdays from 2-5:00p | ILT groups will be:  
  • Language Arts  
  • Mathematics  
  • Academic and Behavioral Rtu/ Safe & Supportive Schools  
  • College & Career Readiness  
  • Talent & Human Capital  
  • MTSS  
  • Family Engagement and Community Partnerships |
COLLABORATIVE IMPLEMENTATION TEAM FAQ
(renamed Impact Learning Advisory Group)

What do we mean by this term? A Collaborative Implementation Team is a cross-departmental group of leaders who will shepherd the implementation of each of the Six Strategies for Success. These teams will meet at least monthly, will have a leader and a facilitator, and will be required to report out progress, successes, challenges and barriers to the broader division on a regular performance cycle.

How are these teams different than current department implementation teams? These teams will have representatives from departments and teams across the organization as opposed to individual department implementation teams, with the explicit intent that each team has on it the perspective of a broader cross section of stakeholders to guide the strategic and operational decision making.

What will Collaborative Implementation Teams do? In addition to setting the explicit annual implementation goals for each of the Six Strategies, these teams will make decisions about the implementation strategy, progress monitor throughout the year, and report out progress and barriers to the broader division.

What are Collaborative Implementation Teams accountable for? At the highest level, this team is responsible for ensuring that the implementation of each of the Six Strategies for Success is coherent and that there is a common thread of intentionality about how we use our resources and personnel to reach our implementation goals. They will also be accountable for sharing progress toward expectations with the broader IISJ Division and Department Leadership four times per year.

How will Collaborative Implementation Teams make decisions? Each implementation team will use a clear and transparent decision-making process in which each person on the team has equal voice in decisions related to the strategy. Teams will decide on their decision-making process guided by some decisions making strategies to be shared.

How will each Collaborative Implementation Team’s work be communicated to the rest of the organization? Each person who sits on a collaborative implementation team will have the responsibility of communicating the work of the team back to her/his department or division and for bringing to the Collaborative Implementation Team the input and feedback from her/his department. If the intention is for each team to have representation, this feedback loop is essential.

How will they maintain focus and momentum? Facilitated teams will meet at least monthly during an existing structure that will be repurposed to support implementation work. All teams will agree upon and actively use working agreements. Teams will regularly take up dilemmas emerging from their implementation plan.

What elements comprise a Collaborative Implementation Plan?

1. Shared, Agreed Upon Implementation Goals: What will change as a result of our work this year? Some examples are: Student outcomes, Student experience, Teacher practice, Leadership, Integration of technology
2. Progress Monitoring: How will you monitor progress? What tools will you use? How often and in what forums will a cross-functional group gather to progress monitor and make adjustments to strategy?
3. Core Strategies & Key Leverage Points: What are the critical moves that will lead to the articulated goals/practice shifts? How will you leverage/use network, collaborative time, site-level support, professional learning and direct coaching?
4. Roles and Responsibilities: Which Division/Dpartment/Individual is responsible for which component(s) of the strategy? What roles do the other departments involved play? How are they informed? Do they have to agree?
5. Support Structures & Rules of Engagement: How are decisions going to be made on changes to strategy? What meetings, coaching, tools, etc. will be required to push the work forward?

What is the work from here forward? We plan to use the next two meetings to draft collaborative implementation plans and to solicit feedback on the plans from each other and stakeholders. Teams will consider how to communicate to site leaders and central leaders at the AI about the implementation plans. The ELT will carefully consider the existing collaboration/meeting structures and consider how to prioritize the work of the collaborative implementation teams as they finalize the scope and sequence of all meetings next year.