Dripstone Columns: A Strategy Development Model for Strategic Renewal for the National Board for Professional Teaching Standards

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Dripstone Columns:
A Strategy Development Model for Strategic Renewal
for the National Board for Professional Teaching Standards

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

Submitted by
Kristen A. Wong Callisto

To Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership

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Dedication

I dedicate this capstone to all children, but especially those closest to my heart: the ones with disabilities, the ones on the margin, the ones who are told they cannot. I see myself in them and for them, I do this work.

I dedicate this capstone to their parents and families, who love and believe in their children, sometimes in the face of incredible adversity. I see my parents in them and for them, I do this work.

I dedicate this capstone to the teachers who celebrate every child and make their classrooms loving and welcoming learning environments for all learners. I see myself in them and for them, I do this work.
Acknowledgements

I am inordinately fortunate to be surrounded by many outstanding individuals who have contributed so much to this capstone and my leadership journey. I find myself inadequate to the task of expressing my gratitude, but this is my attempt. Mahalo nui loa!

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Kathy Boudett: You are an advisor above and beyond. Somehow you embodied the role of a partner and coach. Your thoughtful and enthusiastic support has been invaluable. Thank you for helping me own my work.

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Cohort 4
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National Board Staff
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To my Hawai‘i crew
My Hawai‘i ‘ohana: colleagues, students, and friends – I would not be on this journey if it was not for the lessons you taught me. Hawai‘i will always be the home of my heart. This is for Ilima Intermediate, Mt. View Elementary, and Kea‘au High School. Hawai‘i, no ka‘oi!

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I also extend my love to the: Callistos, Galloways, Jenkins, Kellys, Ohls, Parsons…Proud to become Dr. Wong Callisto for Billy and Antonette Callisto.

Chris
Marriage vows ought to include not only “in sickness and in health” but also “through graduate school and residency.” You have been selfless and supportive so that I could dedicate so much of myself to this doctoral journey. What an adventure we have had traipsing across the country! There is no one else in the world I would want by my side through moments like this.

How do I love thee? Still too many ways to count. No keia la, no keia po, a mau loa.
Abstract

The National Board for Professional Teaching Standards was established in 1987 and is an independent, non-profit, and non-governmental organization that works to advance accomplished teaching. At the time of my residency, the National Board was in the midst of several significant changes: a major re-design of its board certification assessment, the launch of ATLAS – an online case library of accomplished teaching, the transition of a new president and CEO, and the wind-down of several large grant-funded projects. As it prepared to enter its 30th year, the National Board sought strategic renewal to more effectively scale accomplished teaching.

At its surface, my residency was about articulating a model of strategy development for the National Board and creating the conditions for an emergent strategy development process – a bottom-up process that leverages the expertise, leadership and entrepreneurial spirit of staff members to develop the National Board’s next-generation strategy for scale. However, my capstone also speaks to broader themes of change management for a mature organization, leadership through transition, and of course, developing organizational conditions and culture to support current needs.

I treat the development of my strategic project as a case study for how an organization in the ambiguity of transition can navigate forward towards strategic clarity. This capstone outlines the three stages of my strategic project where I refine a model of strategy development that calls out the need for top-down strategic guidance coupled with an emergent strategy development process. I rejected the binary between top-down or bottom-up and sought to articulate a top-to-bottom model. The metaphor of dripstone columns, which are formed when stalactites and stalagmites grow together symbolize the top-to-bottom model of strategy development I proposed.

To analyze the strategic project, I use an adaptive leadership framework. This framework allowed me to examine the way in which transition and change affected the National Board, its leadership, and its staff members. I conclude that strategy development must not be lost in the turmoil of transition. The discipline to step back from the demands of daily work and effectively communicate strategic direction and priorities provides the steady leadership that is critically needed for an emergent strategy development process and especially in times of change.
Introduction

The National Board for Professional Teaching Standards (a.k.a. NBPTS or the National Board) was established in 1987 as an independent, non-profit, and non-governmental organization with the purpose of advancing accomplished teaching to all classrooms. The genesis was a 1986 Carnegie Forum on Education and the Economy task force report: *A Nation Prepared: Teachers for the 21st Century* written in response to *A Nation at Risk* with recommendations to strengthen standards for teaching and to professionalize the teacher workforce. These recommendations are echoed explicitly in the mission of the National Board:

To advance the quality of teaching and learning by:

- Maintaining high and rigorous standards for what accomplished teachers should know and be able to do;

- Providing a national voluntary system certifying teachers who meet these standards;


The National Board’s theory of action has been that a rigorous board certification process aligned to professional teaching standards would generate an endorsed corps of educators who would deliver high-quality instruction to all students and could advocate for the profession through leadership in instruction, schools, and policy.

In the early years, the National Board’s work mobilized first to establish standards of teaching and then develop the board certification process based on those teaching standards. After careful design and planning, the first teachers
became board certified in 1995. The next stage for the organization was growing its numbers of board certified teachers (a.k.a. NBCTs). The original strategy for bringing board certification to scale has been termed the “early adopters strategy” and focused on these actions:

- Financial support for certification fees
- Support for candidates to progress through the process
- Compensation stipends for those who achieve
- Recognition through ceremonies and other events (Doctor, 2015a).

Resulting growth of board certification was slow in the 1990s, but grew to an average of over 8,000 new NBCTs a year in the 2000s. Currently, approximately 112,000 teachers have attained board certification in a profession of 3.1 million teachers, making up 3% of the teaching workforce. Appendix A graphs the growth of board certified teachers over time.

I entered the National Board in a time of transition for the organization. During my residency, the National Board sought renewal of its strategy to scale. A variety of factors had precipitated this strategy reset. One factor was the realization that, after 28 years, board certification for teachers had not yet scaled to become a norm in the education field. Furthermore, examination of growth rates of NBCTs revealed that the early adopters strategy may have captured a segment of early adopters (i.e. 3% of educators) but growth was slowing in the second decade of the 2000s. In fact, recent calculations estimated that at the current rate of growth, it would take almost two centuries until half of the teaching population was board certified, as is shown in Figure 1.
Another major factor was the state and federal fiscal retrenchment that followed the Great Recession of 2008 (NBPTS, n.d., Strategic Plan). This retrenchment led to elimination of federal subsidies for National Board work in 2011 and increasingly contributes to an ongoing threat of reduction or elimination of state-level financial support for the National Board. The fragile nature of federal and state funding highlighted that the early adopters strategy’s reliance on financial support for certification fees and compensation stipends was not viable. Related, there was an increasing awareness that the National Board often focused on maintaining strategic beachheads in states (i.e. protecting early adopters strategy policies) at a cost of expansion and advancement of their vision.

Finally, the National Board had presumed that scaling board certification was a sufficient proxy for professionalization but it now recognized that board certification was only one part of a broader effort to professionalize education. It
was problematic that board certification and candidate support programs had become disconnected from other efforts to elevate and transform teaching (Doctor, 2016). Additionally, the part of the mission that spoke of mobilizing NBCTs to advocate and lead the profession had not yet been realized, leading to NBCTs being described as “all dressed up with no where to go” (Doctor, 2016). Taken together, these were powerful factors that triggered key members of the leadership to recognize the need for strategic renewal.

**The Strategic Project**

At its surface, my strategic project was the articulation of a model for strategy development and the establishment of the conditions for that strategy development model to be successful, but my capstone also speaks to broader themes of change management for a mature organization, leadership through transition, and of course, developing organizational conditions and culture to support current needs. These themes were apparent from my first day of residency. The National Board had just lost a strong and visionary president and CEO to a long illness, and the interim president and CEO was named only a few weeks prior to my arrival. Additionally, the National Board’s core work – the board certification process – was in the middle of a major redesign. The organization also had recently launched a new resource, ATLAS¹, and was trying to introduce this unique online case library to the education sector. Several large grant-funded projects were winding down and the National Board was positioning itself to take up new work. Thus, the National Board was re-casting

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¹ ATLAS is an online case library that utilizes the National Board’s bank of submission videos and materials from NBCTs.
its strategy for scale while changing and expanding its resources and in the midst of a significant leadership transition.

Within this context of transition, my residency focused on helping the National Board with one specific transition: the ongoing shift from the early adopters strategy towards development of a next-generation strategy$^2$ to scale accomplished teaching. I understood that while a strategic renewal was necessary, it was also a challenging undertaking because it was a move from the known and familiar into a space that is unknown and uncertain. Forward movement does not always ensure clarity, as Weick (2015) alludes to when he writes that “behind ambiguity lies more ambiguity, not clarity” (p. 117). Faced with uncertainty, organizations can either seek solace in the familiar or “act within ambiguity” (Weick, 2015, p. 117). As I undertook the work of strategy development that pulled people towards uncertainty and ambiguity, I understood that my strategic project would attempt to answer the question: In this time of rapid, iterative change, how can the National Board, its leadership, and its staff develop a next-generation strategy for scale that will allow it to be nimble and adaptive in order to thrive?

There were several activities that I undertook towards the aim of strategy development, but for this capstone I have chosen to focus particularly on a series of monthly strategy sessions that I planned and led. In the beginning, I saw the meetings as my strategic project, but in truth they were just a primary vehicle to uncover the broader work that I needed to do. By December, I began to articulate a strategy development model that combined top-down strategic guidance with

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$^2$ The language of “next-generation” was my own terminology to signal that any new strategy was progeny of our old.
a bottom-up strategy development process. This top-to-bottom strategy development model guided the construction of a strategic planning and learning system for outreach work. The creation of such a system defined a space where I could foster a team culture that nurtured the ability to adapt and learn quickly through change and uncertainty. I also felt that adaptive and learning behaviors were essential for my proposed strategy development model. The capstone documents the progression of my work as I developed an increasingly sophisticated conception of my strategic project.

Unlike Athena, emerging fully developed from Zeus’ head, my strategic project evolved over three stages that I describe in the project description section. A unique element of my strategic project is that I did not begin to define it until December. Rather than beginning with a preconceived locus of space to operate within, I was allowed to explore the full realm of possibilities and ultimately define strategic work that best aligned with my strengths and the National Board’s needs. This particular process of arriving at a strategic project was not without its challenges. The organization of my work into neat stages may mask the challenges of the lived experience. In truth, the development of my strategic project was not steady and smooth, but as often is the case in practice, defined by vicissitude. However, the stages also demonstrate how the practice of ongoing reflection and analysis permits net progress forward. As such, my residency itself is a unique case study for operating in a space of change, uncertainty, and ambiguity.
Review of Knowledge for Action

The National Board for Professional Teaching Standards

The National Board is a relatively small organization, with 60 employees and an operating budget of $30 million. The organization is informally divided into four divisions, headed by one or more members of the senior leadership team. These divisions are:

- Finance
- Standards, Assessment, & Innovation
- Outreach & Engagement
- Strategy & Policy

The National Board’s senior leadership team has eight members:

- President & CEO
- Chief Financial Officer
- Senior Vice-President of Strategy & Policy
- Senior Vice-President of Standards & Assessment
- Senior Vice-President of Outreach & Engagement
- Vice-President of New Products
- Vice-President of Assessment
- Vice-President of Outreach

The senior leadership team was relatively nascent as the interim president and CEO had joined the organization as the Executive Vice-President in December 2014. In general, this team has historically been changeable, undergoing a composition change every year since at least 2011 (L. Stooksberry, personal communication, February 3, 2016).

The National Board offers a suite of nine different resources, with the core resources being its standards and board certification process. The National Board has standards in 25 certificate areas that cover 16 different subjects and four developmental levels. Although the National Board certification process has
undergone at least two major revisions, it has always required submission and evaluation of a comprehensive portfolio where teachers demonstrate content knowledge mastery, reflection on student work, analysis of teaching practice, and documented impact and accomplishments as a teaching professional (NBPTS, n.d., About Certification). Traditionally completed in a year, the National Board’s certification process has always been rigorous and generally about 40-50% of candidates will achieve board certification (Goldhaber, Perry, & Anthony, 2004). Additionally, board certification has required a certification fee that has historically been a substantial sum for many teachers, costing up to $2,500 at its highest (Brown & Wong Callisto, 2015).

As “the most prominent contemporary effort to professionalize teaching” (Anagnostopoulos, Sykes, McCrory, Cannata, & Frank, 2010, p. 337), the National Board has enjoyed a wide range of supports including financial support from district, state, and federal levels. Goldhaber, Perry, and Anthony (2004) wrote that, through 2003, the National Board had received over $300 million from federal and non-federal sources. Much of the aforementioned financial support subsidized the financial cost of certification for candidates and provided incentives through compensation stipends for those who achieve certification, financial strategies that are two hallmarks of the early adopters strategy. The success of the early adopters strategy is best seen in North Carolina, a state with some of the most long-standing and supportive policies for board certification including certification fee subsidization and a stipend for achievement. With over 20,000 teachers achieving board certification, North Carolina has produced 19% of all NBCTs. While North Carolina is exceptional, examination of state policies illustrates that states with policies that offer salary increases to NBCTs
have significantly higher numbers of teachers applying and becoming certified (NBPTS, 2011).

However, there are two main concerns with the financial supports: money as an extrinsic motivator and sustainability. Although the compensation stipends for those who achieve certification are a recognition of expertise, for many, “certification came to signify simply the drive for money” (Anagnostopoulos et al., 2004, p. 353). While some educators recognize that the board certification process is about professional growth and are driven by the intrinsic motivation to improve their practice, others openly express that they are motivated by the monetary incentive. As the National Board focuses on scaling accomplished teaching, the use of financial incentives is a complicated legacy, particularly as “evidence indicates clearly that strategies that focus primarily on the use of extrinsic rewards do, indeed, run a serious risk of diminishing rather than promoting intrinsic motivation” (Desi, Ryan, & Koestner, 1999, p. 659). The second concern highlights the questionable sustainability of financial support for the early adopters strategy. Simply put, as board certification scales, the cost to fund the financial supports will rise commensurably, and given the resource-limited conditions of many school districts, this is not a viable policy in the long-term. As mentioned in the introduction, financial support for National Board is increasingly under threat, but this threat could catalyze the design of new strategies for scale that are more fiscally sustainable.

Unfortunately, another unintended consequence of the early adopters strategy has been the perception of board certification as exclusive. At some point, board certification became perceived as an achievement that marked elite status (Anagnostopoulos et al., 2010). In a field that values egalitarian ethos
(Lortie, 1975), differentiation amongst teachers is generally unwelcome. In some places, there is almost a knee-jerk negative reaction to board certification and NBCTs. For example, at an event the National Board co-produced with the US Department of Education, an educator wrote on a feedback comment card, “I notice you are looking solely for NBCTs – what if an amazing teacher has yet to drink the kool-aid?” (Anonymous, personal communication, July 24, 2015). Thus, in addition to strategy renewal, the National Board also requires significant rebranding to mitigate the perception of board certification as exclusive and elite for policy makers, school leaders, and teachers in order to scale to the majority of educators.

Aware of some of the faults of the early adopters strategy, the National Board’s 2013-2017 strategic plan outlined two strategic goals:

1. Strategic Goal I: Build educator effectiveness across the career continuum
2. Strategic Goal II: Promote a vision of accomplished teaching that elevates the profession (NBPTS, n.d., Strategic Plan)

While these goals had been operationalized in the redesign of the assessment, launch of ATLAS, and growing advocacy of a teacher career continuum by the National Board, I observed that at the staff level there was still confusion about what these strategic goals meant for their daily work. Usage of the strategic goals and the attendant language was inconsistent across the organization and led to varied levels of familiarity and understanding. Thus, it is understandable that the strategy in use I observed at the National Board was a mix of the early adopters strategy and some newer ideas of the teacher continuum.
Scaling

The importance of scaling accomplished teaching is deeply embedded in the National Board’s vision for the education profession. To understand more about going to scale, I began by asking, “How do successful products become popular?” My own understanding was that scale starts with a great product and then replicates at rapidly growing volume. I believed that once this great product could be reproduced consistently at increasing volume then a combination of marketing efforts and some other intangibles led to it going to scale, or becoming widespread. From reading Gladwell’s *Tipping Point*, I shared a popular belief that scaling was a matter of growing critical mass until the aforementioned “tipping point” threshold was crossed, after which momentum shifted and widespread diffusion rapidly occurred.3 In my reading, I discovered that my thinking on scale was likely also unconsciously influenced by Rogers’ well-known diffusion of innovation curve:

3 It is clear that others at the National Board shared a similar idea of how scaling worked. For example, in an interview with a vice-president, she said, “I believe in the theory of a ‘tipping point,’” referencing a book study the organization had hosted several years ago (N. Schwartz, personal communication, November 17, 2015).
Each segment of this curve (e.g. innovators, early adopters) represents a “unique psychographic profile – a combination of psychology and demographics that makes its marketing responses different from those of the other groups” (Moore, 2014, p. 15). Indeed, Rogers’ innovation curve has become so popular that it is little surprise the National Board used his language in calling their initial approach to scale the “early adopters strategy.”

Understanding the principles of diffusion in scale, I still wondered why scaling is so challenging. Although the common myth is that upwards of 80% of products fail, empirical studies find the number closer to 40%, which still suggests the difficulty of scaling (Castellion & Markham, 2012, p. 979; Christensen, 2003, p. 73). More critically for my residency was the unanswered question: why hadn’t board certification for teachers gone to scale?

In reading about innovation, I encountered Moore’s (2014) book, Crossing the Chasm: Marketing and Selling Disruptive Products to Mainstream Customers, in which he introduces a “chasm” that exists between early adopters and early majority (p. 25). My assumption with scale was that the tipping momentum between early adopters and the majority was a relatively smooth transition, alluding to what Moore refers to as a “bandwagon effect” where the momentum of increasing sales encourages the next group to buy (p. 18). Moore examined the adoption of technology innovations, trying to understand the variance of success between products like Segways and iPads, and discovered that growth stalled between psychographic groups. The reality of scale is not simply a matter of growing mass until reaching a tipping point, but rather fraught with several opportunities to lose momentum.
Moore revised the curve to look like this:

![Diagram of Moore's "Chasm" (Poulos, 2015)](image)

Figure 3: Moore's "Chasm" (Poulos, 2015)

Each of the gaps represent opportunity for growth to be stalled, but the gap between the early adopters and the early majority represents “the most formidable and unforgiving transition” and thus warrants a special name, “the chasm” (p. 25). Crossing this chasm first demands understanding the fundamental differences between customer segments – the idea being that if an organization understands what its customers want, they can provide it.

Understanding what customers want reminded me of the Jobs to be Done theory that I first learned in Building and Sustaining a Successful Enterprise with Clay Christensen and then reinforced in the Harvard Business School’s HBX online Disruptive Strategy course that I completed in the fall of 2015.

The cornerstone of the Jobs to Be Done theory (a.k.a. JTBD) is that customers hire products and services to do a job, a job being defined as, “a fundamental problem a customer needs to resolve in a given situation” (Christensen, 2010, p. 1-2). A business that is able to identify a customer’s problem and improve the experience of buying and using the product is much
more likely to have their product popularized in a way that is challenging for competitors to replicate. IKEA is a great example because there are many other places where people could buy furniture. If the job for IKEA’s customers is “I need to furnish my house today,” IKEA has made it easy to select furniture, pick it up, and assemble it in a day (Christensen, 2010, p. 6). The logic of the JTBD theory seems intuitive, so why do so many companies ignore it? Christensen theorizes it is because business orientation is towards the customers as units of analysis rather than the circumstances that drive the customers to buy (2003, p. 75).

Until now, board certification has fulfilled a job for thousands of teachers who were early adopters but has not crossed the chasm to become the norm in education. Combining the lessons learned from Moore’s *Crossing the Chasm* and the JTBD theory, I believe that the National Board has to answer three key strategic questions:

1. Who are the National Board’s customers?

The early adopters strategy focused on individual teachers, but recently the idea of teachers as the customer base has been questioned because it reinforced a narrative that board certification was an independent, individual effort. A core purpose of the National Board is to professionalize education with educators leading their field so that every child is taught by an accomplished teacher – an ambition for a collective, not individuals. Consequently, the National Board has examined a more systemic approach of looking at schools or districts as the customer base. The systemic approach also considers conceptualizing teachers as a group or profession. While the National Board has become more sophisticated in how it views its potential customers, its new understanding produces
complexities that a strategy renewal has to address. For example, should the National Board prioritize engaging one segment of customers over the other?

2. What are the jobs to be done for the customer base? Which of these jobs can the National Board can do?

Defining the jobs to be done is important, but also codependent on the customer base. Therefore, these questions have to be answered in sequential order.

The second question posed about which of the jobs the National Board can do is significant because any work in education is complicated by our decentralized education system in the US. The National Board is a small non-profit that has extraordinary vision, but also limited capacity, and must make strategic choices to choose work where it can have a significant impact within the means of its operational resources.

3. How will the National Board do that job for their customers? (i.e. What is the product/service offering and the strategy?)

Earlier I mentioned that the National Board staff does not always seem certain what it is scaling: board certification or accomplished teaching. While the two are not unrelated, they are not the same thing. An unintended consequence of the early adopters strategy was that the focus unintentionally became scaling board certification for scale’s sake. The strategic goals in the 2013-2017 plan suggest that the National Board has recast its focus to be on scaling accomplished teaching. The concept of scaling accomplished teaching is much more complex than scaling board certification, and I am not sure this strategic priority is clear to staff members, the National Board’s partners, and educators in the field. Additionally, the relationship of board certification and scaling accomplished teaching also requires clarification. The senior leadership team of the National Board needs to
communicate what scaling accomplished teaching means for its staff so that everyone in the organization can align their actions accordingly. I also believe that if the National Board can communicate the next-generation strategy for scale effectively to their partners and development prospects, then they will continue to secure the support they need to do their work.

**Strategy Development**

Given a strategic project to help the National Board renew its strategy for scale, one of the first fundamental questions to answer is, what is strategy? Childress (2004) wrote that “strategy is the set of actions an organization chooses to pursue in order to achieve its objectives” (p. 1). Curtis & City (2009) point out that although strategy can be “suggestive of something powerful and deliberate,” it “can also be the catchphrase we attach to a multitude of well-intentioned but disjointed plans and initiatives.” So my next logical question was, what does a good strategy look like? Childress (2004) describes how a well-crafted strategy:

- Connects to a purpose
- Provides focus
- Guides choices
- Illuminates relationships
- Defines measurement parameters
- Addresses the external environment
- Allows for adaptation (p. 2)

Taking the context in which I found myself into consideration, I then wondered: what would be the best way for the National Board to develop a well-crafted, new strategy for scale in a manner that would allow the organization to be nimble and adaptive in the face of ongoing changes? The need for a strategic
renewal seemed unambiguous due to the data stating that, if the National Board continued to just execute its current strategy, it would get to scale...in a couple hundred years. Although the National Board was experiencing significant changes and transition, I believed that these changes and transitions presented the organization with a ripe opportunity to focus on strategy.

The authors of *The Innovator’s Solution*, Christensen and Raynor (2003), and *Your Strategy Needs a Strategy*, Reeves, Haanaes, and Sinha (2015), argue that in the quest for the best strategy many managers overlook a critical element, the process of strategy development. Companies should use a robust process of strategy development that aligns strategic approaches to their organization’s context (Reeves, Haanaes, & Sinha, 2015). To be clear, I was less interested in strategy planning for the National Board as I was in strategy development. Curtis and City (2009) highlight several key differences between strategic planning and strategy development, including the static nature of strategic planning versus the more dynamic process of strategy development (p. 117). Given the need of the National Board to be adaptive to its context, articulation of a model for strategy development was one outcome I worked towards for my strategic project. The argument to focus on the strategy development *process* rather than the next-generation strategy itself was a key insight that I took away from these readings.

Christensen and Raynor (2003) describe two concurrent processes through which strategy comes to be defined: deliberate and emergent. Managers need to understand which type of process to lean on more heavily depending on the organization’s situation.
Figure 4 below illustrates the process by which strategy is defined and implemented:

Often we think of strategy as a cerebral exercise conducted by leaders of an organization, and this mental model of strategy speaks to deliberate strategy development (Reeves, Haanaes, & Sinha, 2015; Curtis & City, 2009; Christensen & Raynor, 2003). The deliberate strategy process is conscious and analytical, implemented top-down (Christensen & Raynor, 2003). Deliberate strategy processes are most effective when a winning strategy is known and the focus is on improving execution (HBX, 2015). In contrast, the emergent strategy “bubbles up […] as the cumulative effect of day-to-day prioritization and investment decisions made by middle managers [and] staff” (Christensen & Raynor, 2003, p. 215). Emergent processes are important when the organization is an adaptive situation and it is not clear what the right strategy should be (HBX, 2015).
Additionally, the developmental phase an organization is in also dictates what strategy development process is best. In the HBX course, Disruptive Strategy, Christensen (2015) outlined three main phases: Market-Creating, Sustaining, and Efficiency Phases. In the Market-Creating phase the profitable strategy is not yet known, so he suggests cultivating an emergent strategy development process. In the Sustaining and Efficiency Phases, he suggests that a deliberate strategy development process is needed.

Analyzing the recent context that the National Board was situated in, an emergent strategy development process seemed most appropriate. As outlined in the introduction, the National Board was in a tremendously fluctuating environment with recent changes in its business model, resources, and leadership. Additionally, although the National Board had existed for nearly 30 years, a profitable strategy for scaling to the majority of educators had not yet been determined. These two characteristics of the National Board’s context matched the conditions outlined for when to cultivate an emergent strategy development process.

The development of strategy occurs in the context of its execution. As one can see in Figure 4, the implementation of strategy is closely tied to the way an organization allocates its resources. One of the key resources I was most interested in examining at the National Board was the use of human capital. Christensen’s recommendation for using an emergent strategy development process is to ensure that staff are empowered to surface new ideas (HBX, 2015). This counsel makes sense considering that emergent strategies are dependent on the entrepreneurial actions of middle managers. However, the reliance on an emergent strategy process does not mean that top management is absent from
strategy development. Top management must still establish strategic priorities and provide the guardrails for staff to operate within. Christensen’s recommendation for using a deliberate strategy development process echoes this as he writes that the deliberate strategy “must make as much sense to all employees [as it does to top management] as they view the world from their own context” (HBX, 2015, p. 2). Therefore, reliance on emergent strategy does not mean abandonment of deliberate strategy.

As my strategic project progressed, I would return to the deliberate and emergent strategy development processes and seek to articulate a model for strategy development for the National Board that encapsulated both processes. I discovered an apt metaphor for this model: dripstone columns. Dripstone columns are formed where stalactites and stalagmites have come together (“Stalactite and stalagmite,” 2012). In order for these columns to form, growth is required in both directions. Stalactites, the formations that grow downwards like icicles on the ceilings of caves, are symbolic of leadership and management or the top-down perspective (NOAA, 2013). Stalagmites, the formations that are upward-growing from the floor, are symbolic of the staff or a bottom-up perspective (NOAA, 2013).

Learning Organizations

Next, I considered what conditions might be necessary for an organization to be successful in the context of frequent change. Successful organizations are measured by their inputs and outputs. Often the actual mechanisms of what makes an organization successful are less easily determined and even more difficult to replicate. In the industrial age, the formula for success was predicated
on mechanization, standardization of processes, and the ability to measure productivity by number of hours an employee worked (Edmondson, 2008). This was a system that catered well to a hierarchical authority structure. The industrial age has given way to the information age, one where productivity is increasingly determined by factors that cannot be assessed in the same traditional ways, factors such as ingenuity and interpersonal skills (Edmondson, 2008). In the shift from the industrial age to the knowledge economy, some organizations have been able to adapt and be successful in this quicker, more complex age by transforming themselves into learning organizations.

There are multiple definitions of a “learning organization.” Senge (2005) is credited with popularizing the term, which he defined as “organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (p. 3). Garvin (1993) offers one of the best definitions:

A learning organization is an organization skilled at creating, acquiring, and transferring knowledge, and at modifying its behavior to reflect new knowledge. [Emphasis added] (“What is a Learning Organization?” section, para. 4)

In Garvin’s definition is an important distinction – a learning organization alters its behavior based on its learning.

I was attracted to the idea of learning organizations because it taps into our natural desire to learn, and I intuitively felt that an emergent strategy development process would require learning. My reading confirmed my intuition as Senge (2005) writes how a learning organization enables people to bring their best strengths to bear on a common problem and can make the
collective stronger than an individual. I also felt that people would find working in a learning organization more satisfying because I applied Herzberg’s (2003) motivation-hygiene theory, which postulates people are motivated by jobs that are enriching and allow them to develop within the means of their interests and capabilities.

Additionally, what was most relevant to strategy development was the finding that learning organizations appear to condition people to be more adaptive. While I will go into more depth on adaptation in the next section, the research on learning organizations bears interesting fruit. For example, in examining the adoption of a new cardiac surgery procedure, Edmondson, Bohmer, and Pisano (2001) found that teams with a learning orientation adapted more quickly to the new procedures. From Flaum and Winkler (2015), I learned a term for this characteristic: learning agility. Researchers at Teachers College, Columbia University and the Center for Creative Leadership define learning agility as, “a mindset and corresponding collection of practices that allow leaders to continually develop, grow and utilize new strategies that will equip them for the increasingly complex problems they face in their organization” (as cited in Flaum & Winkler, 2015, “Pillars of Learning Agility” section, para. 2). As I considered how the National Board could develop a next-generation strategy for scale that would allow it to be nimble and adaptive in this changeable world, the adaptability and learning agility that learning organizations could build was attractive to me.

If we believe that transforming organizations into learning organizations will help them be successful, how might we do this? In The Fifth Discipline, Senge (2005) describes how many organizations have structural issues that contribute
to their “learning disabilities” (p. 18). Argyris (1991) calls it a “learning dilemma” (p. 2). Authors agree that organizations need to overcome structural barriers to develop into learning organizations. The literature on learning organizations highlights the need to be intentional and explicit in the building of a learning organization. Garvin, Edmondson, and Gino (2008) outline three requisite building blocks to a learning organization:

1. A supportive learning environment
2. Concrete learning processes and practices
3. Leadership that reinforces learning

At first blush, these three building blocks seem obvious and actionable, but even the authors share that they have proven to be challenging to operationalize.⁴ There are common misperceptions that often impede execution. For example, we often look to leaders to shoulder the primary responsibility in developing the organizational culture, but in examining the adoption of a new cardiac procedure in hospitals, Edmondson, Bohmer, and Pisano (2001) realized that “high-level management support [...] wasn’t decisive in hospitals’ success.” While leadership ideally reinforces learning at all levels, when it comes to fostering a cultural component like psychological safety,⁵ it is the closest supervisor that is most influential (Edmondson, 2008).

Another misperception is the use of structures to facilitate learning. In their work, Edmondson, Bohmer, and Pisano (2001) revealed that some common

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⁴ Garvin, Edmondson, and Gino (2008) created a diagnostic survey to assess the depth of learning that occurs in an organization, providing feedback on the three building blocks to a learning organization. An organization can use the results of this survey to strengthen areas that require improvement.

⁵ Psychological safety on a team is “defined as a shared belief that the team is safe for interpersonal risk taking. For the most part this belief tends to be tacit” (Edmonson, 1999, p. 354).
structures do not necessarily enhance learning. For example, they discovered that formal after action processes were not pivotal to the learning of teams because the best learning happens in the moment (Edmondson, Bohmer, & Pisano, 2001). Despite some of these challenges to creating a learning organization, what is promising is that many organizations have elements of a learning organization.

**Adaptive Leadership**

The previous portions of this review of knowledge for action provided me with content knowledge that informed my residency work, but the practice of adaptive leadership both informed my work and also gave me a richer lens to understand my residency. At its core, adaptive leadership is about leading through change by “mobilizing people to tackle tough challenges and thrive” (Heifetz, Grashow, & Linsky, 2009, p. 14). The practice draws upon scientific concepts such as adaptation and evolution as it seeks to understand the relationships between leadership, systems, and change. Successful adaptation, for example, is understood as enabling a “living system to take the best from its history into the future” by judiciously keeping, discarding, and rearranging parts of its organizational DNA (Heifetz, Grashow, & Linsky, 2009, p. 14).

Having taken classes and modules, read books and articles, and committed myself to the ongoing practice of adaptive leadership for the past year and a half, I believe that adaptive leadership offers a wealth of concepts to inform and analyze the practice of leadership. For this capstone, I selected the most relevant concepts that I drew upon for my strategic project to form an adaptive leadership analytic framework: adaptive and technical challenges, authority vs. leadership, and disequilibrium and the holding environment.
One of the main concepts of the framework is the distinction between “adaptive and technical” challenges. Technical challenges have clear problem definitions, and solutions can be generated based on current knowledge (Heifetz, 1994; Heifetz, Grashow, & Linsky, 2009). However, just because technical challenges have clear problem definitions and solutions does not mean that they are simple. For example, a heart surgery following a heart attack is a complex solution to a clearly defined problem that requires significant knowledge and skill. Furthermore, the locus for doing the work resides within an authority figure (Heifetz, 1994; Heifetz & Linsky, 2002; Heifetz, Grashow, & Linsky, 2009). To continue the heart surgery example, the locus of the technical work falls upon the cardiovascular surgeon.

Adaptive challenges are created at the nexus of change and it is these “changes in societies, markets, customers, competition and technology […] that force] organizations to clarify their values, develop new strategies, and learn new ways of operating” (Heifetz & Laurie, 2001, p. 4). Because adaptive challenges arise out of new situations, they do not have clear problem definitions and cannot be solved with existing knowledge; they require learning and “changes in people’s priorities, beliefs, habits and loyalties” (Heifetz, Grashow, & Linsky, 2009, p. 19). Applying known methods and solutions to adaptive problems often fails to resolve an adaptive challenge (Williams, 2005). The locus for doing adaptive work shifts from authority figures to stakeholders because “sustainability of change depends on having the people with the problem internalize the change itself” (Heifetz & Linsky, 2002, p. 13).

In practice, challenges are not categorized in a strictly either/or dichotomy but often mixed, with technical and adaptive elements intertwined.
(Heifetz, 1994; Heifetz, Grashow, & Linsky, 2009). However, one of the key tenets of the adaptive leadership framework is to avoid the “classic mistake: diagnosing and treating adaptive challenges as if they were technical problems” (Heifetz, 2014, slide 10). While developing a next-generation strategy for scale initially resembled a technical challenge, I would quickly discover that there were many adaptive aspects interwoven with the technical aspects. Part of my strategic project would be mobilizing people and helping them to tackle both the technical and adaptive challenges, which is why adaptation and learning became key behaviors I sought to nurture. At the same time, any model for strategy development I articulated was not about evolving the National Board into something completely new, but instead adapting to keep the best of its institutional knowledge and skills while both discarding unhelpful practices and growing new ones. This is why I termed the development of new strategies for scale, “next-generation” strategies for scale.

Another key concept of the adaptive leadership framework is authority versus leadership. Authority and leadership are frequently confused, but in the adaptive leadership framework the distinction is clear. Authority involves a social contract wherein “Party A entrusts Party B with power in exchange for services” (Heifetz, Grashow, & Linsky, 2009, p. 24). Authority can be either formal or informal. Formal authority is granted when the set of expectations that must be met are made explicit, such as in a job description (Heifetz, 1994). Formal authority endows a person with the power of office that can be leveraged to compel action, for example the president’s use of executive orders. In contrast, informal authority comes from meeting implicit expectations such as expectations of trustworthiness, ability, etc. (Heifetz, 1994). One form of
authority is not better than the other as both have their advantages and
disadvantages. Heifetz (1994) writes that informal authority endows a “subtle yet
substantial power to extend one’s reach way beyond the limits of the job
description” (p. 102). A skillful leader is able to use both formal and informal
authority to engage people in adaptive work. Authority is a resource for
leadership, but authority does not equal leadership.

Heifetz and Laurie (2001) wrote that the practice of adaptive leadership
requires a break from a dominant norm that authority, power, and influence
equal leadership and that leaders “[provide] leadership in the form of solutions”
(p. 4). In the adaptive leadership framework, leadership is viewed as a practice
that some people do some of the time, with and without authority, to mobilize
people to make progress on tough adaptive challenges (Heifetz, 2014, slide 26).
Adaptive leadership is “not about meeting or exceeding your authorizers’
expectations; it’s about challenging those expectations, finding a way to
disappoint people without pushing them completely over the edge” (Heifetz,

Consequently, adaptive leadership creates distress in people, but one of
the tasks of an adaptive leader is to regulate it. An adaptive leader with
awareness that adaptive work produces distress in people should be
compassionate but also must not resort to pressures to remove the element of
discomfort. One of the primary tasks of a leader is to create and maintain a
strong holding environment, a space that “contains and regulates the stresses”
that adaptive work generates (Heifetz, 1994, p. 105). The strength of a holding
environment is gauged against the adaptive challenge, with harder adaptive
challenges require stronger holding environments to contain the strong forces of
disequilibrium (Heifetz, Grashow, & Linsky, 2009). An adaptive leader builds a holding environment by creating and strengthening vertical and horizontal social bonds of trust. Other small and large actions also create a holding environment such as shared values and purposes, shared language, history of working together, and rules of confidentiality to name a few. Once this holding environment is constructed, a leader can begin to raise the temperature and push the disequilibrium because discomfort is needed to move people out of organizational stasis.

An adept leader will deftly manage to generate enough disequilibrium to “gain attention, engagement and forward motion” but not so much that the organization self-destructs (Heifetz, Grashow, & Linsky, 2009, p. 29). In the framework, this ideal state is also known as the “productive zone of disequilibrium” (Heifetz, Grashow, & Linsky, 2009, p. 29). Too much disequilibrium is unproductive and often results in restoration towards equilibrium by avoiding the adaptive work or inappropriately applying a technical solution. In contrast, not producing enough disequilibrium fails to breach a threshold of change and maintains organization equilibrium. Distress and disequilibrium are consequences of tackling adaptive challenges; there is no call to produce distress for its own sake. Adaptive leadership is challenging because unlike models of traditional leadership, one doesn’t protect people from pain or rescue them from it, but allows pain to occur and guides people to respond constructively.

Knowledge of the core concepts of adaptive leadership – adaptive/technical, authority/leadership, holding environment, and productive disequilibrium, allowed me to explore how some key ideas from the framework
become useful in practice and in analysis during my residency. While there are many more important concepts from the adaptive leadership, the final concept I would like to highlight briefly is giving the work back. As an adaptive leader, the task is to make oneself dispensable to reduce people’s reliance on authority figures. The only way this can be accomplished is to “give the work back to others so you can develop their abilities and calibrate their current and potential talents for skills such as critical thinking and smart decision making” (Heifetz, Grashow, & Linksy, 2009, p. 169). Adaptive challenges require that people take on the responsibility of solving the problem because that is the only way to create enduring progress.

Giving the work back also supports the model of strategy development I proposed to the National Board. An emergent strategy development process relies on the expertise, leadership, and entrepreneurial spirit of staff. The staff has to feel that they share responsibility for the problem and the solution in order to engage in an emergent strategy development process. If they believe that the responsibility resides with authority, then they will rely on the authority figure to solve the problem and provide them with the solution. Therefore, my strategic project not only involved mobilizing people to tackle the tough challenges but also investing them in shared responsibility for defining the problem and generating the solutions.
Theory of Action

From a wide breadth of readings, the most salient of which are described above, and my experiences developing my strategic project, I arrived at the following theory of action:

- IF I articulate a model of strategy development for the National Board, and

- IF I create the conditions for the model of strategy development to be successful (such as helping people adapt agilely to change and creating a culture of intentional learning), and

- IF the leadership of National Board makes deliberate strategy decisions, communicating clearer strategic guidance for the staff by defining the job to be done,

- THEN staff members will engage with the challenge of pivoting from the early adopters strategy to the ambiguous space of strategy renewal because there is collective ownership of the problem and solution, and,

- THEN staff members will feel authorized and empowered to experiment and generate emergent strategies, while also learning from successful efforts,

- SO THAT a next-generation suite of strategies can be developed to bring accomplished teaching to scale.
The Strategic Project: Shaping Dripstone Columns

I organized the development of my project into three stages defined by the shape of my activities. The table below summarizes the three stages:

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
<th>Time Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>FUNNEL</td>
<td>Movement through ambiguity and uncertainty with an open and neutral perspective; marked by discovery – distilling a diagnosis of an adaptive challenge, and iterating on theories of action towards a narrower focus</td>
<td>July to November</td>
</tr>
<tr>
<td>BOUNDED</td>
<td>Finding clarity in focus – marked by an ability to define clear boundaries between what focus is and is not</td>
<td>December</td>
</tr>
<tr>
<td>EXPANSION</td>
<td>Expansion into complexity; marked by an ability to recognize the articulation of the focus point to multiple points in a complex system</td>
<td>January to March</td>
</tr>
</tbody>
</table>

Stage I Description

As I described in the introduction, I arrived at the National Board in a time of substantial transition. While the organization struggled to orient itself through the changes most recently generated by the new leadership, I was left to find my footing independently. Although I understood that my residency was about developing a new strategy for scale, I could not yet operationalize what that meant for my day-to-day work. I did not know with whom I should be working, what I would by doing, or what I was trying to produce.

Therefore, in the first stage of my strategic project’s development, I operated with a “funnel” approach, taking an open and neutral perspective as I
learned about the National Board’s current context, array of work, strategic history, and organizational culture. Through this exploratory process, I sought to understand the challenges of producing a next-generation strategy for scale, find a good entry point into strategy development, and more clearly define the body of work I would undertake in my residency. In essence, I was searching for a job to be done at the National Board that could become my strategic project.

The funnel approach was supported by the adaptive leadership framework which places a significant emphasis on studying a situation and then developing an array of possible diagnoses before making a choice to explore further a single diagnosis. This discipline is extremely challenging in practice because leaders feel a sense of demand and urgency from people to act straightaway and are rewarded for their decisiveness. Aware of my own tendency towards immediate problem-solving as well as my lack of knowledge about the National Board, I proposed in the first week of residency to my supervisor that I spend some time with various members of the senior leadership team in an attempt to learn and understand the culture and scope of work at the National Board.

We planned a five-week period where I shadowed five members of the senior leadership team for a week each. Appendix B is a chronology of key events in the development of my strategic project and includes details about the senior leadership team members I shadowed. My observation period provided me with an unusual opportunity to orient myself to the organization without any loyalty to any division because I had not yet been placed on a team. While I was able to see much of the business as usual, I also felt that I was given access to a little bit of what was usually kept behind closed doors. For example, I heard how
different teams spoke about each other which was fascinating but also helped me see potential fault lines between different perspectives on the work of the National Board. I participated in contained functional teams and cross-functional teams, where I observed horizontal relationships between staff members. I also was able to observe the vertical relationships between the senior leadership members to staff in both group and one-on-one settings. The observation period reinforced my instinct that cross-functional collaboration was a practice that the National Board should strengthen and planted the seed for my strategy development theory that would reconsider the “top-down or bottom-up” choice.

In late August, I took the lead in the design of a two-day meeting held on September 16th and 17th with the Senior Vice-President of Strategy & Policy and the Senior Vice-President of Outreach & Engagement. The two Senior Vice-Presidents (a.k.a. SVPs) had originally conceptualized a meeting to convene their teams and make the case for a new strategy to scale based on the teacher career continuum. As I gradually gained more responsibility for shaping the agenda, I used my professional experience planning and facilitating meetings for adult learners and my observations of the organization and ideas from RKA to guide the design of what I called the September strategy sessions.

For example, the original audience for the September meetings only included members from each of the two SVPs’ divisions, but because I had seen a need for more cross-functional collaboration in my observation period, I suggested expanding the group to include people from the Standards, Assessment, and Innovation division. After a series of discussions over the participant list, we invited six members from the Standards, Assessment, and
Innovation division and five “external guests,” local board certified teachers. In total, we had 26 participants on the first day and 24 on the second day.

While the key objective for the strategy session was to frame and develop urgency for developing a new strategy to scale, I drew from my readings to generate more specific objectives:

1. Ground ourselves in our vision for the profession and how we can bring it to reality over the long term
2. Introduce systems-level thinking as the approach to our work and apply that to our 2016 planning process
3. Engage in cross-functional collaboration to benefit from multiple perspectives and shared learning
4. Launch intentional learning structures and processes to continue learning both within and between teams

The two SVPs and myself shared facilitation responsibilities for the September strategy sessions. The first day was designed to set the stage by building urgency and buy-in. The second day sought to turn the urgency and buy-in into action by beginning some of the work of strategy development. The participants spent most of the second day working with a strategic planning template that I introduced. Throughout the two days, we received such clear feedback from the group in comments people made during the sessions and through various feedback processes that the staff craved more of the opportunity to spend time together learning, collaborating, and thinking about our work strategically that the SVP of Strategy & Policy announced at the end of the second day that I would plan and facilitate these sessions on a regular basis.

I latched on to the strategy sessions as a way to move my way down the funnel and narrow my focus to a task that I could own. Following a successful and affirming launch with the September strategy sessions, I fully expected the
next strategy sessions to go just as well. Both October and November’s strategy sessions surprised me because they did not proceed as planned. I found myself frustrated and confused that I was unable to replicate my successes from September. While I do not have the space to go into detail on what happened, what is important is to recognize that autumn was a distinct period of experimentation and learning as I tried very different activities to get us back on track for productive strategy development. While we had many interesting conversations in October and November, the “so what” question lingered. I sensed that although I was narrowing my focus on these strategy sessions and getting closer to some rich work, I was at risk of drifting off course because I was losing the thread of connectivity to how these strategy sessions would lead to a next-generation strategy for scale.

**Stage I Results**

The key indicators for progress in stage one were outcomes that demonstrated that I better understood the challenges of producing a next-generation strategy for scale and had moved down the funnel from the wide expanse of possibilities towards an entry point for strategy development and a more focused understanding of the strategic work. By the end of stage one I had two outcomes that marked development towards an entry point and defined strategic project: 1) a diagnosis of the adaptive challenge, and 2) the creation of monthly strategy sessions that I designed and facilitated.

*Diagnosis of the adaptive challenge.* At first, I believed that developing a new strategy for scale was a technical task because I assumed senior leadership dictated a strategy through a deliberate process and the staff translated that
strategy into their daily work. However, as I learned in my RKA, a deliberate strategy development process is best used when a winning strategy is known (HBX, 2015). As I studied the National Board in stage one, I came to realize that the organization not only didn’t have a winning strategy to scale, but its historical early adopters strategy was extremely resilient. Therefore, the task of defining a next-generation strategy for scale was an adaptive challenge that required several steps to “clarify some values,” as well as unlearn some of the old and learn something new (Heifetz & Laurie, 2001, p. 4).

I hypothesized that part of the reason that the early adopters strategy was so resilient was because it was driven by technical solutions: create certain incentivizing conditions (i.e. candidate fee support, pay and recognition for achievement) and scale will come. Technical solutions yield clear results and afford security because one can gain competence and expertise. But the early adopters strategy had only gotten the National Board to 3% of teachers becoming board certified. In order for the National Board to successfully cross the chasm, its staff had to take the leap into an ambiguous space of the unknown. I believed that if I could lead people forward into the ambiguity, the uncertainty could catalyze an emergent strategy development process if the conditions were right. Therefore, I defined the adaptive challenge as “pivoting from the early adopters strategy to the ambiguous space of defining the new strategic direction.”

**Strategy sessions.** When I designed and facilitated the September strategy sessions, I did not expect that they would be a regular occurrence. However, the feedback from the September strategy sessions compelled us to continue them. The extension of the strategy sessions validated that I was narrowing my focus in an area that was salient to the National Board and the staff. The National Board’s
staff wanted to learn and collaborate with each other and they appreciated a space developed for them to step out of their normal hectic day-to-day pace and take the time to examine the body of their work.

Although my September session objectives did not explicitly mention strategy, the staff also seemed receptive to strategy development. Observing people in the strategy sessions gave me information about where individual staff members were in their readiness to engage in individual strategy development. Some staff members were more ready, willing and able than others. Some staff members were ready and able, but unconscious of their attachment to the early adopters strategy. A few staff members were able to recognize the ambiguity around the new strategic direction and the challenges it presented in moving away from the early adopters strategy. Understanding people’s readiness for strategy development also gave me insight into individual staff members’ capacity for disequilibrium. My better understanding of the people I worked with influenced how I thought about the model for strategy development as well as helped me uncover some of the challenges of creating a next-generation strategy for scale.

Furthermore, the strategy sessions served a petri dish for my ideas as I developed my theory of action. At the time the wide variations between the strategy sessions from September to October to November felt reactionary. Originally I considered the October and November’s strategy sessions failures because they did not transpire according to my grand plan. Given the benefit of more time and space, I recognize that my commitment to the strategy sessions and their ongoing pattern forced me to learn from my missteps. My reflection on
my mistakes and learning allowed me to move rapidly, if not smoothly, down the funnel towards clarity of my strategic project.

**Stage II Description**

If the first stage of my strategic project’s development left me with a narrower focus, but a lack of clarity, the second stage brought clarity into sharp focus. This is why the shape of my actions in this stage resemble a square with straight lines delineating clear boundaries. In December, I could clearly define my strategic project, and this clarity had an immediate and dramatic impact on the progress of my work.

In stage one, I focused almost exclusively on the strategy sessions and found that despite my efforts they were somehow missing the mark. As I analyzed why my strategy sessions were not quite having the effect that I wanted, I had two key revelations that led to the second stage of my project’s development. The first revelation was that focusing on a clearly bounded and specific locus of work was not the same as simplifying the work. The second revelation was that I was concentrating on the wrong grain size with my strategy sessions.

At some point in between October and November, I had become aware that I was resisting a focusing that was naturally happening. In October I had experimented with partnering with the Manager of Outreach who facilitated the bimonthly State Outreach team meetings. The State Outreach team consisted of members from Strategy & Policy and Outreach & Engagement divisions, a subset of the cross-functional team that I had been convening for the strategy sessions. State outreach was work in the field that was geography specific whether that be
National Board work in a district like Wake Country, NC, or states involved in projects like our Network to Transform Teaching (a.k.a. NT3) such as New Mexico and New York. The partnering of the State Outreach meetings with my strategy sessions had gone well, but I had almost abandoned the idea because I was so attached to the idea of working with a large cross-functional group. I erroneously believed that the only way to have large-scale impact was to focus on a large group with a complex problem. My desire to work with a large cross-functional group nearly blinded me to some of the challenges that I was encountering, most significantly whether I could have a meaningful impact within the short timeframe with a group that I was still forming.

With the revelation that focusing was not the same as simplifying, I recognized the advantages of concentrating on the State Outreach team. This established group could provide me with a clearly bounded and specific locus that I could manage. The group might be smaller, but the problems we were wrestling with were no less complex. Furthermore, because it was an established group, I could focus on doing substantial adaptive work rather than forming a new team. By the end of November, I embraced concentrating on the State Outreach team and I made a series of decisions to clarify the logistics of my strategic project: I decided to regularly partner with two colleagues to plan and share the work, defined my targeted audience, and grounded myself in the project outputs and a more mature theory of action. Once I made these decisions and bounded my strategic project, I could more clearly divide my work streams. I realized that I could continue to do a variety other projects, but all of that work wouldn’t be my strategic project. Although all my work contributed towards the
same aims, my newfound confidence and clarity in defining what was and what was not my strategic project allowed me to pursue work with a renewed vision.

The ability to define and envision my strategic project also led to my second revelation – that I was concentrating on the wrong level of granularity with my strategy sessions. My strategic project was not just hosting isolated meetings, but embedding those meetings into an organizational system. The most obvious local organizational system was the meetings, processes, routines, and all the inputs that informed the work that our State Outreach staff did on a daily basis in the field. My revelation about systems also helped me understand that one reason why the October and November strategy sessions felt reactionary was that they were not connected to anything besides the other sessions, a tenuous reason for existence – meetings for meetings’ sake. As I began to define my strategic project not in terms of meetings but in terms of the system I was trying to build, I developed a more specific theory of action that drove my daily work:

IF I

- Design and facilitate a series of monthly strategy sessions that introduce a suite of tools and processes (e.g. state and initiative strategic plans, consultancy process),
- Develop a State Outreach planning team,
- Redesign State Outreach meetings with the planning team, and
- Have ongoing meetings to tighten connections within the State Outreach “system”

THEN

- I will see an emergence of a sustainable and more coherent strategic planning and learning system for the State Outreach team

SO THAT

- Staff, with increased strategic planning capacity, will develop an appetite for developing and experimenting with new strategies
I still held to the theory of action I introduced earlier, but this nested theory of action helped me conceptualize the work that I did day to day with my strategic project, while also helping me hold the connection of my work to the larger outcome of developing a next-generation strategy for scale. I could now see that my work in the State Outreach system was cultivating the conditions for an emergent strategy development process.

My newfound clarity in stage two helped me execute December’s strategy session with much more success as I returned to September’s strategic planning work. In December, I incorporated the lessons learned in the first stage to better build the work from the initial aims in September. Additionally, I reaped the first major benefit of working with a team when they helped me recognize a key shift in my approach.

This shift happened when the three of us on the State Outreach planning team gathered at the end of November to plan December’s meetings. We had been discussing common sentiments of frustration with the fits and starts of the work when I noticed a change in how we were talking about dealing with the frustration. Each of our previous efforts had been framed around an assumption that – if we rationally spoke about the work of next-generation strategy development, which the three of us saw as obviously critical for the National Board – our colleagues would pick up the strategy development work with the same enthusiasm that we had. In this particular planning meeting, we realized that just talking at our colleagues was not an effective way to engage them. When I called out how I noticed that we were evolving our approach to try to get colleagues to do the work we wished to see happen rather than talking to them about the work, it was a major “light bulb” moment that I am not sure any of us
would have had on our own. I was only able to detect it by observing the conversation that occurred in this planning meeting.

Now that I had articulated our new approach, we could better use it. In the same way that educators know that the best way to get children reading is to have them in text a lot, we now understood that if we wanted staff to take on more of an emergent strategy development process, we needed them to do more tasks that required strategic thinking. Therefore, we not only resurrected the strategic plans but began to talk about other ways in which we could have our colleagues engaging in strategic thinking beyond just the plans. We imagined the kinds of conversations we wanted to have more of, devised opportunities to learn from our past actions to better develop strategy moving forward, and thought about how we could work more collaboratively for better strategy development and execution. With my newfound ability to articulate the work of my strategic project and my theories of action and the support of my partners on the planning team, I regained the enthusiasm and confident footing I had last experienced in September.

**Stage II Results**

The first key indicator of progress in stage two was the extent to which I could define my strategic project. Evidence of progress on this indicator is self-evident: in December I actually *could* articulate my strategic project, although at the time I thought it was just about creating the conditions for an emergent strategy development process. Additionally, in stage two I had a sophisticated set of nested theories of action, together with a definition of a strategic project I now had two things that I lacked in the first stage of the project development.
With a clear strategic project and theories of action, additional indicators of progress in stage two are outcomes that demonstrated the emergence of a sustainable and more coherent strategic planning and learning system for the State Outreach team.

**State outreach planning team.** The formation of a State Outreach planning team by establishing a partnership with the Manager of Outreach and Manager of Policy was an important step in building a sustainable strategic planning and learning system. Whereas in October and November I was more of a thought partner for planning these meetings and we had coordinated my strategy session with the State Outreach meetings, in December we decided to become a formal planning team with shared responsibilities for State Outreach. I instituted regular planning meetings and envisioned my role as a planning partner that also served as a key liaison to the SVP of Strategy & Policy and the SVP of Outreach & Engagement, to improve some of the vertical communication.

An accompanying change with the creation of the partnership was that my strategic project naturally expanded beyond “strategy sessions” to include additional planning meetings with a core team of partners and the regular State Outreach meetings. One event accelerated this transition: just after we decided to partner, the Manager of Outreach announced that she would be leaving the National Board in December. For many reasons, I was asked to temporarily step into facilitating State Outreach meetings. The organic funneling of my focus to the State Outreach team was a fascinating output of using a more organic bottom-up discovery method to uncover the best solution rather than a top-down process. In connecting my strategy sessions to the existing State Outreach
team, I matched my skill set with an area of the organization that needed my capacity.

The partnership was a mutually beneficial one for myself and the Managers of Outreach and Policy. The partnership validated the need for the work beyond my own need for a strategic project and provided me with an opportunity to develop capacity within my colleagues. It also established a process of sustainability for any of the work the partnership would collectively pursue going forward. The sudden exit of our Manager of Outreach taught us the importance of building in safeguards for continuity of ideas and practices.

*Introduction of tools and processes.* Another outcome from the second stage was the revival of the strategic plans that were drafted in the September strategy sessions. In another setting it might seem futile to resuscitate a practice that did not naturally become adopted by the staff, but in stage two I had a clearer understanding that the tools and processes I was introducing were designed to increase State Outreach team members’ strategic thinking. Furthermore, I was beginning to realize that I could use technical solutions as a structure to facilitate adaptive work.

I had hypothesized that one of the reasons why the strategic plans had never been adopted by our staff was because the managing supervisors (i.e. the SVPs) had not sustained the practice beyond the September strategy session. This was confirmed when two separate staff members made comments in December effectively stating that if the strategic plans were a clearer priority for their supervisors, it would be a larger one for them. I both recognized the importance of re-engaging the SVPs in the strategic plans but also saw an opportunity for adaptive work with the staff. This adaptive work was that I had to get staff
members to see the value of strategic plans for themselves and not be so reliant on cues from their supervisors to determine the value of a set of work. As the planning team communicated how the strategic plans would help improve the collaboration and learning on the State Outreach team so that we could all do our work better, staff members became visibly more engaged in the process. For example, at the end of the December meeting, one staff member suggested that the group not rely on the SVP for feedback on their plans but work together to help each other strengthen their plans (Anonymous, personal communication, December 17, 2015). This was budding evidence of the staff becoming more empowered and authorized to take on strategy development work.

As I worked to secure buy-in from the staff on the strategic plans, I also re-engaged the SVP of Outreach & Engagement. At the end of the December strategy session, she pulled me and the Manager of Policy aside because she was full of new ideas for how she wanted to use the plans to spur more strategy development from our staff. It appeared that the clarity that I found in my strategic work in stage two served to not only benefit myself but others as well.

Stage III Description

When I first drafted this capstone, I thought that I could easily end my narrative in December when things were going well: a sustainable and more coherent State Outreach system was beginning to consolidate and an emergent strategy development process was on its way to being established. However, after the holiday break, a series of developments convinced me that I had to continue the story with another new stage.
In this third stage I noticed that my field of vision seemed to widen as my understanding of my strategic work became even more complex. Whereas in stage two I realized that I was focusing on the wrong granularity by focusing on just the strategy sessions and turned to examine the local system (i.e. State Outreach), in stage three I could step back from my strategic project and see how the local system fit into a larger scheme of organizational culture adaptation, capacity building, and strategy development at the National Board.

Stage three revealed to me that the clarity and focus that marked stage two was illusory in its permanence because defining adaptive work often increases its complexity. As practitioners know, our most challenging work does not remain static but continues to evolve. In fact, one element of an adaptive challenge is that “it is difficult to come to grips with and changes with every attempt to address it” (Camillus, 2008, p. 3). F. Scott Fitzgerald (1936) wrote in an article for *Esquire* that, “The test of a first-rate intelligence is the ability to hold two opposed ideas in mind at the same time and still retain the ability to function” (para. 2). While I am not sure about my intelligence, the ability that I developed that allowed me to hold more in my head and still function was helpful in improving how I understood and approached my work. Thus the shape of the third stage is a triangle that symbolizes an expansion in complexity.

What this expansion in complexity looked like in practice was that once I could confidently articulate the boundaries of my strategic project, I almost immediately began to identify touch points and interdependencies where the State Outreach system interacted within the larger and more complex organizational system of the National Board. For example, we had recently completed an annual performance report (a.k.a. APR) in February for a major
grant and I recognized that elements of grant project management were closely related to the State Outreach system. I translated my wider perspective to my strategic project by continuing to develop the State Outreach system but strove to include and improve new elements that articulated with other aspects of the National Board. While there were many areas I could have focused on, I chose to prioritize project and financial management of grants because much of State Outreach’s work was funded by grants. Eventually, I took on increased responsibilities in the Outreach & Engagement division, including some project management responsibilities for the Bill & Melinda Gates Foundation Building Demand and the Kellogg Foundation Southern States grants. I began to meet and collaborate regularly with new partners within and outside of the Outreach & Engagement division.

My new responsibilities led me start advocating for some deliberate strategic decisions from the senior leadership around our field work. With insight to the activities taking place across the country from individual conversations with all the directors of outreach and managing the suite of tools the State Outreach team was utilizing, I recommended that we select four promising strategies: NBCT Ambassadors, Advocacy Training, Engaging School Leaders, and Professional Development Schools. Members of the State Outreach team could implement these four strategies in a variety of sites across the country and then network these sites together to improve our implementation and learning. The most obvious benefit to these deliberate strategy choices was providing some top-down strategic guidance to the staff. At the same time, while the National Board leadership might be tight on the strategies, it could be loose on the execution, allowing staff space to innovate and lead. In this way, I saw the
opportunity for a form of strategy development that combined deliberate and emergent processes.

At this time, I also began to recognize the ways in which the nascent State Outreach emergent strategy development process was discrete from our other resources: standards, ATLAS, and to a lesser extent, board certification. Since my observation period in stage one, I had felt the existence of a soft boundary line between the Standards, Assessment, and Innovation division and the Outreach & Engagement, and Strategy & Policy divisions that I suspected existed as a result of the work of National Board becoming rapidly complex. As staff worked hard to maintain the changes to their work (i.e. assessment re-design, ATLAS, leadership changes, etc.), their laser focus on their own work kept them from being able to take a more systemic approach. What now existed as a soft boundary line as a result of intense focus on individual work had the potential to become a widening gap unless there was more conscious effort to braid all these various streams of National Board work together as they developed.

Another key event in stage three was that the senior leadership team began to engage in a deliberate strategy development process. In January, the SVP of Strategy & Policy initiated a deliberate strategy development process with members of the senior leadership team in a series of meetings that they called their FOCUS meetings. I watched this process unfold with excitement and curiosity because as I had gained clarity about my own strategic project work and conviction in utilizing an emergent strategy development process, I also became more convinced of the need for a parallel deliberate strategy development process.
Despite my strong opinion that we needed senior leadership to make deliberate strategic decisions, I was ultimately uncomfortable being an agent for building urgency for a deliberate strategy development process with the senior leadership team. Instead I attribute the ripening of the deliberate strategy development process to our fundraising needs. Towards the end of December, but particularly in January, the senior leadership team members were receiving some clear signals from partners and grantors who wanted to hear more specifics about how the National Board, particularly in the midst of all these changes (i.e. Assessment redesign, ATLAS, new president & CEO) planned to scale. Thus ultimately it was this external feedback that ripened the issue rather beautifully. Across several meetings, I watched the senior leadership team struggle to make meaning out of ambiguity. Not surprisingly, their process mirrored my own. After several meetings, they decided to focus on a single concrete example – Alabama – and I observed how focusing on a clearly bounded and specific locus of work helped them begin to make decisions and gain some clarity too.

While I can’t take credit for the ripening of the deliberate strategy development process, I did make an effort to leverage it in my strategic project work. As the senior leadership team began to discuss more specifics for a new strategy approach, my access to those conversations allowed me to take them to the State Outreach team and begin to try to shape the conversations to parallel and reinforce the conversations I knew the senior leadership team was having. In this way, I could serve as the liaison between the deliberate and emergent strategy development processes. In this intermediary position, I shaped my model of strategy development for the National Board to combine the top-down role of senior leadership with a bottom-up role for staff.
Stage III Results

In stage three, I evaluate the overall success of my strategic project by measuring progress on four outcomes that were attainable within the timeframe of my residency:

• **Outcome 1:** Articulate a model of strategy development for the National Board

• **Outcome 2:** Design and facilitate a series of monthly strategy sessions that introduce a suite of tools and processes

• **Outcome 3:** Establish a coalition to lead the development of a sustainable and coherent strategic planning and learning system for State Outreach

• **Outcome 4:** Develop an increased strategic planning capacity in State Outreach team members so that new strategies are developed and learning occurs from successful implementations

These outcomes are tied to the two elements of my strategic project that are outlined in the theory of action on page 37:

1) Articulate a model of strategy development for the National Board,

2) Create the conditions for the model of strategy development to be successful.

For Outcomes 2, 3, and 4, I drew upon the language of the second theory of action on page 47 to further specify my actions for creating the conditions of success for the strategy development model.
The table below summarizes the assessment of the success of my strategic project against the four outcomes:

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>No/Limited Progress</th>
<th>Slight Progress</th>
<th>Progress</th>
<th>Moderate Progress</th>
<th>Significant Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outcome 1: Articulate a model of strategy development for the National Board</strong></td>
<td>▢</td>
<td>✔</td>
<td></td>
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</tr>
<tr>
<td><strong>Outcome 2: Design and facilitate a series of monthly strategy sessions that introduce a suite of tools and processes</strong></td>
<td>▢</td>
<td>✔</td>
<td>✔</td>
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</tr>
<tr>
<td><strong>Outcome 3: Establish a coalition to lead the development of a sustainable and coherent strategic planning and learning system for State Outreach</strong></td>
<td>▢</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outcome 4: Develop an increased strategic planning capacity in State Outreach team members so that new strategies are developed and learning occurs from successful implementations</strong></td>
<td>▢</td>
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</tbody>
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**Outcome 1**

*Articulate a model of strategy development for the National Board*

By stage three I could articulate the top-to-bottom strategy development model and had named it the dripstone column model. The dripstone column model took the idea of deliberate and emergent strategy development processes from Christensen and Raynor into account with the culture and context of the National Board.

In the dripstone column model of strategy development, the senior leadership team mainly provides strategic guidance such as entry points for the work, establishment of key partnerships, allocation of resources, etc. to signal strategic direction and priorities. With this deliberate strategic guidance from senior leadership, staff would participate in an emergent strategy development
process that capitalized on their expertise on salient issues and solutions in the field. With the ability to oversee the entire organization, senior leadership then acts as traffic cops and matchmakers, making sure that people can do their work efficiently within their lanes, but connecting people as needed. Taken together, everyone at the National Board would have a shared ownership in the strategy development of next-generation strategies for scale. The dripstone column model also helped me shift my thinking from developing a single, omnipotent next-generation strategy for scale to how an emergent strategy development process would lead to several strategies for scale that could be deployed dependent on each situation’s unique contextual factors.

In stage three, I not only had a model for strategy development for the National Board but also some nuanced ideas of how it might work. For example, my recommendation of the four strategies for State Outreach highlighted for me the difference between $\textit{S}trategy$ and $\textit{s}trategy$. The work that I engaged the State Outreach team in was micro, little “s,” strategy development. When I offered my deliberate strategy recommendation of the four strategies and asked the State Outreach team members to engage in practices like strategic planning of additional activities for their states, we were participating in a micro dripstone column strategy development model. At a micro level, $\textit{s}trategy$ was the set of actions people who did field work engaged in to scale board certification and accomplished teaching in their respective regions.

However, I believe that the micro dripstone column $\textit{s}trategy$ development is informative for the larger National Board dripstone column $\textit{S}trategy$ development. For example, each of the four strategies I recommended for State Outreach modeled new ways for the National Board to engage others in
partnership to scale accomplished teachers. Whereas previously the National Board engaged much more directly in the work of scaling, these new strategies experimented with cultivating others to share the work with our guidance. As the senior leadership observed how the implementation of the four strategies of State Outreach went, generalizable lessons could be gathered to inform ideas for Strategy work such as whether certain strategies are proving to be more effective at a district or state level or in a particular kind of district/state, whether it is important to partner with the teachers’ union or other critical stakeholders, what role technology plays, etc. The deliberate Strategy work of the senior leadership team would be to oversee the strategy development of various teams and make calls on which strategies to elevate, continue and scale, and which (and when) strategies to stop. This Strategic learning and guidance informs the emergent strategy development, thus metaphorically illustrating how a dripstone column strengthens itself over time.

This kind of omniscient observation also works internally as the senior leadership oversees all the work occurring across the organization. Senior leadership can address issues of soft boundaries that can occur with the development of strategy and ensure that certain work comes together in meaningful ways as part of the organization’s Strategy. For example, the recognition that State Outreach was operating too independently of the Standards, Assessment, and Innovation division can be addressed with deliberate strategic guidance to reconnect the people and the strategies. While the staff members must be the ones to do the emergent strategy development work of thoughtfully integrating standards, board certification, and ATLAS into the four strategies I recommended for State Outreach, deliberate strategic
guidance ensures that this work occurs. In this way, strategy work and Strategy work create a loop of learning that senior leadership drives and hopefully leads to a virtuous cycle of growth.

**Outcome 2**

*Design and facilitate a series of monthly strategy sessions that introduce a suite of tools and processes*

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By the end of January, the State Outreach planning team had a full suite of tools (e.g. strategic plans, budgets and progress tracking) and were using them regularly. The State Outreach planning team was working to establish the use of these tools into regular practice. The tools complemented each other and this also reinforced their use. I continued to push for the adoption of these tools because I believed that, if I developed a more thoughtful and coherent system for our State Outreach work, then we would not only improve the strategic planning capacity of the staff but we would also automate some of the administrative work. This would free up even more capacity, allowing us to reallocate energy back to strategy development and execution.

Of the three tools, the strategic plans were the least used tools of all. However, one particular aspect of the strategic plan was very helpful: the goals. The goals of the plans offered an opportunity to engage in dialogue about what staff members understood about their local context, what ideas they had about what could be accomplished, and how it might be accomplished. The importance of the goals was illustrated by the SVP of Outreach & Engagement goal reviews where she, the VP of Outreach, and myself met with her direct reports for over an hour to strengthen their goals. These reviews were helpful because the goals drove the work the staff did, the resources they requested via their budgets, the
problems of practice they brought to State Outreach meetings, and more. While there is more untapped potential in the strategic plans, the use of the goals was a strong start for the implementation of this new tool.

Every other week, State Outreach team members would complete a progress tracker in a Google document updating their progress against their strategic plan goals. In the past, this was viewed as a compliance tool to register “policy wins.” The planning team adapted the progress tracker for this year to be a method of making work transparent. As team members entered their information, the planning team for State Outreach reviewed it and flagged inputs that were achievements that should be highlighted and discussed as a team, as well as problems of practice to bring before the group. In this way, the progress tracking has helped contribute to increasingly rich and collaborative State Outreach conversations. If one looks at the agenda items in the summer (i.e. July, August, September) and tracks the evolution to October, November, December, January, and February one would see a notable shift from technical/reporting topics towards more discussion and problem solving. While some of that might be a function of timing, in a February feedback survey one individual wrote: “This meeting has seen a lot of iterations in recent years, and I really think that it’s becoming a more useful space. Huge kudos to Kristen and [the Manager of Policy] for bringing structure and modeling a learning stance.”

The budget process followed the path of the strategic plans in that they stalled for nearly two months, but currently at the end of stage three they are fully driving the work. In mid-March I largely took over the budget management process and it has been powerful in facilitating regular, strategic conversations about the work. Although part of the increased conversations is a result of my
taking on more project management responsibilities, in general the budget process has opened up lines of communication across the team and even across other divisions. For example, there has been increased communication with Finance, which has been minimally involved in project work conversations. Resource allocation is powerfully connected to strategy development and being the holder of budget allows me to use this process more intentionally as part of a dripstone column strategy development process.

I am optimistic that these tools are great resources for learning and strategy development if we can continue to keep the momentum. While there has been significant progress, I am not yet confident that these developments are sustainable and will persist. What is most important about the continued usage of tools is that they are used in sophisticated ways, not just as static reports, but as entry points for conversation about strategy – both the little “s” and big “S” versions.

### Outcome 3

*Establish a coalition to lead the development of a sustainable and coherent strategic planning and learning system for State Outreach*  

The coalition, which was established in stage two, continues to strengthen. In December I asked the Manager of Policy to think about who else we would want to bring on board, both to replace the Manager of Outreach that left and me for whenever I would leave. In February we decided to bring on board a Director of Outreach. Our new third partner is a relatively new hire who works on the outreach side, is a remote staff worker based in Arizona, and is an NBCT. It is helpful that the Manager of Policy nominated the new third partner and the Director of Outreach is a complement to the Manager of Policy in terms of
perspective since she comes from a different division (i.e. Outreach & Engagement). We also discussed adding another staff member later because we realized that we were tilting heavily towards the newer and admittedly younger staff members. We have held off on discussing my replacement since I extended my stay at the National Board post-residency.

In stage three, I began consciously trying to transfer more responsibility to my partners on the planning team. However, this is an area of improvement both for me and for them. As I’ve worked to give them back the work, I have come to realize that in many areas they still require development in building both their skillset and confidence. A specific example that both require more development in is facilitation. The State Outreach team is a particularly challenging group to facilitate given the size of the team, the diversity of the perspectives, and the presence of authority figures on the team (i.e. SVPs). While I have some confidence of the sustainability of my efforts, I can see there is still ongoing work that needs to be done to strengthen the team.

Another area of improvement in stage three was the engagement the senior leadership, particularly the SVP of Strategy & Policy, SVP of Outreach & Engagement, and the VP of Outreach. As I took on more leadership both in and beyond State Outreach, I actively worked on coalition building with senior leadership. In stages one and two I relied on my personal relationships with the senior leadership team members, but in stage three I recognized ways that I could more strategically build a coalition that allowed me to be a boundary spanner⁶ between the senior leadership and the staff. While, I tried to be

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⁶ “Boundary spanning activity is a set of activities or actions that allow people between groups to process information, coordinate tasks and be roving ambassadors between jurisdictions.”
considerate of the many demands on their time and ensure that I was stepping up to leadership and authority when it warranted, I knew that for multiple reasons it was important to have them engaged.

**Outcome 4**

*Develop an increased strategic planning capacity in State Outreach team members so that new strategies are developed and learning occurs from successful implementations*

| SLIGHT PROGRESS |

The tools (i.e. strategic plans, budgets and progress tracker) provided some of the scaffolding to have the members of State Outreach engage in more strategic thinking and planning. One way that the tools, strategy sessions, and the redesigned State Outreach meetings have facilitated increased strategic planning capacity is by creating the time and space for staff members to engage in strategic thinking.

However, in terms of developing strategic planning skill, the results are more mixed because efforts on this front were triaged. While some growth is evident in those team members who received extensive coaching support (i.e. the goal reviews), in the other team members there is no evidence of increased strategic planning skill. While several of those other team members already have strong strategic planning skills, they should still receive support and development to further improve their skills and grow their capacity. Development of all staff members builds a culture of intentional, differentiated learning that can be leveraged for improved individual and organizational performance.

(Mascareñaz, 2015).
The progress tracker, redesigned State Outreach meetings, and budget conversations have allowed for some learning to occur from successful implementation, but more could continue to happen. The State Outreach team has a preference for using the State Outreach team meeting space for problem solving. Achievements are not as often noted in the progress tracker and the planning team for State Outreach has not put in place structures to encourage more learning from successes. For example, returning people to their strategic plans to do quarterly reviews might be one effective process. Another might be using the submission of an annual performance review for a grant as an opportunity to discuss what worked and what was learned. Learning from successful implementation remains an area of growth for the State Outreach system as much as raising concerns and problems.

In terms of developing new strategies, many engaging conversations have happened, for example, recent discussions in State Outreach meetings about micro-credentialing and micro-badging, or how to leverage ESSA. However, none of these conversations have translated into development and experimentation with new strategies. In many ways, it seems as though staff members are still hesitant to experiment. I believe that part of this hesitation comes from the lack of strategic guidance from senior leadership. Overall, there is progress but still a lot of work to be done on this outcome.
Analysis

In this section I revisit selected concepts from the adaptive leadership framework to guide my analysis of why I found resulting outcomes. The concepts are:

- Authority (Formal and Informal) and Leadership
- Technical and Adaptive Challenges
- Disequilibrium and the Holding Environment

I begin with myself as a unit of analysis and then analyze the National Board from an organizational point of view.

Authority and leadership: A self-analysis

At first, I believed that I began my residency with little informal or formal authority, and thus part of my effort in stage one was to gain authority. However, I underestimated the informal authority I began with as I did not consider the ways in which I gained authority in my residency process. Furthermore, I had the advantage of being preceded by another Ed.L.D. resident, my supervisor and a SVP at the National Board. Acknowledging that I began with some informal authority, at least amongst the senior leadership team, helps me understand why people trusted me so readily during my observation period and why I was almost immediately given the authority to plan the September strategy session.

While I may have had some initial informal authority with the senior leadership team, I still needed to develop authority within the organization where I was an unknown, title-less, “resident.” I was fortunate that the September strategy session provided me with a great vehicle to accomplish this.
The visibility of the strategy session and my role within it enabled me to gain informal and formal authority with my colleagues. For example, at one point during the September strategy session, someone commented to the group how powerful it was to see a new member of the organization leading this kind of event. When the SVP of Strategy & Policy announced in his concluding remarks on the second day that I would continue to plan and lead strategy sessions at upcoming home weeks, in front of the group, he publically invested me with formal authority.

I continued to develop my informal and formal authority throughout my residency. The ability to draw from a deepening well of authority made some of my work much easier to accomplish. For example, I was able to avoid some of the common budget process roadblocks because I had the access and credibility with senior leadership members that others did not. My authority also allowed me to feel comfortable advocating a deliberate strategy to the SVP of Strategy & Policy and SVP of Outreach & Engagement of four strategies that the State Outreach team could implement more widely in different districts and states.

However, by January, I became aware that I might have underestimated the formal authority that I had. Additionally, while the amount of authority I had made it easier to do work with the senior leadership team, it was also limiting my ability to effectively work with the staff. I had been viewing myself as a staff member who observed the senior leadership team, but at some point I realized that some staff members viewed me as an actual member of the senior leadership team, which endowed me with significant formal authority. These revelations produced conflicting emotions in me. As much as I appreciated how they allowed me to push work forward effectively, it was also important for me to
understand where I actually sat in the organization. In hindsight, I place myself in the middle; while I focused primarily on trying to engineer the emergent strategy process, the discovery of my formal authority in stage three meant that I could also do some deliberate strategy development in State Outreach team.

Although I placed myself in the middle, it was important that I recognized that my possession of formal authority posed a real danger to the emergent strategy development process. My authority posed a danger to the emergent strategy process because I noticed that people began to defer to me, and I also recognized that my old habit of taking control was reasserting itself. I had to be careful that my authority did not seduce me into taking on work that should be given to staff members and undermine their power to develop and experiment with strategies. Another danger my authority posed was that I would reinforce a hierarchical power dynamic that I had observed between senior leadership and the staff, and that I hoped to reduce as part of creating the conditions for the dripstone column strategy development model to be successful.

In December when I heard members of the State Outreach team express that they wanted to know from their managing supervisors (i.e. SVP of Strategy & Policy and the SVP of Outreach & Engagement) if the strategic plans were a priority, I understood in a new way the importance of formal authority at the National Board. Although working relationships between managing supervisors and their direct reports were strong and collegial, I also observed a tendency of people to defer or seek validation from their supervisors. The deference of staff towards their supervisors was primarily because most of the decision making power resided with the senior leadership team. This created the hierarchical power dynamic I referenced earlier.
Although I occupied a nebulous space between the senior leadership team and staff, once I had gained enough authority, I was treated also as someone to defer to. This hierarchical power dynamic was problematic when I was trying to empower people in an emergent strategy development process. The emergent strategy development process relies on people acting as leaders, but that is extraordinarily challenging if people do not feel confident or authorized and have to check most decisions with their supervisors. If I was going to operate in the middle with formal authority, I had to be sure that I did not further encourage people to look to me for confirmation but that I authorized them as much as I could.

The power dynamic also hindered my ability to give the work to other staff members. Unfortunately, many of my initial tentative attempts to literally give the work back to people were rebuffed. For example, I was surprised how people struggled with the strategic planning document. And I have been repeatedly surprised when I ask my State Outreach team members to take on more active leadership roles within our State Outreach meetings and am met with skeptical, “maybes” or “I don’t know if I’d be good at that.” I struggled to understand the reticence that I encountered from some colleagues to step up in both minor and major ways. Further complicating my confusion was an awareness that my colleagues generally lead assertively in their daily work in the field. I had opportunities to observe that many of the same individuals demonstrated acts of leadership in a different meeting or space. I wondered what it was about the dynamic in the State Outreach team that was not surfacing traits I knew my colleagues had.
This led me to realize that, while I developed my informal and formal authority quite well, I did not practice as much leadership as I had initially assumed. Adaptive leadership is defined as, “mobilizing people to tackle tough challenges and thrive” (Heifetz, Grashow, & Linsky, 2009, p. 14). Analysis of my actions over the course of the three stages helped me see that while I recognized the adaptive work that had to be done, I often did not engage quite as deeply with the adaptive work. In the following section, I explore why.

**Disequilibrium and the holding environment: A self-analysis.**

One reason I believe that I avoided the adaptive work, particularly in the early stages, was because I assessed in stage one that the disequilibrium was high, perhaps almost past the point of productive disequilibrium, and the holding environment of the National Board was not strong enough to contain any more disequilibrium. At the time I attributed it to the leadership transition, but much later I would come to recognize that multiple parts of the organization were in transition, which compounded the effect of the leadership change.

There was one particular incident that happened in stage one that may have had a long-ranging impact on how I approached my strategic project. In one senior leadership team meeting towards the end of July, I was unexpectedly asked to share my impressions so far of the National Board. I spoke quite frankly about my thoughts on the boundaries I observed between the divisions and some other points that I didn’t track in my notes. What I did track in my notes was the blowback that I received because I was caught off-guard by the intensity of the emotional charge leveled at me and the feedback that was both justifying the state of things and criticizing my diagnosis. At the time, I wrote in a reflection about my defensive response about how I “failed to read the room on multiple
levels” (Wong Callisto, 2015, Week 4 Reflection Memo). I do believe that I failed to read the room and I also realize that there were many ways that I could have improved my delivery.

With the adaptive leadership framework, I also recognize that I overstepped the bounds of my authority. Looking back at what I had written about “feeling that this was a safe space to have a direct discourse in this way” and thinking I was wrong, I can see now was that it probably was a safe space, but that I challenged the authority contract in such a way that pushed the disequilibrium quite far. Evidence from my meeting notes illustrates that I did realize at the time that I had pushed disequilibrium because I wrote about how surprised I was that the team abruptly restored its equilibrium to a tolerable level when a member redirected us back to a finance conversation. However, my mistake was in not reading the disequilibrium level before I began to speak and adjusting my delivery accordingly. The meeting prior to my sharing had been very tense. While the emotional charge had seemed to dissipate, I did not realize that calm demeanors could belie that the state of disequilibrium could still remain high. In speaking so bluntly, I was only piling on to the list of stressors the senior leadership was dealing with. Recalling an earlier description of disequilibrium, “there is no call to produce distress for its own sake” but that an adaptive leader has to monitor the levels and maintain distress within the productive zone (p. 35). This adaptive leadership skill of regulating disequilibrium is one that requires ongoing practice.

While in my reflection I wrote that week, “I still stand by what I said,” I can see now that my actions contradicted that statement because I ultimately retreated, uncomfortable with the emotions I had provoked. Consequently, I
believe this single scenario resulted in me pursuing technical work while still talking about the adaptive work because technical work did not stir up quite the same level of emotions as adaptive work. In many ways, it was the wrong set of actions at the wrong time. Now that I have stronger relationships with my colleagues at the National Board and have acquired more authority, I am better positioned to re-engage in adaptive work and mobilize staff to tackle tough challenge lines.

From the example I just mentioned, as well as other moments when I did not pursue adaptive work by pushing the disequilibrium, a lesson I have learned is that the holding environment is often much stronger than I think it is. It is not necessarily that the people in the holding environment cannot or will not engage in uncomfortable conversations, but more importantly, I need to work to become comfortable with the discomfort I am raising. I had cues that the groups I was in could engage more with disequilibrium because on at least two separate occasions my supervisor urged me to “turn up the temperature.” At the time, I believed that I tried to raise the disequilibrium level, but in hindsight I wish that I challenged both myself and my colleagues more. In this analysis, I also found it interesting that my supervisor urged me to push the disequilibrium but did not engage in that practice himself. On an experiential level, I understand much better how adaptive leadership is tough on all participants, the leader included. While timing and pacing are always important, my own ability to practice adaptive leadership is also an important factor in how much adaptive work can be done.

Analysis of my strategic project has revealed that it can be easy to avoid adaptive work, even for a person who is consciously using the adaptive leadership framework to inform their work! As I mentioned earlier, reflection upon the three stages of my strategic project exposed that while I might have been successful with authority, I was less successful with leadership.

My subconscious inclination towards technical solutions is partially explained as a consequence of the scenario I just unpacked in the previous section, but it is also attributable to the easy seduction of technical solutions. The strategy sessions allowed me to lean on my technical experience and familiarity with facilitating adult learning sessions. When the strategy sessions were not going well, it was even easier to focus on the technical components such as designing protocols because I was seeking success, and technical solutions have clear outcomes of success or failure.

However, when I began to let go of some of my ideas of what a “successful” strategic project looked like and started working to have a positive impact on the National Board, I was able to gain a perspective on how to accomplish both technical and adaptive work simultaneously. This shift began to occur in stage two and is reflected by how I revisited the strategic planning template. When I introduced the template in September, I had vague ideas about the way in which it might build the capacity of the staff to develop strategy and create a platform for people to collaborate. More honestly, I had made assumptions about people’s readiness and thought the strategic plans would be a tool to codify all the wonderful strategy and tactical ideas people had. However, in December, I revisited the strategic planning template with a much clearer
vision for how it could be both a technical document to record a plan, but could also be used to encourage some of the empowerment, ownership, leadership, and learning that I was trying to nurture.

Although I did not actually change the template for the strategic plans, I changed how I understood the usage potential. As I mentioned in stage three’s results, I saw how the goals could serve as an entry point to engage staff in how they saw their work. This entry point was the opportunity to engage in technical work of developing strategy (e.g. how to write a good goal) but also coach people on taking on some of the adaptive work (e.g. why is that a good goal?). An example of some adaptive work that I engaged with was getting people to realize that just because they were the writer of a state’s plan did not mean they were the one who had to do all the work in that state. Instead, they should understand their role as leader of a team that would execute the state’s strategic plan. This required them to partner with others both in the field and in the office to do the work. They had to effectively communicate what they hoped to see and support other people to do the work. For many, this was different way of doing outreach because in the past they were the ones both designing and executing all the work. Now I envisioned that they would design and lead others to execute.

The strategic plans could also be a structure to foster learning both individually and collectively. Individually, the strategic plans could be reviewed regularly to reflect what was working and what was not. The entire suite of tools could be used to reinforce the learning from the others, such as how the progress tracker supported ongoing individual reflection by creating a mechanism to sit and reflection the past two week’s activities. At the same time the strategic plans could also be a platform for collective learning through giving and receiving
feedback, sharing the individual reflections of what worked and did not work, collaboratively problem-solving, and revising what wasn’t working in the plans. Thus, using a technical solution like these tools to engage in adaptive work does not always require the tools be changed, but that the usage of them change.

I believe that my newfound ability to braid the technical and adaptive solutions together is what reignited the SVP of Outreach & Engagement’s interest in the plans. Before, plans were just boring plans, but now I could articulate the ways in which they could bring about a cultural shift that she could see was connected to our goals of success in the field and generating successful strategies.

In stage three, I improved upon the braiding of technical and adaptive work even further because several of my other colleagues began to also see the ways in which some of our technical solutions could be interwoven with adaptive work. For example, as I mentioned in the stage three results section, the planning team for State Outreach reassessed the usage potential for the progress tracking tool. We increased the value of the tool from a compliance recording tool to a tool that made work transparent, and fostered collaboration and learning.

While I still did not go nearly as far as I wished I could have with the adaptive work, I began to find my way back by learning how to braid technical and adaptive work together. While I found engaging in adaptive work directly more daunting at first, the braided approach was much more accessible for me at this stage of my development as an adaptive leader.
Disequilibrium and the holding environment: Organizational analysis.

Although I could recognize that the disequilibrium level was high when I began my residency, I still persistently underestimated the level of disequilibrium the organization was experiencing. As I alluded to earlier, it took me much longer to realize that it was not just the leadership transition that had raised the level of disequilibrium, but several other core elements of the National Board were undergoing change. The October and November strategy session meetings are examples of moments when I underestimated the level of disequilibrium the staff were experiencing. At the time I could not understand why my plans were not translating into successful activities in the meetings. Now I recognize that the activities did not unfold as I planned because they had activated latent points of disagreement. When our conversations went into unexpected directions, I did not recognize that some members of the group were signaling their high levels of disequilibrium.

In my time at the National Board I saw tension lines around two major points of disagreement. The first tension point was about how resources, particularly money, influence and shape the work. This tension point was illustrated internally in the way the National Board strove to create a viable business model for their altruistic work, but also externally in our advocacy for policies that essentially rewarded teachers for achieving board certification with financial stipends. The second tension point was around the ideological shift from scaling candidates for board certification to scaling accomplished teaching. While people voiced their support for scaling accomplished teaching, making the strategic changes (i.e. behavioral changes) that accompanied this ideological shift was much harder to embrace.
One specific illustration of the tension that came from shifting from scaling candidates from board certification to scaling accomplished teaching is how people both at the National Board and in the field reacted to the substantial redesign of the certification process. The redesign focused on increasing access to board certification by creating four components that could be taken separately, in any order and over more than a year. However, these changes created an adaptive challenge as some people struggled to accept the changes and the implications they had for many other long-standing practices. For example, those who valued board certification as an elite and exclusive process reacted to redesign opening access to more people because open access and more NBCTs threatened those very values that they held in board certification.

The adaptive challenge of the assessment redesign was compounded by the dip in the number of candidates, which could be logically explained because of the staged way we rolled out the four components of the assessment. But against a trend of declining candidate numbers and a corresponding impact on revenue, it is easy to see how challenging it would be to hold steady and not give way to anxiety. Add to the mix the introduction of a new resource (i.e. ATLAS, the case library) that had its own attendant adaptive challenges, and the conditions were ripe for extremely high levels of disequilibrium.

Another factor that impacted the disequilibrium level at the National Board was that the president and CEO still needed to earn informal authority within the organization. Despite beginning as the Executive Vice-President six months prior to stepping into the interim and then permanent president and CEO role, she was still a relatively new entity and now occupied a different, critical role in the organization. Without a clear authority figure at the National
Board, the state of the holding environment was uncertain. The holding environment held through the transition because of the pre-existing strong horizontal bonds across the organization and the vertical ties between the senior leadership team and the staff, but the absence of a clear authority figure managing the holding environment meant that it weakened. Thus, disequilibrium was very high and the holding environment potentially fragile.

One of the ways that the disequilibrium clearly impacted my strategic project was the way that stage one and two unfolded. Notably, the process of finding my way to a project rather than having it defined for me was a consequence of the senior leadership team having to prioritize shepherding the organization through this transitional time. Yet, I believe it ended up being the best process for my residency because it taught me how to sit with and move through uncertainty and ambiguity. I learned that progress and certainty are capricious. I also believe that this organic process resulted in the best fit match between my strengths and interests with the National Board’s needs.

My struggle to define my strategic project interestingly mirrored the broader challenge of the National Board which was also trying to find its way forward through uncertainty. Therefore, it is likely that the process of developing my strategic project also influenced my thinking on developing a model for strategy development. I lived through the experience of being in an uncertain space without a clear pathway forward and persisted through by authorizing myself to take forward steps, celebrate progress, and learn from my mistakes. The result was that I articulated my own strategic project that has continued to engage, challenge, and push me at the edges of my learning. I believe the experience of going through that project development process shaped my
conviction that an emergent strategy development process is appropriate for the National Board.

However, I had a framework and a skill set to be able to engage in a process the required me to tolerate high levels of disequilibrium. I was comfortable being my own authority figure and authorizing myself, but as I described earlier, I observed that many of the staff members on the State Outreach team were not comfortable being self-authorized. Therefore, my strategic project sought to create conditions in the State Outreach system like skill-building, establishing processes for intentional learning, and giving staff more of the work and decision-making power so that team members on the State Outreach team would feel more empowered and authorized.

Authority and leadership: Organizational analysis.

The leadership transition muddled authority and leadership at the National Board. As I write in the previous section, the impact of this confusion is seen in the level of disequilibrium and state of the holding environment, and it caused me to wonder who is responsible for the holding environment in a transition? I believe that amongst the senior leadership, it wasn’t clear if it was the interim president and CEO, the senior members of the leadership team, or some other configuration. Perhaps if there had been clarity on this point, staff disequilibrium might have been better regulated or at least not exacerbated, which would have resulted in conditions might have been even better for my project.

I believe that the lack of clarity at the top not only had implications for the holding environment but also resulted in orientation issues. People looked to
senior leadership as the weathervane to the organization. Senior leadership can orient people as well as serve as indicators of fair or foul weather. As the senior leadership team worked through some of the deliberate strategy development processes and other challenging concerns that had emerged in this transition period, they kept information close to the vest. After several months of observing this, I became concerned that the failure to communicate had not gone unnoticed by the staff. Furthermore, the lack of information flow downward from the senior leadership team meant that, with that absence, people’s imaginations were left to run rampant to fill the void. Not only did the anxiety not help progress on my strategic project, but progress was also hindered by the lack of orientation because I did not have the authority to orient people in the State Outreach team alone.

The senior leadership was also affected by the disequilibrium and there were several consequences from this. The first was that the disequilibrium redirected much of the senior leadership team’s capacity to conduct some of the business as usual. They understandably withdrew from some of their managerial responsibilities to focus on the bigger organizational picture. I was well aware of the broader context of what senior leadership was tackling and this made me both understand and empathize with their overfull plates. They were not only forced to prioritize and triage, but we still had not filled the Executive VP role so I assume that the senior leadership team was shouldering more work. Despite understanding and recognizing that their choice was likely correct, there were still tradeoffs. Taking the plans as one example, they were unable to provide feedback to the plans which communicated to the staff that the plans weren’t important. Budgets were drafted and then went weeks without notification of
whether they were approved, leading to a period of time when no money was spent. Without more managerial oversight, some old patterns of behavior perpetuated: people worked very hard on their own, made their own calls on what they thought was best, but often felt uncertain and isolated in their work.

The disequilibrium also exacerbated the hierarchical power dynamic I highlighted earlier. Because some staff required so much authorization from the senior leadership team members, it often pulled senior leadership too far down into the weeds of work. In this time of transition, the power dynamic seriously constrained everyone. Senior leadership team members were exceptionally busy and overtaxed, making them even less unable to maintain this power dynamic while staff members were even more uncertain because of the disequilibrium and turning to the senior leadership even more for guidance and direction. As I mentioned in the RKA, part of adaptive leadership requires changing the perception that leadership is problem-solving. Senior leadership was doing too much problem-solving for their staff members.
Implications for Site

The dripstone column model of strategy development re-conceptualizes two strategy development processes described by Christensen and Raynor (2003): deliberate, which is top-down and best used when a winning strategy is known, and emergent, which is bottom-up and best used in an adaptive situation when the right strategy is unclear. In the dripstone column model, the senior leadership of the National Board mainly provides strategic guidance, direction, and priorities. Guided by this strategic orientation from senior leadership, staff participate in an emergent strategy development process that capitalizes on their expertise on salient issues and solutions in the field. Together, everyone at the National Board has a shared responsibility for the strategy development of a next-generation strategy for scale.

Stalactite Growth

Leadership has a critical role in the strategy development process to generate a suite of next-generation strategies for scale. However, the dripstone model requires the senior leadership team to re-conceptualize their leadership from being solely responsible for developing strategy to sharing responsibility. Additionally, in this time of transition, the staff at the National Board especially look to the senior leadership team for orientation and the communication of clear and concrete strategic parameters would provide both guidance and reassurance to the staff.

A place to begin is answering the JTBD strategic questions that I outlined in my review of knowledge for action. Below I offer thoughts on these questions based on some learning I have taken away from my strategic project. The process
of my strategic project development – the funnel, focus, and expansion – offers lessons that might be applicable at an organizational level. For example, there is value in focusing on clearly bounded and specific areas because focus does not mean simplification of the work.

1. Who are the National Board’s customers?

If the National Board wants to go to scale, shifting from individual teachers towards stakeholders in the education sector who can mobilize groups of teachers seems like a strategic choice that should be considered. Shifting to stakeholders like principals, state and district leaders, policy makers, etc. seems like one way to cross the chasm with teachers. This new targeted segment of customers is actually quite large, particularly when one considers the entire pipeline that produces teachers.

Some key stakeholders that seem logical to start with are teacher preparation programs and school leaders. Focusing on teacher preparation programs would allow the National Board to seed the teacher pipeline with candidates that are ready for the process when they are able to begin the certification process (i.e. after three years of teaching). Choosing between state and district leaders, and school leaders was difficult but I think the National Board’s return would be higher with school leaders than district leaders. As just one example, I considered that some large districts are moving towards portfolio models which places greater autonomy at the school level.

2. What are the jobs to be done for the customer base? Which of these jobs can the National Board can do?

It is presumptuous of me to determine the jobs to be done and I suggest that the National Board spend more time understanding the problems and needs
of its chosen customers. One of the challenges of being a mature organization is that people become wedded to core work like our board certification process such that they sometimes approach the work backwards – starting with our solution and trying to match it to a problem that they see in the field – rather than identifying the most salient problems in the field and identifying ready matches with our suite of resources.

As the National Board has grown, it has also adopted a wider scope of work. The second question here asks the National Board to choose what to do and what not to do. In defining strategy, Childress (2004) also outlined that strategy is about making choices and a choice not to something is just as important as choice to do something. An example of a job where I believe the National Board could consider partnering with others and letting them do the job is policy. This does not mean policy work is not valued because I do think it is critical for the scaling accomplished teaching, but I wonder is policy work a job that the National Board is best suited to do?

3. How will the National Board do that job for their customers?

Continuing on the theme of partnering, one direction that I see the National Board moving towards is doing less of the direct work, but leveraging its power to convene, network, and develop others while elevating best practices. The National Board can still do some targeted, direct work in the field, but I think that the fastest route to scale is to mobilize and give the work back to partners. The National Board has actually seen this strategy emerge effectively in Washington state in how they recruit candidates using an ambassador and “snowflake” model. In essence, I believe there are ways that the National Board can form a macro dripstone column with the field.
In consideration of the “how,” another point where the National Board might want to consider narrowing their focus is on the teacher career continuum. Figure 5 below depicts the National Board’s conception of a teacher career ladder. This career ladder imagines a developmental pathway from becoming a teacher to leveraging one’s earned expertise.

![Figure 5: The National Board's Teacher Career Continuum](image)

While I agree with the National Board on the necessity of building this teacher career continuum in the American education system, I also think it is too much for the staff to work on the entire continuum at this point in time. Work must be paced to ensure success and sustainability. Currently, I am not sure that the focus on teacher leadership provides us with the same kind of potential to scale as the other parts of the continuum. Teacher leadership has appeal because it is in vogue and thus offers relatively easy entry points for the National Board. However, in light of our vision to scale accomplished teaching and board certification, is going after teacher leadership initiatives the highest leverage point just because it’s easy? The National Board might consider focusing on early teachers and those who are eligible for board certification.

As a small national organization, another “how” that senior leadership might consider is the strategy of geography. Because the American education
system is so decentralized, focusing on a more limited set of geographic areas and finding sustainable models may be better than the relatively dispersed and discrete approach the National Board currently has. This does not mean that other work cannot go on in other places in the country, but I hypothesize that concentrating resources (e.g. staff, money, time) on a few areas might yield more systemic, successful, and sustainable strategies. This approach also begs for more cross-functional collaboration. What does a “new National Board” presence look like in a system that incorporates our standards, ATLAS, and board certification and embeds them in an environment with supportive policies, key partnerships, and a burgeoning network of NBCTs?

Part of the challenge is that the National Board has to identify and work within the limited authority it has in the wider field. If the organization focuses on a few areas, it can become an expert in that local context, establish the relationships and partnerships it needs to address the complex education system, and focus on building its authority in that region. Regardless, the National Board has to determine the role it will play in creating a transformed interdependent system for accomplished teaching. On these decisions, senior leadership should lead, but there is a wealth of knowledge in the organizations around partnerships and presence (e.g. communication, outreach). Whatever role the National Board decides to play, it must ensure that it has an entrenched, visible, and valuable role in the system reform. As these deliberate strategy decisions are made, it will likely be painful and challenging because choices will be made to stop or reduce work that may have a long historical legacy and that many love. Leadership must be prepared to hold steady through people’s denial, anger, and resistance.
Finally, the deliberate strategy development process requires improving the vertical communication from the senior leadership team to the staff. Communication is critical because the costs of ineffective communication include confusion, avoidance, and subtle but subversive dissent. Most pragmatically, improved communication will facilitate transmission of deliberate strategy decisions as well as other kinds of relevant information. I have heard from staff that the previous president and CEO of the National Board did an excellent job communicating the vision of the work and people could recount the vision readily, but now staff require more orientation towards strategic guidance to let that vision effectively inform their work.

Deliberate strategic priorities and direction should ideally be relayed from the entire senior leadership team to all of the staff. In my time at the National Board, I have seen communication come from individuals on the senior leadership team, but rarely from the senior leadership team as a unified group. It would send a powerful message if the senior leadership team communicated more as a body. Following such unified communication, senior leadership members could reinforce and relay specific information to their divisions. Just like dissolved limestone drips downward to create stalactites, information should flow from the top to build the foundation for the top-to-bottom strategy development process.

There are other benefits to improving vertical communication, such as helping to empower and authorize staff. Currently, I believe that the senior leadership team withholds some communication as a way of protecting staff from stress, but this has negative consequences for all parties involved. The senior leadership team has to hold all the stress within themselves and they
inadvertently can be communicating a lack of trust in the capabilities of the staff to share the emotional load. The staff still feel some of the stress, but without answers, their imaginations fill in the gap with worst fears. I suggest that as part of building the dripstone column, senior leadership invite the staff to take on more collectively responsibility for the organization. The first step is careful communication of some of the challenges the National Board currently faces.

**Creating Dripstone Columns: Meeting in the Middle**

If the National Board is going to continue to operate at its current organizational capacity, the senior leadership team should consider how it utilizes middle management. This likely does not require any additional resources (e.g. hiring more people) but rather re-conceptualizing the roles that already exist. The National Board is fortunate that it has unusually excellent staff equitably distributed across the organization. I believe there is untapped capacity that the National Board could benefit from drawing upon.

The hierarchical power dynamic that places so much reliance on senior leadership can be buffered by middle managers who could provide some of the authorization to their colleagues. However, these middle managers must be invested with the authority they need to be able to make autonomous decisions. Across my residency, I have heard several comments expressing that very little decision-making power resides below the senior leadership team. If communication is improved vertically, more decision-making power is delegated to middle managers, and senior leadership provides high-level oversight, I believe that staff will feel more empowered to move work, work will move
faster, and senior leadership will be released from some of the dependencies that are constraining everyone.

**Stalagmite Growth**

I also continue to be convinced in that an emergent strategy development process is essential for the strategic renewal the National Board needs. I believe that the next-generation strategies for scale will come by a creating a myriad of strategy and tactical experiments across the country and studying what works. The most efficient way to do this is not to have senior leadership generate these ideas, but to cultivate them from National Board staff and even partners in the field.

I suggest some activities that will support the effectiveness of an emergent strategy development process:

1. Make strategic planning transparent and dynamic (i.e. keep the plans alive).
2. Connect strategic planning with resource management (i.e. conduct quantitative and qualitative assessments of whether activities are producing results; examine return on investment to ensure money spent on activities is producing results).
3. Study and reflect upon the results with discipline (i.e. not “we think it works”); we have resources in the office that can be leveraged: The Network to Transform Teaching’s improvement science is brilliant; there is also a whole division in the office that is comprised of experts in…assessment!
4. Create space for learning: Staff need coaching, mentoring, and developing – ideally from middle managers or more experienced staffers and the senior leadership team (i.e. a tiered system of support) – and they have proven themselves eager to learn.

5. Create a process that codifies lessons learned and ensures that institutional memory and learning do not just reside within the current staff members, but get passed on and used.

6. Analyze the organization’s culture, processes, and routines critically and decide what needs to stay and what needs to go because people need work taken off their plate if we are going to give them more responsibility for strategy development.

Finally, for all of the above activities, that National Board should remember to consider the full usage potential. How can a technical process be leveraged to tackle difficult, meaningful problem-solving work and have rich, complex conversations?
Implications for Sector

Leaders Disappoint

I recognize that this is a provocative heading, but my reflection on my residency has made me consider the ways in which I was primed to be critical of leadership. The top positions in any organization or institution, whether the title is president or principal, invite judgment from a myriad of stakeholders. However, I learned in my analysis that sometimes the question is not about whether leaders have made the “right” or “wrong” decision but whether they’ve made an understandable and wise decision as there are always tradeoffs. These tradeoffs mean that leaders often disappoint because they cannot possibly choose everything. And often bystanders such as myself are quick to criticize their decisions.

I believe that it is time for stakeholders to renegotiate our expectations of education leaders because we have come to demand miracles. In adaptive leadership, authority is a social contract wherein “Party A entrusts Party B with power in exchange for services” (Heifetz, Grashow, & Linsky, 2009, p. 24). Over time, as American mythology about education’s power has grown, correspondingly our expectations about what education leaders can do has also expanded. All parties are at fault in creating this situation.

Education leaders play a role in reinforcing this dynamic because they have bought into what Williams (2015) terms “big man leadership” where leaders are heroic problem-solvers (p. 18). Speaking from experience, I know that it feels good when people look to me to solve their problems, and I briefly wrote about experiencing that seductive pull in my analysis. However, Heifetz and
Linsky (2002) point out that “when people look to authorities for easy answers to adaptive challenges, they end up with dysfunction” (p. 14). Thus, work must be done by leaders themselves to re-imagine an authority contract where they do not have all the answers and solutions. My strategic project and thinking around the dripstone column theory of strategy development has helped me personally expand my understanding of leadership. Leadership does not always provide answers, but should provide direction. Leaders communicate information that orients their staff. By crafting the conditions and nurturing the right culture (i.e. the holding environment), they empower their staff to share the work and in the process capitalize on the strengths and expertise of the individuals around them.

Stakeholders are also at fault in this cult of heroic expectations. In times of anxiety and uncertainty, we look to our leaders to not just orient us but to carry us through the uncomfortable ambiguity. When times are certain, we still expect education leaders to be responsible for tackling outrageous problems: racial and socio-economic achievement gaps, resource disparity between schools, the school-to-prison pipeline, and more. When education leaders are not successful in addressing the small and large challenges before them, the response is often public and unforgiving: complaining at school board meetings, critical letters to the editor, efforts to remove people from their offices and schools. Stakeholders can begin by being more curious and less condemning when leadership disappoints us. They could ask themselves: “What choices did this leader make and what were the tradeoffs? Did they make an understandable and wise decision? Are the consequences of what disappoints us ones that we can or cannot live with? Who else is responsible for this disappointment?” Then, stakeholders should figure out ways in which everyone can share in the work.
Heaping ever increasing expectations upon schools and education leaders without offering any support just reinforces the dynamic where education leaders disappoint and stakeholders experience frustration.

The dynamic of leadership disappointment exists in microcosms (e.g. to a small degree, at the National Board) and macrosoms of the education sector. The dripstone column theory of strategy development calls upon drawing leadership and staff together in a way that all share responsibility for the work, rather than relying on leadership to have all the answers. Initially the renegotiation of this authority contract is likely to be disappointing and frustrating, but ultimately I suspect that all parties will become empowered.

**Dripstone Columns**

I also can see a need for a dripstone column approach in the sector. I think about the ways in which an interdependent, top-to-bottom process can be applied in education. We might see the creation of top-to-bottom systems in individual schools, but at a system level that happens less often between states, districts, and schools. Currently there is a distrust of schools’ abilities to provide quality education. Our present approach is to double down on increased oversight and accountability. Applying my dripstone column model, I would suggest that states and districts step back and reconsider the role they ought to play vis-à-vis schools. Education likely needs to rely more an emergent strategy because we have not found the winning strategy that we can successfully replicate across schools. So the question I ask is: How can we give more schools autonomy while ensuring they can be successful? My suggested response is: the federal government, states, and districts can provide strategic oversight and guidance while schools engage in an emergent strategy development process.
The Every Child Succeeds Act offers the education system a unique opportunity to recast itself in this form.

**Mind the Gap**

Bringing about any change in the education system will require more engagement with adaptive work if we are to see impactful transformation of teaching and learning. To focus on just one example, the dripstone column model requires leadership and staff members to grow and change. Just like real stalactites and stalagmites, dripstone columns form over time and that growth cannot be rushed. Figure 6 illustrates that for quite some time, a gap will exist between the stalactites and stalagmites.

![Dripstone Columns and Adaptive Work](image)

This gap requires adaptive work, particularly ensuring that the holding environment is strong enough to support people through a sustained period of uncertainty and disequilibrium. People desire the security of certainty and being patient to sit through a persistent gap in a process until that gap can close into a solid mass is taxing. As an example, in education, there are new initiatives or
programs introduced seemingly every year. I see this as evidence that we lack the tolerance to sit with uncertainty and disequilibrium long enough to see solid results. However, if the dripstone model is to be successful, people will have to sit through the slow process of growth in both the leaders and the staff before the whole is built.

However, people naturally have a variance in their ability to tolerate disequilibrium. This variation can be leveraged to an advantage for dripstone column building. In the Implications for Site, when I reflected on the JTBD questions, I consistently emphasized focus and restraint. While general focus and restraint is beneficial for all, for those few individuals with high tolerance for uncertainty, a different course of action is recommended. In the past I have outlined a strategic approach for the National Board that creates lanes of the types of strategic work: maintenance, refinement of successful tactics, and experimentation with radically different approaches. Appendix D is a slide deck where I did my initial drafting of this thinking on strategic lanes. I conceived this approach because I wanted to meet people at their readiness for adaptive work. I also did not want the National Board to throw all its eggs in one strategic basket. I believe that taking a differentiated approach to the adaptive work required in building the dripstone columns will allow some people to drip and contribute to the growth of a dripstone column at their own rate.
Implications for Self

The first two years of the Ed.L.D. program provided me with the knowledge base and development to demonstrate a very different type of leadership in residency than was my default prior to the program. Still, the challenge of trying to put my new leadership ideas in action during residency caught me by surprise. I felt like a wobbly new thing, taking its first tentative steps. It was uncomfortable for me to try to go from the aggressive disruptor I was proud of being to practicing the ways of a compassionate builder. My discomfort highlighted for me that although I had been seeking for years to return to the experience of my first school’s leadership team – a culture of shared leadership, collaboration, collegiality, and tremendous learning – my time in different environments had hardened different attributes of leadership in me: loner, controlling, inclined towards criticism and skepticism, and possessing an overconfidence in my own ideas. I am thankful that I had this space to practice and reflect upon the leader I am working towards becoming.

Sitting with Ambiguity

As the “aggressive disruptor” I call myself, I once prided myself on my ability to quickly assess a context and take dramatic action. As part of my entry into residency I had deliberate intentions to spend more time in the diagnostic space and restrain my natural tendency to hurdle into taking action and making changes. I achieved that with my five-week observation period of shadowing the senior leadership. In the observation period, I felt in control of my experience and thus felt relatively little discomfort. But beyond the observation period, the broader situation at the National Board amplified my experience of ambiguity.
because I could not anticipate or control what happened. Aware that my aggressive and disruptive style of leadership would not be ideal in my current context, I was further unmoored.

I found stage one of my strategic project (i.e. July through November) to be very challenging because I faced the most ambiguity in that stage. Throughout the highs and lows of the strategy sessions, I experienced an undercurrent of uncertainty. As a decisive diagnostician, this uncertainty was a foreign and uncomfortable feeling. As I wrote in my stage one results, I was frustrated that my work felt “reactionary” (p. 50) rather than oriented to a plan. Now that I am on the other side of that experience, I empathize with my uneasiness but appreciate that I was so uncomfortable. I would not go so far as to say that I am comfortable with ambiguity, but I now know that I can sit with it.

The experience of sitting with ambiguity showed me how I have become over-reliant on my planning strengths. In special education, the skill of anticipating and preparing for multiple avenues of a conversation is a tremendous asset, but while seven years of using this skill had made me an excellent facilitator, it had also introduced a rigidity to my thinking. As much as I was discomfited in my first five months at the National Board, that experience went a long way towards reminding me of the value of flexibility and that I could not always have a plan with all the contingencies for every possible situation. Embracing ambiguity allows me to have more forgiveness for myself when I do not have a full plan or all the answers. The funnel approach showed me the value of approaching new situations with an open stance, being patient, and allowing an organic process of discovery to take over.
My experience sitting through ambiguity also allowed me to feel empathy for my colleagues at the National Board. This empathy helped me to see the parallels between their experience of disequilibrium at the National Board and my own. The ability to use myself as a reference case for my work was a fascinating component to my residency. From my meta-analysis I understood the important role that reflection and analysis played in helping me tolerate the discomfort of ambiguity. While I have always considered myself a reflective practitioner, I especially leaned on reflection and analysis as sense-making processes to try to find meaning in the mess. Knowing that I had this capstone to write helped me create rituals and processes to reflect and analyze. Going forward, I will have to apply this same intentionality to maintain these practices. Overall, sitting through ambiguity has taught me lessons that expanded a repertoire of approaches that supplement but do not supplant my aggressive disruptor style of leadership.

**Binary and Plurality Orientations**

One way that rigidity expressed itself in my thinking was my tendency to see binaries. As someone once prone to quick, decisive action it makes sense that I tended to order the world as clean either/or decisions. This is not to say that I didn’t recognize an array of options, but that my proclivity was to order the world into a series of neat choices. In my last position, I was fond of telling people that I enjoyed encountering gray situations because they offered the opportunity to push them into black and white.

As I sat through ambiguity at the National Board, my first instinct was to seek order and turn that gray to black and white. For many reasons, I struggled
to do this and I was frequently frustrated. Now that I had my new knowledge base, for the first time I had encountered an adaptive challenge that I could not trick myself into making a technical problem. Thankfully, I had the support of executive coaching that helped me unpack some of the reasons that I was so attached to a binary orientation to the world. More importantly, this coaching helped me discover the wisdom of learning to stay present, appreciate plurality, and find a middle way.

My ongoing practice of taking a plurality orientation to the world significantly impacted my work. The most obvious impact is the development of the dripstone column model of strategy development. In stage two I was increasingly convinced that even if I achieved the best result from my work as a resident, the strategy development would still be stalled because a piece was missing. I revisited my theory of action and felt that I had to include a role for senior leadership. From there, I extended that thinking to my idea of strategy development and ultimately arrived at a model that relied on both senior leadership and the staff. The dripstone column model of strategy development rejects a top-down or bottom-up binary and instead embraces both for a top-to-bottom approach.

This is not to say that I now see the world only in pluralities because my binary orientation is very strong. However, I continue to work on catching myself when I’m seeing the world through a binary orientation and I have some helpful accountability partners that support me by catching those moments I can’t identify myself. In those instances, I prompt myself with the question, “Is there a middle way?” and I’m forced to consider expanding my view of a situation to be more complex and nuanced.
Being Curious about Different Perspectives

One of the most beneficial outcomes from the five-week shadowing period in stage one was understanding that I needed to be curious about different perspectives. I had the unique opportunity to see how multiple perspectives viewed the same situation, such as a tense moment in a meeting, and this made me realize that the best understanding of situation could only come after hearing from all the perspectives. The practice also includes a scrutiny of one’s own perspective and being able to examine it in the same way. It is through understanding each perspective that you can make the best diagnosis.

Prior to my residency this was not a practice I engaged in often. It’s a lot easier to stick to people you resonate with than to be curious about the people who confuse, annoy, or anger you. I can still recall the check-in with my supervisor when he asked me whom I spoke to most often; after I named them, he gently suggested that I engage a wider variety of people. This comment first annoyed me, but it has really stuck with me. In time I have come to engage with a much wider variety of people at the National Board. I have learned to practice appreciation for perspectives that are different from mine, to be curious when I do not understand them, and to examine my own reactions of confusion, annoyance and anger. This practice has tremendously helped my ability to do my work because I better understand when and why I meet resistance.

Still, residency highlighted how hard it is to do this perspective gathering in practice, when real life feels like stepping into a stream, and sometimes like the raging waters of a stream after a flash flood. I had to learn to not think of understanding context and diagnosis of a situation in a static way, but as dynamic. People change, situations change, everything is a moving target, and
understanding can seem elusive. While it was frustrating to take a step and feel like the ground was completely shifting and things were unexpectedly blowing up left and right, I think it has helped me develop a practice of more empathetic leadership. I have to work much harder and be mindful about talking to a wider variety of individuals. Managing change is ultimately managing people’s emotions. Managing people’s emotions requires getting to understand them and to empathize with them.

**Moving from Self to Organization**

Earlier in this capstone, I described three stages of the strategic project. These three stages also reflect an evolution of my own understanding of what leadership meant for me in residency. I found that it was deceptively easy to default to my comfort zone in planning the strategy sessions in stage one because the task catered to my natural strengths and preferences. I acted as largely a solo actor and found myself grappling with a strange sense of possessiveness over “my” strategic project. Thankfully, the struggles of October and November helped me recognize that even if I was successful in execution, I had a high likelihood of retreading the same patterns that brought me to the Ed.L.D. program: successful outcomes that lacked sustainability because I built systems centered on myself. Part my maturation as a leader was moving from an egotistical point of view to an organizational one. Recalling that my intention for residency was experimentation and pushing my own challenge line led me to step forward into the second stage of the strategic project committed to a style of leadership that was less self-serving and sought to be deeply context-relevant and impactful. As I mentioned, making the shift from having a successful
strategic project towards working to have a positive impact on the National Board opened up the work for me in new ways. For example, narrowing the group I focused on for my strategic project allowed me to spend more time building relationships and learning about the culture, politics, and dynamics of a somewhat established group.

Furthermore, I learned to share work as a leader. In hindsight it’s ironic that I had the outcome of strengthening internal and cross-functional collaboration from the launch of September’s strategy session but did not apply it myself until the second stage of my strategic project. Leaders can have some pretty wide blind spots, but I am thankful I uncovered this one in time to benefit from the learning it produced. I found working in partnership to be both comforting but also frustrating. “Big man leadership” often means your chief counsel is often your own judgment, and this is a fairly easy and expedient mode of operating. The addition of partners complicates and slows down work. I benefited from not being isolated, being pushed on my own thinking, and hearing my partners’ ideas. I may not have always appreciated being accountable to a partner and may have been frustrated by the challenge of trying to be patient, authentically listen, and communicate my own ideas clearly, but I knew I needed to practice the skill of truly partnering with others. One of the hardest skills I had to practice in residency was letting others demonstrate their own acts of leadership due to my own desire for control and my longstanding developmental goal of judgment. I am lucky to have found so many wonderful partners at the National Board.
Conclusion

The development of my strategic project through its three stages presents an interesting case study for how an organization in an ambiguous state of transition can navigate towards strategic clarity. Approaching ambiguity with curiosity and an open mind, stage one describes the funnel approach I took to learn about my context so that I could focus on an entry point for strategy development. Stage two brought clarity, a definition of a strategic project, and a theory of action that connected my residency work to the larger goal of developing a next-generation strategy for scale for the National Board. The clarity of stage two granted me an ability to understand greater complexity and take on a more system-level perspective of my work. The expanded perspective marked stage three and allowed me to take on more complicated, interdependent work to better establish a coherent strategic planning and learning system. Visually I represented these three stages as shapes and taken together they form this figure:

![Figure 7: Macro to Micro to Systemic](image)

In the course of navigating through these various stages of ambiguity, clarity, and complexity, I refined a model of strategy development for the National Board that required deliberate strategic guidance from the senior
leadership and an emergent strategy development process from the staff. I called my articulation of this top-to-bottom model a dripstone column model because dripstones columns are formed when stalactites, growing down from the ceiling, and stalagmites, growing up from the floor meet. It is a happy accident that the three stages of my strategic project development happen to also look representative of a dripstone column, with a stalactite and stalagmite.

In addition to articulating a model of strategy development for the National Board, my strategic project also focused on establishing the conditions for an emergent strategy development process. As a resident, I was mindful to undertake a scope of work for my strategic project that would allow me to have meaningful impact on the organization. The ten-month residency experience is brief, in fact, the lived experience of it is shockingly short but I believe I still had meaningful impact. Towards the end of my residency at the National Board I can point to my impact in the creation of the State Outreach planning team, the qualitative and quantitative improvement of collaborative and learning conversations on our team, and the adoption and use of a suite of tools that support the strategic planning and learning system.

I believe the National Board is better positioned to come up with a suite of next-generation strategies for scale than it was in July. I have been surprised by how quickly work can move when the conditions are right. The partnership of senior leadership’s use of a deliberate strategy development process and an emergent strategy development process with the staff offers rich opportunities for the National Board use the potential locked into its personnel. In the dripstone column model of strategy development, everyone has a role to play.
However, in my implications for site I outline several recommendations that will increase the adoption and success of my proposed strategy development model. As I learned in my own experience developing my strategic project, clarity is illusory in its permanence and progress is capricious. The National Board should continue to focus on its strategy development process in the effort to design new strategies for scale. Developing a suite of next-generation strategies for scale and ensuring that everyone can clearly articulate and take actions in alignment with them should be the key priority because strategy is what will position the National Board to be a leader in the education sector for the next 30 years.

I acknowledge that undertaking this strategy renewal in this time of change and transition is challenging, but ultimately I believe that strategy development cannot be lost in the turmoil. It is seductively easy in transition to react to the ambiguity by turning with laser focus on the urgency of the now. However, it is a critical discipline of leaders to hold steady in these moments and still step back to determine and communicate strategic direction and priorities. Leadership is responsible for the holding environment, and it is through their cues and communication that staff members will proceed through the change. There is a lot of work that is required, but in the same way that stalactites and stalagmites must grow over time in order to form dripstone columns, the National Board can continue to grow and hopefully will become more united and stronger in the future.
Bibliography


Appendices

- Appendix A: Growth of NBCTs Across Time
- Appendix B: Strategic Project Chronology of Key Events
- Appendix C: Strategy Session Agendas
- Appendix D: Thinking About Strategy
Appendix A: Growth of NBCTs Across Time

Cohorts of New NBCTs Across Time

[Bar chart showing the growth of NBCTs across different time periods, with the number of new NBCTs for each year from 1992 to 2015. The chart indicates a general increase over time, with peaks in certain years.]
Appendix B: Strategic Project Chronology of Key Events

Phase 1: Mapping
• July 1, 2015: 1st Day of Residency
• July 6, 2015: Actual Start to Residency
• Week of July 13: Shadow SVP of Strategy & Policy
• Week of July 27: Shadow President and CEO
• Week of August 3: Shadow SVP of Outreach & Engagement
• August 7, 2015: First meeting where SVP of Strategy & Policy and SVP of Outreach & Engagement; Introduction to idea of “strategy session”
• Week of August 10: Shadow SVP of Standards & Assessment
• Week of August 17: Shadow VP of New Products/Innovation

Phase 2:
• September 16-17, 2015: September Strategy Session

Phase 3:
• Week of September 28: Return to Campus Visit I
• October 14, 2015: October Strategy Session
• October 15, 2015: State Outreach Meeting
• October 21, 2015: State Outreach Meeting
• November 3, 2015: November Strategy Session
• November 4, 2015: State Outreach Meeting
• November 18, 2015: State Outreach Meeting

Phase 4:
• December 9, 2015: December State Outreach Meeting
• December 15, 2015: December Strategy Session

Phase 5:
• January 21, 2016: January State Outreach Meeting
• February 11, 2016: February State Outreach Meeting
• February 24, 2016: February State Outreach Meeting
• March 9, 2016: March State Outreach Meeting
• March 24, 2016: March State Outreach Meeting

Future Dates:
• April 13, 2016: April State Outreach Meeting
• April 27, 2016: April State Outreach Meeting
• May 11, 2016: May State Outreach Meeting
Appendix C: Strategy Session Agendas

1. September 16, 2015
2. September 17, 2015
3. October 14, 2015
5. December 15, 2015
In the spirit of learning, we’ve created a “learning agenda.” If you go to the Review tab and select “Simple Markup” then you’ll see many comment bubbles on the right hand side of this document.

These comment bubbles provide additional resources, context and allow you to interact with the content of this agenda as you want.

Don’t want all the distracting bubbles? Go back to that Review tab and select “No Markup” or “Original”
Learning Agenda: Home Week
Version: September 15, 2015

We come together with an overall purpose of scaling board certification and accomplished teaching. We have a specific focus on how we can better capitalize on opportunities in school systems (e.g., schools, districts, states, and universities) that surge progress across the continuum in 2015 and 2016.

We’ve set the following high-level objectives for our 2-day Building Demand strategy session:

- Ground ourselves in our vision for the profession and how we can bring it to reality over the long term
- Introduce systems level thinking as the approach to our work and apply that to our 2016 planning process
- Engage in cross-functional collaboration to benefit from multiple perspectives and shared learning
- Launch intentional learning structures and processes to continue learning both within and between teams.

More specifically we will:

1. Strengthen knowledge of current National Board initiatives across the continuum to build a common, shared foundation of understanding.
2. Deepen our familiarity of resources the National Board has that can strengthen teaching.
3. Identify the value that National Board resources add to teacher development across the continuum for school systems.
4. Articulate that value in language more readily understood by system leaders and policymakers.
5. Launch the 2015-16 planning process to ground this perspective in the goals and approaches we will take over the next year.
<table>
<thead>
<tr>
<th>Timing</th>
<th>Task</th>
<th>Learning Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00am</td>
<td>Breakfast</td>
<td>• Eat a good breakfast to start the day on the right foot</td>
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<tr>
<td>9:00-9:15am</td>
<td>Framing Urgency and Hope: High-level Introduction</td>
<td>• Provide everyone with the opportunity to see the big picture of what we hope</td>
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<td></td>
<td>• Review of Agenda and 2-Day Roadmap</td>
<td>to accomplish and how we’ll get there</td>
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<tr>
<td></td>
<td>• Introduce day’s objectives and resources</td>
<td>• Get set on some of the tools we’ll be using for the day</td>
</tr>
<tr>
<td>9:15-9:35am</td>
<td>Framing Urgency and Hope: Defining the Challenge</td>
<td>• Be explicit and intentional about how we frame the situation</td>
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<tr>
<td></td>
<td></td>
<td>• Introduce systems level thinking</td>
</tr>
<tr>
<td>9:35-9:50am</td>
<td>Framing Urgency and Hope: Connect to Core</td>
<td>• Anchor the work of these two days as a continuation of all the work we’ve done</td>
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<tr>
<td></td>
<td></td>
<td>previously and reiterating this is the work NBPTS was founded to do</td>
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<tr>
<td></td>
<td></td>
<td>• Share the work</td>
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<tr>
<td>9:50-10:15am</td>
<td>Framing Urgency and Hope: Hopes and Fears</td>
<td>• Creating psychological safety</td>
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<td></td>
<td>• Hopes and Fears Protocol</td>
<td>• Build collective ownership of everyone’s feelings</td>
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<td></td>
<td></td>
<td>• Validate and acknowledge the experience of optimism and challenge, as well as</td>
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<tr>
<td></td>
<td></td>
<td>the tension between the two</td>
</tr>
<tr>
<td>10:15-10:45am</td>
<td>Framing Urgency and Hope: Ways of Working Together</td>
<td>• Build collective ownership of everyone’s feelings</td>
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<td></td>
<td>• Hopes, Fears and Agreements Protocol</td>
<td>• Establish team norms help build team discipline, trust between team members,</td>
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<tr>
<td></td>
<td>• Introduce and adopt process norms and the Collaboration</td>
<td>and supports a safe environment</td>
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<tr>
<td></td>
<td>• Post agreed upon norms</td>
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<tr>
<td>10:45-11:00am</td>
<td>BREAK</td>
<td>• Give people time to process, decompress, and recharge for next session (and</td>
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<tr>
<td></td>
<td></td>
<td>attend to bio needs)</td>
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</tbody>
</table>
### Learning Agenda: Home Week

**Version: September 15, 2015**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:00-11:30am</td>
<td>Framing Urgency and Hope: The New “Why” Now</td>
<td>Practicing systems level thinking</td>
</tr>
<tr>
<td>11:30-12:15pm</td>
<td>Imagine the Future:</td>
<td>Reinforcing people's capacity to think broadly/systemically</td>
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<tr>
<td></td>
<td>- Creativity Stretches</td>
<td>- Getting people unstuck and creative juices flowing</td>
</tr>
<tr>
<td></td>
<td>- 2030 Protocol</td>
<td>- Establish tolerance for imperfection/bleeding first drafts</td>
</tr>
<tr>
<td></td>
<td>- Workshop Individual Ideas using same Consultancy Protocol</td>
<td>- Intentionally setting aside roadblocks</td>
</tr>
<tr>
<td>12:15-1:15pm</td>
<td>Lunch</td>
<td>Eating does the body good</td>
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<tr>
<td></td>
<td>- Cross-pollination “activity” (&lt;10 minutes)</td>
<td>Catch up with colleagues</td>
</tr>
<tr>
<td>1:15-2:15pm</td>
<td>Assess Current Field</td>
<td>Review the Landscape document that people contributed to</td>
</tr>
<tr>
<td>60 minutes</td>
<td>- What currently exists in the sector?</td>
<td>- Work through a learning protocol</td>
</tr>
<tr>
<td></td>
<td>- Workshop 4-5 ideas as a whole group</td>
<td>- Workshop individuals ideas</td>
</tr>
<tr>
<td></td>
<td>- Workshop individual ideas using same Consultancy Protocol</td>
<td>- Reflect on developing intentional learning systems</td>
</tr>
<tr>
<td>2:15-3:15pm</td>
<td>Value Propositions: Part I</td>
<td>Strengthen knowledge of current National Board initiatives across the continuum</td>
</tr>
<tr>
<td>60 minutes</td>
<td>- Diagnostic Pulse Check</td>
<td>Deepen our familiarity with National Board resources</td>
</tr>
<tr>
<td></td>
<td>- Learn about the major National Board resources</td>
<td></td>
</tr>
<tr>
<td>3:15-3:30pm</td>
<td>BREAK</td>
<td>Give people time to process, decompress, and recharge for next session (and attend to bio needs)</td>
</tr>
<tr>
<td>15 minutes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:30-4:30pm</td>
<td>Value Propositions: Part II</td>
<td></td>
</tr>
<tr>
<td>60 minutes</td>
<td>- Introduce home groups/mixed groups and Jigsaw</td>
<td></td>
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<tr>
<td></td>
<td>- Value Proposition Groups</td>
<td></td>
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<tr>
<td></td>
<td>- Advocacy Pitch</td>
<td></td>
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<tr>
<td></td>
<td>- Post Pulse Check</td>
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</tr>
<tr>
<td>4:30-4:45pm</td>
<td>Closing</td>
<td>Create space for reflection</td>
</tr>
<tr>
<td>15 minutes</td>
<td>- Brief review of what we’ve accomplished</td>
<td>Acknowledge progress</td>
</tr>
<tr>
<td></td>
<td>- Set up tomorrow</td>
<td>Prepare for tomorrow</td>
</tr>
<tr>
<td></td>
<td>- Feedback:3:2:1</td>
<td>Give and receive feedback for real-time learning</td>
</tr>
<tr>
<td></td>
<td>- Check In: Fruit Salad</td>
<td></td>
</tr>
</tbody>
</table>

Kristen Callisto
- Here's one version of this protocol. Joe will modify for our purposes today.
- Learning, as with creativity and innovation, is an iterative process as I read in How to Fly a Horse (Kevin Asanov, 2005). Creating intentional processes to get feedback and make improvements is key.
- The myth of 10,000 steps -- the default setting on most devices -- is apparently just a marketing ploy, but here's some interesting news: on how many steps a day you should be taking.
- Why a value proposition? Remember Simone's video...lead from inside out!
- No actual resources, but there are lots of great tools and methods for effective learning. Check back with Kristen as she conducts more research to see what's the latest she's reading! Got some, share with people on Slack!
- Learning in action requires real-time data and real-time adjustments. There are multiple ways and protocols to collect feedback. Today we are using a 3:2:1 protocol which might be familiar for those who’ve had to make exit slips!
Learning Agenda: Home Week
Version: September 16, 2015

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- Launch intentional learning structures and processes to continue learning both within and between teams.

More specifically we will:

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2. Deepen our familiarity of resources the National Board has that can strengthen teaching.
3. Identify the value that National Board resources add to teacher development across the continuum for school systems.
4. Articulate that value in language more readily understood by system leaders and policymakers.
5. Launch the 2015-16 planning process to ground this perspective in the goals and approaches we will take over the next year.
### Learning Agenda: Home Week

**Version:** September 18, 2015

#### THURSDAY AGENDA

<table>
<thead>
<tr>
<th>Timing</th>
<th>Task</th>
<th>Learning Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00am</td>
<td><strong>Breakfast</strong></td>
<td>• Eat a good breakfast to start the day on the right foot</td>
</tr>
<tr>
<td>9:00-9:20am</td>
<td>Framing the Day</td>
<td>• Catch up with colleagues</td>
</tr>
<tr>
<td></td>
<td>• Review day’s objectives and agenda</td>
<td>• Locate ourselves in the journey again (with improvements)</td>
</tr>
<tr>
<td></td>
<td>• Feedback</td>
<td>• Acknowledge feedback and demonstrate follow-up</td>
</tr>
<tr>
<td></td>
<td>• <strong>Revisit Norms</strong></td>
<td>• Ensure that we are doing all we can to have a productive day</td>
</tr>
<tr>
<td></td>
<td>• <strong>ESSP</strong></td>
<td>• and that we meet people’s needs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Launch intentional learning structures and processes to continue</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• learning both within and between teams</td>
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<tr>
<td></td>
<td></td>
<td>• Introduce systems level thinking as the approach to our work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• and apply that to our 2016 planning process</td>
</tr>
<tr>
<td>9:20-10:20am</td>
<td><strong>Language:</strong> The What, The Words</td>
<td>• Close the loop on an earlier activity and build the bridge to current activity</td>
</tr>
<tr>
<td></td>
<td>• <strong>Review value proposition summary</strong></td>
<td>• carry work forward rather than leave it behind</td>
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<tr>
<td></td>
<td>• Craft our language</td>
<td>• Assess if learning has occurred on the components (thus meeting</td>
</tr>
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<td>• <strong>Post Survey</strong></td>
<td>• one of our objectives)</td>
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<td>• Strengthen knowledge of current National Board initiatives</td>
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<td>• across the continuum to build a common foundation of</td>
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<td></td>
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<td>• understanding</td>
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<td>• Deepen our familiarity of resources the National Board has that</td>
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<td></td>
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<td>• can strengthen teaching</td>
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<td></td>
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<td>• Identify the value that National Board resources add to teacher</td>
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<td>• development across the continuum for school systems.</td>
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<td></td>
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<td>• Articulate that value in language more readily understood by</td>
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<td></td>
<td></td>
<td>• system leaders and policymakers.</td>
</tr>
<tr>
<td>10:30-10:45am</td>
<td><strong>BREAK</strong></td>
<td>• Give people time to process, decompress, and recharge for next</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• session (and attend to bio needs)</td>
</tr>
<tr>
<td>10:35-12:00pm</td>
<td><strong>Goal Setting:</strong> Short, Mid, Long Term</td>
<td>• Having clear goals allows a team to strategize more effectively</td>
</tr>
<tr>
<td></td>
<td>• <strong>Introduction of planning document template</strong></td>
<td>• Give people the work time to create a connection from macro</td>
</tr>
<tr>
<td></td>
<td>• Individuals and/or teams work together to translate organization level</td>
<td>• picture to micro work</td>
</tr>
<tr>
<td></td>
<td>goals into their relevant individual context (Go <strong>HERE</strong>))</td>
<td>• Doing this work “together” allows us to see the ways the work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Launch the 2015-16 planning process to ground this perspective in the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>goals and approaches we will take over the next year.</td>
</tr>
</tbody>
</table>
# Learning Agenda: Home Week

**Version: September 16, 2015**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00-1:00pm</td>
<td>Lunch</td>
<td>-  Eating does the body good... except when it doesn’t – this learning bubble is for you Emma!</td>
</tr>
<tr>
<td></td>
<td></td>
<td>-  Catch up with colleagues or decompress and find some silent time</td>
</tr>
<tr>
<td>1:00-2:00pm</td>
<td><strong>How: From Vision to Action</strong>&lt;br&gt;  -  Individuals and/or teams work together to begin planning strategy, goals</td>
<td>-  Getting concrete and to the “how”&lt;br&gt;  -  Providing you the time to work with lots of supportive colleagues in the same space&lt;br&gt;  -  Ground ourselves in our vision for the profession and how we can bring it to reality over the long term&lt;br&gt;  -  Launch the 2015-16 planning process to ground this perspective in the goals and approaches we will take over the next year.</td>
</tr>
<tr>
<td>2:00-2:15pm</td>
<td><strong>BREAK</strong></td>
<td>-  Give people time to process, decompress, and recharge for next session (and attend to bio needs)</td>
</tr>
<tr>
<td>2:15-3:45pm</td>
<td><strong>Getting Feedback on Your Plan</strong>&lt;br&gt;  -  Consultancy Protocol (2 Cycles)&lt;br&gt;  -  Make adjustments to your plan</td>
<td>-  Get feedback on your plan from multiple perspectives&lt;br&gt;  -  Revisit and practice the Consultancy protocol in full&lt;br&gt;  -  Engage in cross-functional collaboration to benefit from multiple perspectives and shared learning&lt;br&gt;  -  Launch intentional learning structures and processes to continue learning both within and between teams.</td>
</tr>
<tr>
<td>3:45-4:15pm</td>
<td><strong>Next Steps</strong>&lt;br&gt;  -  Intentional Learning Structures</td>
<td>-  What happens next – information will be shared but space is allowed for feedback and adjustments&lt;br&gt;  -  Launch intentional learning structures and processes to continue learning both within and between teams.</td>
</tr>
<tr>
<td>4:15-4:45pm</td>
<td><strong>Closing</strong>&lt;br&gt;  -  Review two days&lt;br&gt;  -  Check in&lt;br&gt;  -  Celebrate work&lt;br&gt;  -  Feedback</td>
<td>-  Feedback mechanism&lt;br&gt;  -  Engage in cross-functional collaboration to benefit from multiple perspectives and shared learning&lt;br&gt;  -  Launch intentional learning structures and processes to continue learning both within and between teams.</td>
</tr>
</tbody>
</table>
Learning Agenda: Home Week
Version: September 16, 2015

7 Norms of Collaboration

1. Pausing
2. Paraphrasing
3. Posing Questions
4. Putting Ideas on the Table
5. Providing Data
6. Paying Attention to Self and Others
7. Presuming Positive Intentions

Agreed Upon Norms

- **Community**: Be vulnerable and authentic. Take risks.
- **Growth**: Own your own learning. Challenge each other. Provide processing time for this complex work.
- **Equity**: Mind your own airtime. Speak up or scale back as needed.
- **Respect**: Assume the best of intentions. Seek to understand.
- **Results**: Stay grounded in the Five Core Propositions. Maintain focus with high engagement and low technology. Maintain a parking lot, and always identify next steps.
- **Bring levity!**
  - Use technology however you need to best enhance your learning and work, but monitor your engagement
- **Safe Space**: Have awareness and sensitivity to other’s vulnerability: forgive yourself and others
- **Agency**: Own your role in our work together
- **Multiperspectivity**: Value and seek multiple perspectives; shared responsibility for bringing others’ roles in
- **Curious**: Be it...like George: be a selfish learner
- **Lean In**: Don’t self-censor, put ideas out there
Learning Agenda: Home Week
Version: September 10, 2015

ESVP

Running the activity
1. Ask each participant to report anonymously his or her attitude toward the activity as an Explorer, Shopper, Vacationer or Prisoner.
   - Explorers – Are eager to discover new ideas and insights. They want to learn everything they can about the iteration/release/project.
   - Shoppers – Will look over all the available information, and will be happy to go home with one useful new idea.
   - Vacationers – Aren’t interested in the work of the retrospective, but are happy to be away from the daily grind.
   - Prisoners – Feel that they’ve been forced to attend and would rather be doing something else.

2. Collect the results and create a histogram to show the data.

3. Acknowledge the results and guide a discussion about what the results mean for the group.

Source: http://www.funretrospectives.com/esvp-explorer-shopper-vacationer-prisoner/
Learning Agenda: Home Week  
Version: September 16, 2015  
Planning Documents  

**States and District Plans, you want to go HERE**  

**Partnerships and Initiative Plans, you want to go HERE**
Learning Agenda: Home Week
Version: September 16, 2016

Consultancy Protocol

Estimated Time: 30 minutes

1. **Overview (1-2 min):** Presenter gives short overview of great work they want to share

2. **Clarifying Questions (2 min):** Participants ask clarifying questions of the presenter. Clarifying questions have brief, factual answers and are intended to help the group develop a deeper understanding of the work.

   Examples of clarifying questions are:
   - Where did this place?
   - Who are the stakeholders involved?
   - How did you uncover this example?
   - What was your role in this work?
   - What was some of the language, value propositions, theories of change you used that was successful?

3. **Probing Questions (3 min):** Participants ask probing questions of the presenter. Probing questions help the presenter expand his/her thinking. There is no discussion by the group of the presenter’s responses.

   Examples of probing questions are:
   - What made you think this is great (innovative, creative, transformative) work?
   - What is scaleable or transferrable to another context? What is not?
   - What challenges have you encountered and how have you overcome them?
   - What challenges do you foresee?

4. **Discussion (10 min):** The presenter physically steps back from the discussion. The group discusses the work while the presenter is silent and takes notes. Participants should resist the urge to speak directly to the presenter and instead address each other. They should begin with Positive Feedback (warm feedback) - celebrate key points, restate language that seems compelling, etc. Next the group will move to Growth Feedback (cool feedback): the group takes a more critical look at the work, perhaps areas to push the thinking even more, or assist in solving some of the ongoing or forthcoming challenges.

5. **Reflection (3 min):** The presenter reflects on what he/she has heard and what he/she is now thinking, sharing any points that particularly resonated and any potential next steps. It is not necessary to respond point by point to what was said during discussion.
Learning Agenda: Home Week
Version: September 18, 2015

6. **Debrief (5 min)**: The facilitator leads a conversation about the group’s experience with the consultancy protocol. Participants should resist the urge to shift the debrief discussion back to the dilemma.

7. **Closing the Loop (4 min)**: Participants have the opportunity to each share one “take away” form the discussion or something they will bring to their own work.

Commented [KCS]: For today’s usage, I would recommend you skip this step unless someone is making an adjustment between the first and second cycle. I would recommend you do it for the second cycle.

---

**Check In**

**Snowball Fight**

**Materials Needed**: Blank paper

**Steps**:
1. Write thing you enjoyed or plan to take forward (i.e. use again)
2. Write an adjective that describes how you feel about those past two days
3. Crumple your paper up
4. Stand up and form a circle
5. Throw it at your friends! (est. 10 seconds)
6. Pick up a paper and read aloud what is written on the paper
7. Give paper back to Kristen
October 14, 2015 Strategy Session Agenda

Outcomes:
1. Review September Strategy Session feedback
2. Draft external messaging language for core NBPTS resources
3. Engage in collaboration internally and cross-functionality on shared communications and advocacy work
4. Utilize systems-level thinking in strategy development

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 minutes</td>
<td>Opening</td>
</tr>
<tr>
<td></td>
<td>• Review Outcomes and Planning Arc</td>
</tr>
<tr>
<td></td>
<td>• Norms</td>
</tr>
<tr>
<td>10 minutes</td>
<td>Review September Strategy Session Feedback</td>
</tr>
<tr>
<td></td>
<td>• Summary</td>
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<tr>
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<td>• Takeaway</td>
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<td>• Actions</td>
</tr>
<tr>
<td>15 minutes</td>
<td>Review of Value Proposition</td>
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<td></td>
<td>• What is a value proposition?</td>
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<td>50 minutes</td>
<td>External Messaging Work</td>
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<td>• Review Spreadsheet</td>
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<td></td>
<td>• National Board Certification</td>
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<td></td>
<td>• NBCTs</td>
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<tr>
<td>5 minutes</td>
<td>Closing</td>
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</tbody>
</table>
Learning Agenda: November

Long Range Objectives:
- Introduce systems level thinking as the approach to our work [S]
- Engage in cross functional collaboration to benefit from multiple perspectives and shared learning [C]
- Launch intentional learning structures and processes to continue learning both within and between teams. [L]

Meeting Specific Objectives:
- Identify perspectives around “the work” of National Board for Professional Teaching Standards
- Discuss these perspectives and the implications for 2016 planning and execution of plans

<table>
<thead>
<tr>
<th>Timing</th>
<th>Task</th>
<th>Learning Design</th>
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</thead>
<tbody>
<tr>
<td>12:00-12:00pm 10 minutes</td>
<td>Overview of Session</td>
<td>• Demonstrate that sessions are part of a larger strategic design [L]</td>
</tr>
<tr>
<td></td>
<td>• Where we’ve been</td>
<td>• Articulate change in strategy [C]</td>
</tr>
<tr>
<td></td>
<td>• Today’s session design</td>
<td>• Be vulnerable and transparent about own learning</td>
</tr>
<tr>
<td></td>
<td>• Where we could go</td>
<td>[C &amp; L]</td>
</tr>
<tr>
<td>12:05-12:40pm 35 minutes</td>
<td>Perspectives on the Work</td>
<td>• Capture learning and expertise from new staff member [S]</td>
</tr>
<tr>
<td></td>
<td>• Activity: Perspective Mapping</td>
<td>• Surface similarity and differences in a psychologically safe manner [C]</td>
</tr>
<tr>
<td></td>
<td>• Discussion</td>
<td>• Develop some shared language to discuss</td>
</tr>
<tr>
<td></td>
<td>• Jobs to Be Done Theory</td>
<td>challenges of the work [C &amp; L]</td>
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<tr>
<td></td>
<td>Key Questions:</td>
<td>• Create the space to talk to each other about</td>
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<tr>
<td></td>
<td>• What are the various perspectives around the work and</td>
<td>broader issues [C &amp; S]</td>
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<tr>
<td></td>
<td>strategies at the National Board?</td>
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<tr>
<td></td>
<td>• What are the broader implications of the</td>
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<td></td>
<td>convergence/divergence of these perspectives?</td>
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</tr>
<tr>
<td>12:40-1:00pm 15 minutes</td>
<td>Learning Organization Survey</td>
<td>• Provide the time and space for individuals to do</td>
</tr>
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<td></td>
<td>• Framing</td>
<td>learning organization survey in busy day [L]</td>
</tr>
<tr>
<td></td>
<td>• Time Blocking: Link to Survey is HERE</td>
<td></td>
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</tbody>
</table>
Learning Agenda: November

Use of Learning Agenda

In the spirit of learning, we’ve created a “learning agenda.” If you go to the Review tab and select “Simple Markup” then you’ll see many comment bubbles on the right hand side of this document.

These comment bubbles provide additional resources, context and allow you to interact with the content of this agenda as you want.

Don’t want all the distracting bubbles? Go back to that Review tab and select “No Markup” or “Original”
Learning Agenda: November

Perspective Mapping

Materials Needed: Index Cards/Post-It Notes, White Board

Step 1: Facilitator introduces activity and prompt
Step 2: Participants will write their responses on index cards or post-it notes
Step 3: Participants post responses on white board
Step 4: Facilitator organizes responses, talking out loud while individually processing
Step 5: Group discussion
  - Are there any perspectives missing? Why are they missing?
  - In your mental map, would you have grouped the responses differently?
  - Does anything surprise you? Why?
  - Did anything not surprise you? Why?
  - What reactions do you have to what you’ve seen and heard?
  - What implications do you see for working with your colleagues?

Commented [KCB]: I wonder if a helpful framework could be used. Dr. Bono’s 8 Thinking Hats if you need alternative perspectives to support to respond to this question. For a list of all the related articles, or more information, you can go to [here].
Tuesday’s Agenda  
December 15, 2015

Outcomes:
1. Take advantage of Home Week to collaborate, specifically in configurations that are more challenging to do when working remotely
2. Generate and discuss the width of strategies currently being planned for 2016
3. Learn from each other to strengthen our individual and collective strategy development.

<table>
<thead>
<tr>
<th>Timing</th>
<th>Task</th>
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</thead>
<tbody>
<tr>
<td>1:00-1:10pm</td>
<td>Overview of Session</td>
</tr>
<tr>
<td>10 minutes</td>
<td>• Review the session plan and design</td>
</tr>
<tr>
<td>1:10-1:15pm</td>
<td>Individual Reflection</td>
</tr>
<tr>
<td>5 minutes</td>
<td>• Reflect on your goals and the strategies you plan to implement to achieve them</td>
</tr>
<tr>
<td>1:15-1:25pm</td>
<td>Small Group Work</td>
</tr>
<tr>
<td>10 minutes</td>
<td>• Assigned pairs take time to learn each other’s context – specifically our goals and strategies</td>
</tr>
<tr>
<td>1:25-1:45pm</td>
<td>Small Group Work</td>
</tr>
<tr>
<td>20 minutes</td>
<td>• Discuss your strategies</td>
</tr>
<tr>
<td></td>
<td>▪ What strategy are you most excited about?</td>
</tr>
<tr>
<td></td>
<td>▪ What strategy are you most concerned about?</td>
</tr>
<tr>
<td>1:35-2:40pm</td>
<td>Whole Group Work</td>
</tr>
<tr>
<td>65 minutes</td>
<td>• Generate bands of strategy</td>
</tr>
<tr>
<td></td>
<td>• Discussion</td>
</tr>
<tr>
<td>2:50-3:00pm</td>
<td>Closing</td>
</tr>
<tr>
<td>10 minutes</td>
<td>• Preview of Wednesday</td>
</tr>
<tr>
<td></td>
<td>• Feedback</td>
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</tbody>
</table>
## Wednesday’s Agenda

**December 16, 2015**

### Outcomes:

1. Take advantage of Home Week to collaborate, specifically in configurations that are more challenging to do when working remotely
2. Elaborate on the width and depth of strategies currently being planned for 2016
3. Introduce the 2016 Progress Tracker to support our individual and collective strategy development

<table>
<thead>
<tr>
<th>Timing</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00-3:05pm 5 minutes</td>
<td>Opening</td>
</tr>
<tr>
<td></td>
<td>• Review agenda</td>
</tr>
<tr>
<td></td>
<td>• Additions to agenda</td>
</tr>
<tr>
<td>3:05-3:20pm 15 minutes</td>
<td>Content Experts</td>
</tr>
<tr>
<td></td>
<td>• Learn from some of our colleagues about the work they are doing</td>
</tr>
<tr>
<td>3:20-3:50pm 30 minutes</td>
<td>Strategy Continuation</td>
</tr>
<tr>
<td></td>
<td>• Strategy discussion continued</td>
</tr>
<tr>
<td>3:50-4:00pm 10 minutes</td>
<td>Goal Inputting</td>
</tr>
<tr>
<td></td>
<td>• Time given to put your goals into tracking document</td>
</tr>
<tr>
<td>4:00-4:25pm 25 minutes</td>
<td>Overview of 2016 Progress Tracker</td>
</tr>
<tr>
<td></td>
<td>• Review of the tracking document for 2016</td>
</tr>
<tr>
<td>4:25-4:30pm 5 minutes</td>
<td>Closing</td>
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<td></td>
<td>• Feedback</td>
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</tbody>
</table>
Appendix D: Thinking About Strategy

N.B. All the text below the slides are actual notes I have written in the document.
In early years people thought the adoption process of a new innovation was relatively smooth. Recent research suggests that in fact there are marked transition points in the adoption of a new innovation across each of the five adoption profiles (i.e. innovators, early adopters, early majority, etc). In particular, there is a significant transition required between early adopters and early majority, this is known as “crossing the chasm.” Whereas the old theory held that the early majority were willing to adopt innovations because the early adopters provided social proof, the new theory holds that early adopters are attracted to a new innovation in marked and different ways than the majority. Thus, for an organization trying to scale — whether it be a technology, product or impact — the implication is that whatever you have done to attract your early adopters, you cannot continue to apply if you want market saturation. Social proof needs to be created separately than reliance on early adoption. NBPTS had a pretty successful early adopters strategy and now is trying to cross the chasm. Being aware of this chasm theory can help us understand why new and different strategies are now required.
Most successful organizations have an ability to be ambidextrous. It is this ambidexterity that contributes to their longevity. Essentially there are two types of activities an organization can engage in: Exploit vs. Explore. Activities in the exploit space require that an organization continually improve on it’s core products/processes. Simultaneously, an ambidextrous organization takes on exploratory activities. In this way, the organization improves on itself while simultaneously seeking to either disrupt itself with a new idea or have the greenspace to be responsive to emergent opportunities.

O’Reilly and Tushman’s theory of ambidextrous organizations also states that leadership must be very clear to keep the exploit activities separate from the explore activities. Leaders also should communicate this separation explicitly to their teams. It is leadership that holds the ambidexterity and allows workers to become great within their lanes.

This framework also recognizes and leverages the inherent diversity in a workforce where some people are inclined to be more abstract/big picture and others more concrete/details-oriented (see also hedgehogs v. foxes).
In conjunction with the idea of exploit/explore is Kanter’s Innovation Pyramid. To be successful National Board should strategically diversify. Another way to view diversification of strategy is hedging its bets.

This model can be seen in two ways. Either that Level 1 & 2 represent the exploit space and Level 3 is the explore space OR that the pyramid can be applied to both exploit and explore space.

Essentially the bottom line is that National Board should consider diversified strategies to increase the likelihood of scaling up Board-certification. Again, this diverse approach also mirrors well people’s natural inclination to towards the extremes of “slow and steady” versus “go big or go home.” The pyramid reminds us to maintain a balance rather than put all our eggs in one basket or suffer from “we need a bigger hammer syndrome” (i.e. double down on what we’re already doing).

Anticipated resistance is likely to be from people who resist big, aspirational moves because they don’t see it as being possible (e.g. “we don’t have the budget for that”). However, if the organization is ever to have big impact on transforming teaching and learning, it must make some big moves. It’s a Les Brown approach: shoot for the moon and if you fall at least you’ll land amongst the stars.

Additional anticipated resistance is likely to be from people who see many incremental wins and continuous improvements as not leading to dramatic change needed to get dramatic results. However, the tortoise did win that race and people do throw sand dollars back in to the surf. However, it’s a smart way to do business because you strengthen your fundamentals which gives you space and resources to go after bigger targets.

Nuance and diversification is the approach.
At the National Board, we can combine the two concepts to create a three-tiered approach.

There’s exploitation that essentially maintains conditions and makes small, incremental wins. I do think this is an important space because there are conditions that we’ve established that should be maintained or established as one component to creating the favorable conditions to scale. I call these “Exploit I” activities.

Then there’s exploitation that requires bigger stretches to get the wins. Exploit II pushes us further into newer territory as we seek to integrate the National Board processes and resources INTO school systems rather than ancillary. Furthermore it seeks to continually reduce barriers to Board certification and increase access in dramatically new ways (e.g. Redesign 3.0). I call these “Exploit II” activities.

* Sort of fitting how 1/I looks like “I” as in the individual approach and II/2 could also be “to” as we’re moving “to” a new place, “to” schools” or for “twos”
This is a very very poor and rough example of how that could look (definitely need help with this one, but put in table more for illustrative purposes)

[Manager of Policy] and I talked about ways we could take these concepts further and map against the continuum in reference to policy.

We might consider professional teacher and board certified teacher our exploit work whereas preservice/novice and teacher leadership are exploratory for us.

Another perspective we discussed was how teacher leadership in terms of policy is extremely exploratory but there’s possibility that the preservice space might be exploit 2 (stretch explore)
This diagram probably only makes the most sense to me and I still need to figure out how to explain it but it’s how I see we could collapse all three into one overall strategy for our strategy 😊