Cross-Sector Collaboration to Design Breakthrough School Models: Strategic Community Building for Transcend

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CROSS-SECTOR COLLABORATION
TO DESIGN BREAKTHROUGH SCHOOL MODELS:
STRATEGIC COMMUNITY BUILDING FOR TRANSCEND

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

Submitted by

Rev. Tyler S. Thigpen

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

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ACKNOWLEDGEMENTS

For Joy, River, Oswin, Linus, and Irving.
Words cannot express the depth of my love for you.
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ABSTRACT

Traditional “industrial model” schooling was created for a different era. Student outcomes have flat-lined, and student motivation is disturbingly low. To see both the change and leap in outcomes students deserve, we must engineer a new design of school for the 21st century. One of the most significant barriers to developing and spreading relevant school models is the lack of research and development in education (R&D). Transcend is a nonprofit organization created in 2015 to build an R&D engine and accelerate innovation in the core design of “school.” As a doctoral resident with Transcend, my project question was: how might Transcend build the relationships necessary to deliver on its promise of new breakthrough school design? Through illuminating connections between Transcend’s organizational resources, activities, and desired long-term outcomes; identifying cross-sector sources of value that are relevant to Transcend’s mission; framing and communicating Transcend’s value to multiple stakeholder groups strategically and across the education sector; and exchanging value with stakeholders in alignment with Transcend’s current or emerging capabilities, this work led to: (1) moderately strong coherence among internal staff to undertake relevant community-building activities with partners; (2) favorable, but as of yet inconclusive, evidence that current partners find it advantageous to work with Transcend as they collectively pursue breakthrough school design; and (3) strong evidence that Transcend’s network is attracting new partners to advance its mission for breakthrough school design.

Keywords: breakthrough school design, 21st-century schools, design thinking, R&D
INTRODUCTION

The absence of innovation in the design of U.S. schools should concern us. Employers are asking for it (McKinsey, 2012). Parents are demanding it (Strauss, 2014). The international community recognizes the need for it (UNESCO, 1996). Students are, on the whole, bored with school as is (Yazzie-Mintz, 2010). And even when we have wanted to, historically, we are slow at changing our schools to make them relevant (Graham, 2005). The traditional U.S. “industrial model” of schooling was created for a time long behind us; student outcomes have flat-lined at best, while America continues to lag top countries in math, science, and reading (OECD, 2016).

But our children cannot afford to wait for the adults in the room to catch up.

To see both the change and leap in outcomes students deserve, we must engineer a new design of school for the 21st century. Today’s children need not just academic skills and knowledge, but learning mindsets, creativity, collaboration abilities, and personal leadership. Whether we call the approach “21st-century learning,” “deeper learning,” “21st-century skills,” “the 4 Cs,” “post-Gutenberg learning,” “next generation schools,” “breakthrough schools,” or something else, the emerging trend to move beyond teaching facts and more fully integrate complex thinking, social and emotional learning, and contemporary marketplace skills into our nation’s classrooms is not a silver bullet to fix schools, but a sea change in how and for what reasons we educate in an information age. Definitions and reasons have been at the heart of recent rhetoric and debate around renovating the instructional core (Martinez & McGrath, 2014; Mehta, 2013; Wagner, 2008). But how we achieve this integration at scale is less obvious.
Transcend is a new national nonprofit organization that envisions a cross-sector educational partnership advancing the design, launch, and spread of new breakthrough school models. Founded in August 2015, Transcend contends that pervasive academic mediocrity, sustained inequity, and emerging marketplace demands call for fundamentally new learning environments—models built from the ground up, as opposed to renovations to the industrial model. To make these new learning environments accessible to children as quickly as possible, Transcend is focusing on what Everett Rogers (2003) argues are the first people to spread innovation through a community: “innovators” (2.5% of the total market) who create the solutions; and “early adopters” who take these solutions up (13.5% of the total market).

**Figure 1.** — Innovation adoption curve

Transcend undertakes three core activities among these “innovators” and “early adopters”: (1) building, then replicating, new school model designs in partnership with visionary school operators in district, charter, and independent schools; (2) building a diverse, transdisciplinary force of talent for the sector—called the Yellow Hats League to
build on the metaphor of “builders”—who will perform the deep research and development (R&D) needed for school innovation; and (3) building, then sharing, actionable knowledge for the sector related to school model innovation and change management. For reasons I will explore later, Transcend calls this three-pronged focus of school-founding, talent-deploying, and knowledge-building an “R&D engine” for the education field. When I took up a residency with Transcend in July 2016, the organization had two active partnerships with school operators on track to build breakthrough models.

To connect its current work to its long-term goal of building and codifying breakthrough models that scale to many schools throughout the United States, Transcend articulates a number of hypotheses chronicling how breakthrough school models will spread beyond the education innovators and early adopters to the rest of the field:

- Early adopters, with modest design, implementation, and financial support, will take up these models if the models create dramatically better outcomes on a broad definition of student success and are designed to be easy for others to implement;
- If those models resonate with what parents want for their children, prove results, and students and families have meaningful exposure to them, they will demand the experiences provided by these new models of schooling (including the requisite policy conditions), resulting in stronger outcomes for all students on an expanded definition of success;
- If the policy context is conducive to the features of the new models (e.g., competency-based approaches to credit, accountability systems based on individual growth in academic knowledge, and skills rather than absolute
proficiency, as well as an emphasis on additional dimensions of student success such as collaboration, communication, agency, self-management, etc.), then more districts/schools will have the ability to adopt new models in response to increasing demand from families and communities, and more innovation will emerge; and

- If all of the above happen in continuous, mutually reinforcing cycles, then over the next 3-5 years, [Transcend] will unleash unprecedented progress in driving and spreading breakthrough school models (Childress, Samouha, Tavenner, & Wetzler., 2015).

Placing aside the validity of the above strategic bets for the moment, at minimum they reveal that Transcend cannot succeed in isolation. Myriad stakeholders across various education sub-industries—e.g., research, policy (the Every Student Succeeds Act in particular), philanthropy, business, district offices, school level leadership, state level leadership, funders, and local communities (students, parents, and leaders)—are implicated in what needs to happen if widespread breakthrough school transformation is to occur. That nearly all of the stakeholder groups implicated are neither directly nor indirectly accountable in Transcend’s model suggests the need for extensive collaboration.

The central question of my strategic project with Transcend, and the focus of the present study, is: how might Transcend build the relationships necessary to deliver on its

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1 By “mutually reinforcing cycles,” I mean to say that Transcend creates, where possible, what Eric Ries (2009) calls a minimum viable product (MVP), which is a “version of a new product which allows a team to collect the maximum amount of validated learning about customers with the least effort.” In Transcend’s case, MVPs take the form of schools or school model components.
promise of new breakthrough school design? My work included four interdependent activities:

1. Understanding, and in some cases identifying, near-term preconditions and intermediary outcomes critical to Transcend achieving its long-term goals for new school innovation;

2. Identifying relevant, high-potential external sources of value (e.g., potential partners, knowledge, etc.) across all three education sectors (charter, private, and traditional district schools);

3. Framing and communicating Transcend’s value with these external sources; and finally,

4. Exchanging value in ways that delivered mutually beneficial results that are moving in the direction of Transcend’s long-term goals.

Before I explain the specific methods and final outcomes of my actions at Transcend, I will explore the concepts that most influenced my work which provide context for the approach I eventually embraced.
APPROACHES TO COMMUNITY-BUILDING STRATEGIES

One tool, two analyses, and two theories influenced my strategy for building community at Transcend, which I will discuss in the following sections:

1. W.K. Kellogg Foundation’s logic model tool;
2. A (brief) analysis of the state of innovative school design in the U.S.;
3. A (brief) analysis of the state of research and development in the education field;
4. Clayton Christensen’s theory of integrating around a “job-to-be-done”; and
5. Clayton Christensen’s and Stephen Kaufman’s theory of the Resources-Processes-Priorities (RPP) for organizational capabilities.

THE LOGIC MODEL TOOL

If building the right relationships to deliver on Transcend’s cross-sector promise of designing and disseminating breakthrough school designs is the overarching goal, then knowing the highest potential reasons why Transcend should reach out to others for help is a critical first step. To that end, I identified W.K. Kellogg Foundation’s logic model as a useful tool for identifying preconditions and intermediary outcomes, unearthing strategic organizational bets, and building consensus among team members about reaching out to others.

Conceptually, a logic model is defined as a tool to evaluate the effectiveness of an organization. It reveals the connections between outcomes (both short- and long-term), program activities and processes, and the theoretical assumptions and principles of the program (WKKF, 2004). It provides more or less a road map describing the sequence of related events and connecting the need for the planned program with the program’s
desired results (WKKF, 2004). Importantly, a logic model includes all of an organization’s stakeholders—internal and external, paid and unpaid, full and part time—and illuminates how their contribution and collaboration are essential to realizing near- and long-term outcomes.

Early in my conversations with one Transcend co-founder, we determined that I would create a logic model for Transcend to include the following components:

- **Inputs**—strategic investments Transcend makes;
- **Activities**—activities Transcend staff undertakes to parlay Transcend’s investments for maximum benefit;
- **Outputs**—particular data points Transcend can measure along the way to see how they are approaching their desired outcomes and whether they should adjust their activities; and
- **Outcomes**—measurable goals Transcend desires for its district partners and ultimately its students.

Together these components would illuminate, at a moment in Transcend’s history, the connections and/or gaps between Transcend’s goals, its investment of resources, and the activities it undertakes when, with whom, and for what reasons. Seeing gaps, in particular, would reveal opportunities to make adjustments and ensure goals are met.

Team members feeling confident about why Transcend does outreach is another desirable benefit. It is observed that the exercise of creating a logic model with all, or nearly all, stakeholders implicated or impacted by the actions and outcomes described within it is often of greater value than the artifact yielded by the end of the process (Wall, 2015). One reason is that the process can yield deeper understanding among stakeholders
of the organization’s mission (Knowlton & Phillips, 2012). A second consequence of inviting Transcend team members into the logic-model creation process, and one more directly related to the present study’s question about building stakeholder relationships, is that it can provide people with “self-authoring” learning experiences (Grotzer, 2015). That is, rather than being shaped by certain expectations from me or Transcend’s co-founders, team members can use their own judgment to take stands, set goals and limits, and address the community-building issues at hand. Given such opportunities, the adult learners on Transcend’s team can develop in their understanding of identified organizational needs. Therefore, tracking not only team members’ understanding of the logic model, but also their attitudes and perceptions about reaching out to other organizations, can provide data around the successful implementation of this tool, which I have included in the forthcoming Results section.

THE STATUS OF INNOVATIVE SCHOOL DESIGN IN THE U.S.

The ground for education innovation is fertile. The emergence over the last decade of Common Core State Standards—which were “designed to be robust and relevant to the real world” (Common Core State Standards Initiative, 2013)—represents a shift away from students being asked to recall discreet bits of knowledge and instead to students being led to cultivate a broader set of outcomes. Further, the recent passing of the Every Student Succeeds Act (ESSA) in December 2015, which lessens the role of the federal government in education and provides states with greater flexibility to chart their own paths forward, complements the shift in standards and, in a way, affords the field of U.S. education freedom to innovate anew.
Still, in a policy environment that is friendly to education innovation, knowing why an organization such as Transcend should reach out to collaborate is not enough; knowing to whom Transcend should reach out is also essential. Who are the key players, the “innovators” that have stepped into a welcoming policy landscape to reimagine the core design of school, and in what direction are they headed? As Transcend forms partnerships with school operators, researchers, policy makers, etc., a risk is having a faulty or incomplete selection criteria, and thus engaging with stakeholders who do not end up generating breakthrough models that can be codified and adopted more broadly.

To mitigate this risk, understanding (1) definitions, or how innovators are defining breakthrough school models, (2) outcomes, or what successful breakthrough school models look like, (3) barriers, or what challenges innovators report facing, (4) exemplar schools, or what, if any, coalitions are forming to advance breakthrough school models, and (5) enabling conditions, or criteria for innovation that takes root—will provide context useful for determining with whom Transcend should collaborate and for what reasons.

**Definitions**

To date, many groups—districts, schools, nonprofits, foundations, businesses, etc.—have articulated the need for broader education outcomes and thus new ways to “do school” (Wagner, 2008; Candler, 2015). While consensus in the field on ways to achieve broader outcomes remains elusive, commonalities among the various articulations of a renovated version of teaching and learning are emerging. The Hewlett Foundation’s (2016) conceptualization of “deeper learning,” for example, represents one such synthesis
that is widely accepted and that is framed from the perspective of the student. According to Hewlett, students in breakthrough schools should be gaining “an indispensable set of knowledge, skills, and beliefs,” including:

- Mastery of core academic content;
- Critical thinking and problem solving;
- Collaboration;
- Effective communication;
- Self-directed learning; and
- An “academic mindset.”

Hewlett’s definition is compelling, in part, because of its connection to student outcomes. In August 2016, the American Institutes for Research reported that students in 20 public and charter schools across the nation that include the “deeper learning” emphases above have higher test scores, better graduation and college enrollment rates, better interpersonal skills, and greater motivation to learn.

Though not yet bolstered by similar quantitative analysis, Transcend also has a point of view on the subject that is framed from the perspective not of the student but that of the school. Months after its founding, Transcend’s co-founders and two of its board members summarized the overarching characteristics of breakthrough school designs. Calling them the “Eight Great Leaps,” the authors highlight the need for schools to move from an “old school” model to “what the future demands” by making the following eight “leaps”:

1. *Focus of school:* moving from academics in core disciplines to deep, interdisciplinary learning;
2. *Expectations for students:* moving from “set early and keep modest” to high for every student;
3. *Students’ role:* moving from obedient, passive recipients to active drivers of learning;
4. *Learning modes:* moving from fixed, classroom-based to flexible, personalized, anywhere;
5. *Educator’s role:* moving from alone—one person, many hats—to together—many people, many hats;
6. *Parents’ role:* moving from passive customers to active partners;
7. *School community:* moving from separation to diverse interconnectedness;² and
8. *Technology use:* moving from peripheral to embedded (Childress et al., 2015).

While different groups and individuals use nuanced language and definitions to describe relevant student outcomes or breakthrough school models, they all suppose that education today requires teachers using a suite of teaching and learning methods different than those used in the teaching and learning of facts, concepts, and even the skills currently taught via Common Core and other state standards.

**Outcomes**

In terms of the effectiveness of breakthrough approaches, the horizon is promising. Some breakthrough approaches—which reflect changes advanced in Transcend’s Eight Great Leaps—have demonstrated proven ability to increase student achievement (Zeiser, 2014), to improve disturbingly low levels of student engagement (Yazzie-Mintz, 2010), to address the burgeoning gap between the number of job applicants with the necessary entry-level skills and the number of college graduates who cannot find work (McKinsey, 2012; “Reimagining the Classroom,” 2014), and even to yield student growth on traditional measures. For example, in 2014, a high-poverty public

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² This “leap” signifies a move *away from* separate classrooms, desks, lockers, with often homogenous racial/economic populations and few relationships across lines of difference. It represents a move *toward a focus on:* love, collaboration, and shared ownership for community, with restoration if breached; diversity, equity, and inclusion at the heart of community practices; and boundaries of learning community permeable to enable a broad set of relationships.
school (Nolan) in Detroit launched a personalized learning platform, which represents one innovation related to Transcend’s third (student role), fourth (learning modes), fifth (educator role), and eighth (technology use) Great Leaps. In year one, 71 percent of Nolan students achieved one or more years of growth in reading and 61 percent in math. The school ranked third out of 124 Detroit schools in reading growth ("Reimagining the Classroom," 2014). In another related study of 62 district and charter schools, researchers found that students in personalized learning environments were significantly more likely to have higher math and reading achievement scores “overall and in a majority of schools” than students not participating in personalized learning environments (Steiner, 2015). That said, it is important to keep in mind that measuring new things against old metrics is less than ideal, and that new metrics are necessary.

Personalized learning is not the only innovative example associated with compelling student outcomes; the topics are awaiting more academic study, but initial results are promising. In 2013, Mount Vernon Presbyterian School in Atlanta changed its bell schedule to let students develop their own real-world projects—an innovation related to Transcend’s first Great Leap (focus of school). As a result, standardized test scores went up, and 85% of students wrote op-eds in favor of the approach (M. Cureton, personal communication, April 16, 2014). In 2014, 15 middle schools across five regions put resources from multiple classrooms into one open space where students could learn different skills at the same time, and at their own pace—an improvement linked to Transcend’s fourth (learning modes) and seventh (school community) Great Leaps. These students learned at rates that were 1.5 times that of the national mean ("Reimagining the Classroom," 2014). Lastly, in August 2016, American Institutes for Research reported
that students in 20 public and charter schools across the nation that offered innovations such as project based learning, group work, more student choice, and deep apprenticeship realized higher test scores, better graduation and college enrollment rates, better interpersonal skills, and more motivation to learn (Taylor, 2014). These are just a few examples.

**Barriers**

Despite the promise of breakthrough school models, to date, few schools can boast full integration of innovative methods à la the Eight Great Leaps, as obstacles are large and many. Currently in the field, there is widespread attention given to discrete, discipline-based standards that facilitate low-level learning expectations (Pearson, 2015). Many teachers and school leaders perceive that "covering" standards—that is, making sure students encounter and “master” standards—is both more important than and set apart from 21st-century education; and the perception is so strong it usually prevents them from taking on this work (Kay, 2014; Hong & Vargas, 2015). Compounding this reality, many current national and state funding and accountability models reinforce the emphasis on low-level learning expectations by focusing on compliance measures that include regular testing of discrete, discipline-based standards in ways that lead to low-level learning (Liss, 2013; Christensen, 2008; Wolk, 2010; Mehta & Fine, 2015).

Additional barriers slow those not impeded by the above dynamics. The boundaries between school and real life are nearly impermeable (Mehta and Fine, 2015). Teachers and school leaders who are ready to make the shift to 21st-century education have major challenges finding time to do so, collaborating with thought partners,
identifying resources and curriculum, and learning how to do so (Childress et al., 2015; Collinson and Fedoruk, 2001; Mehta & Fine, 2015). So far the field lacks consensus on how to assess—e.g., how to grade, monitor, and visualize progress—students’ social and emotional learning and on how to measure teacher learning as they prepare for this work (Frydenberg et al., 2017; Slemp et al., 2017). Most teachers in American schools were not taught this way (Cohen, 1988; Mehta & Fine, 2015), which makes the shift all the more challenging. Lastly, the fragmented and siloed approaches to education reform that exist today act as a barrier to bringing about meaningful transformation and improved outcomes for all students (Carnegie, 2016).

Exemplar schools

Thankfully, there are bright spots. Many schools are presently overcoming challenges associated with embracing 21st-century education. Some have extra help in terms of funding, political support, legal opportunities (e.g., charter- and voucher-friendly laws), or additional autonomy. While there is no exhaustive list of schools, we at Transcend collaborated with funders and other education intermediaries to compile a list of schools promoting 21st-century education. Such breakthrough schools are found in all sectors (public, private, and charter), in all regions (urban, suburban, and rural), and serve a full range of students, including those who have been historically underserved, such as English-language learners, special education, and low-income minority students. In my estimation, these schools seem to organize themselves around one or more of the following five orientations (Table 1), with the caveat that schools can take more than one of these orientations, and that there is some interdependence.
**Table 1.** — Orientations of breakthrough schools in the U.S.

<table>
<thead>
<tr>
<th>Orientation</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>A pedagogical orientation</td>
<td>Schools in this modality closely link 21st-century education implementation with robust delivery of some particular pedagogy, whether it is problem-based learning (e.g., the New Tech Network of schools across the U.S.), design-based learning (e.g., Riverpoint Academy in Spokane, WA, or Nueva School in Hillsborough, CA), place-based learning (e.g., Teton Science Schools in Idaho, or Chattahoochee Hills Charter School in Atlanta), or something else.</td>
</tr>
<tr>
<td>A capstone orientation</td>
<td>These schools have students participate in substantial projects, often self-directed and with public presentations, that require them to demonstrate mastery of, and apply content learned in traditional classes to solve a problem, make an argument, defend a thesis, or make a product. Examples are Envision Schools, the High Tech High network, or any of the maker schools.³</td>
</tr>
<tr>
<td>A personalization orientation</td>
<td>These schools are often competency-based and orchestrate learning environments where students learn at their own pace and may even pursue their own interests. Examples are Summit Public Schools, AltSchool, Acton Academy, and New York’s School of One.</td>
</tr>
<tr>
<td>A career-based orientation</td>
<td>Schools in this mode position real-world internships as integral components of the school week. Examples are Big Picture Schools, ConnectEd, and the Cristo Rey Network.</td>
</tr>
<tr>
<td>A curricular orientation</td>
<td>Schools with this focus incorporate 21st-century themes—such as global competitiveness; Science, Technology, Engineering, Arts and Math (STEAM); international cultures and/or languages; the environment; or social justice—into every part of the learning experience. Examples include Walter Bracken STEAM Academy in Las Vegas and Kearny High School in San Diego.</td>
</tr>
</tbody>
</table>

**Enabling conditions**

Lastly, what are the preconditions for breakthrough school models? What, if any, commonalities exist between the learning environments above as well as other successful breakthrough learning environments? While a handful of funders are currently organizing to understand the answers to these questions better, the field has yet to benefit from a

³ “Maker culture is part of a burgeoning movement in which individuals leverage modern digital technologies to produce and share physical artifacts with a broader community” (Cohen et al., 2016).
serious landscape analysis of breakthrough school designs. During and following the organization’s founding, however, the Transcend team researched innovative models and developed criteria for school partnerships that guide the selection of promising models (Table 2).

Table 2. — Transcend’s criteria for school partnerships

<table>
<thead>
<tr>
<th>Leadership</th>
<th>The leadership at the school- and district-/network-levels:</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>• Has clear and bold vision, reflecting many of the Eight Great Leaps;</td>
</tr>
<tr>
<td></td>
<td>• Has strong conviction and demonstrates willingness and ability to prioritize the work;</td>
</tr>
<tr>
<td></td>
<td>• Is courageous, willing to take smart risks, and to “unlearn” previous ways of thinking and doing; and</td>
</tr>
<tr>
<td></td>
<td>• Is capable, with relevant skills, knowledge, and a track record of success (especially in change management).</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Organization</th>
<th>The organization:</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>• Has the capacity to take on this work as a high priority initiative—strong leadership with capacity to dedicate to the project, buy-in from top-level leadership;</td>
</tr>
<tr>
<td></td>
<td>• Has the culture and systems conducive to innovation, e.g.,</td>
</tr>
<tr>
<td></td>
<td>o Appreciates the discovery and iteration process; willing to engage in build-test-learn cycle</td>
</tr>
<tr>
<td></td>
<td>o Has structures in place to allow for testing/piloting</td>
</tr>
<tr>
<td></td>
<td>o Has strong and trusting relationships in place with leaders, staff, students, and families; and</td>
</tr>
<tr>
<td></td>
<td>• Is willing to contribute to/collaborate on Transcend’s learning agenda.</td>
</tr>
</tbody>
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<tr>
<th>Environment</th>
<th>The organization exists in an ecosystem that is conducive to innovative design work; specifically,</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• A political landscape open to PK-12 innovation;</td>
</tr>
<tr>
<td></td>
<td>• A prevalence of potential funders, partner organizations, and talent; and</td>
</tr>
<tr>
<td></td>
<td>• The necessary decision-making authority.</td>
</tr>
</tbody>
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<tr>
<th>Core values alignment</th>
<th>The organization and its individual leaders are aligned to Transcend’s core values and culture:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• They see results for kids as the as the primary goal of innovation.</td>
</tr>
<tr>
<td></td>
<td>• They value diverse voices and share our deep belief in diversity, inclusiveness, and the key role of community, families, and students in a truly user-centered design process</td>
</tr>
</tbody>
</table>
• They **play big**, imagining bold possibilities and demonstrating courage and systems-thinking.
• They love and embrace **perpetual beta**, striving to be constant learners.
• They demonstrate a commitment to **long-term**, both in their goals for kids and their strategies.
• They do this work with genuine **love** and value the importance of relationships.

<table>
<thead>
<tr>
<th>Resource-ability</th>
<th>The organization will be able to assemble the human capital and financial resources needed for the project, either unilaterally or through joint efforts with Transcend.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Success (perceived and real) of innovation to date</strong></td>
<td>If the organization is already operating an innovative and promising model, then their innovation is perceived as successful by key stakeholders, and they have early results that demonstrate the innovation’s promise for a breakthrough model.</td>
</tr>
</tbody>
</table>

Source: Transcend, 2017

While the elements described in Table 2 are evolving and aspirational, they at least serve as a starting point for where strategic bets might be made to advance breakthrough school models. It is also important to note that the qualities described in the above list can occur in private, charter, and traditional public schools, which is a major reason why Transcend remains agnostic to governance structure in its pursuit of breakthrough school design.

Given the landscape described above, we might say that while innovative school design in the U.S. faces serious challenges, the combination of emerging consensus, nascent bright spots, diverse solutions, and promising early outcomes offers encouraging indicators that some future new way of “doing school” is around the corner. For Transcend, the landscape informs the kinds of relationships it might form in multiple ways:
• Proven innovators are potential sources of thought leadership, counsel, and partnerships;

• People who resonate with emerging conceptualizations of breakthrough school design (à la Hewlett and Transcend) are potential supporters, partners, early adopters, and raving fans;

• People who succeeded or failed while confronting various barriers and challenges are potential sources of knowledge, caution, and inspiration;

• Groups who have organized around unique innovative approaches are potential sources for diversity, cross-pollination, and, as communities consider adopting breakthrough schools, local choice; and

• Organizations that support this work but are not doing it themselves—such as Buck Institute for Education, Edutopia, P21, SCOPE and SCALE at Stanford, XQ Institute, and others—are potential strategic partners.

To gauge success, tracking the extent to which Transcend builds relationships with the above sources of assets as well as the depth of commitment of each can provide indicators for the health of its relational reservoir.

Thus far, I have explored reasons for Transcend’s relationship building and potential sources of relationships. What remains unclear at this point is why others would want to build a relationship with Transcend. Here is where Transcend’s assertion of acting as a research and development engine comes into play.
RESEARCH AND DEVELOPMENT (R&D)

As mentioned earlier, the traditional design of schooling—the “industrial model” where education is like an assembly line factory and one size fits all—was created for a different era. Despite decades of “reforms” such as choice schemes, standards and accountability measures, and governance model tactics, most American schools fail to prepare students academically, let alone address broader goals. Students from low-income backgrounds and students with learning differences are especially underserved. Even our highest performing schools struggle with long-term success for all students. On top of this, our world is changing fast. Our children need more than academic skills and content knowledge; they need learning mindsets, creativity, communication skills, collaboration abilities, and personal leadership. Together, these conditions call for fundamentally new learning environments—models built from the ground up as opposed to renovating the Industrial-Era model. Tweaks around the edges won’t cut it.

Although more and more educators are rallying to build breakthrough learning environments, examples are not enough. A new kind of knowledge needs to be developed—knowledge about how to create new schools for new times. While there are some aforementioned entities, such as Edutopia, the Buck Institute, and others that provide some information about progressive practices, there is no entity other than Transcend that is devoted to developing knowledge of and for new models. Because Transcend aspires to become such an R&D engine for the field—sharing knowledge about what does and does not work for breakthrough learning environments—a portion of this paper is dedicated to looking at R&D organizations from other fields to see what lessons can be transferred, and ultimately to determine the elements of a promising knowledge-share platform for Transcend. Further, unearthing these elements is critical, as
they will help Transcend frame its value proposition and bring clarity to what strategic partners it might pursue.

The term “R&D” usually refers to activities in connection with corporate or governmental innovation (NSF.gov, 2016), and there are two common models: one, where an entity, often in the context of an existing corporate or government organization, is staffed by professionals who develop new products; and two, where top scientists, often in the context of an intermediary, apply research in fields that may yield future product development (NSF.gov, 2016). Across industries, R&D organizations reveal:

1. The promise of convening and deploying top science experts to tackle ambitious research questions;
2. The power of helping practitioners overcome barriers and mitigate pain points—i.e., a real or perceived problem; and
3. The need for a learning agenda that guides the R&D organization to remain current.

The field of medicine has two relevant examples of R&D organizations: the National Institutes for Health (NIH) and UpToDate®.

Since Transcend endeavors to create knowledge for the education field, the NIH example, despite operating on a much greater scale, serves as an example for the kind of value (to others) that can be generated by knowledge creation. NIH’s mission is to seek fundamental knowledge about the nature and behavior of living systems and the application of that knowledge to enhance health, lengthen life, and reduce illness and disability (NIH.gov, 2016). Across multiple domains, the NIH uncovers, vets, and disseminates new medical knowledge with the goal of achieving outcomes around
treatment and prevention, economic growth and productivity, and workforce innovations. NIH is the “largest public funder of biomedical research in the world, investing more than $30 billion in taxpayer dollars to achieve its mission” (NIH.gov, 2016). In terms of operational capacity, NIH convenes and deploys scientists around the world and also employs 1,200 researchers and more than 4,000 postdoctoral fellows working at NIH labs in Maryland, North Carolina, and Montana (NIH.gov, 2016).

A world without NIH research is essentially a world with substantially less biomedical knowledge and, theoretically, worse outcomes. What should a world without Transcend look like? Just as NIH creates knowledge of biomedicine, how might Transcend create knowledge of innovative school design in such a way that yields compelling outcomes for the field?

In terms of research scope and scale, Transcend pales in comparison. But to the extent that Transcend links its knowledge creation with compelling outcomes, and then communicates that linkage, Transcend will successfully frame its value to its unique group of stakeholders: members of school design teams. And while efficaciousness is important, usefulness is yet another value Transcend’s knowledge building work can yield.

When it comes to creating actionable knowledge, the medical field’s UpToDate® is king. UpToDate® is an evidence-based, physician-authored “clinical decision support resource” which clinicians use to make what are known as “point-of-care decisions” (UpToDate.com, 2016). A “point-of-care decision” occurs when a clinician needs to care for a patient in real time. When a clinician with a subscription to UpToDate® has a question about patient care, they can, in real time, consult UpToDate®’s online platform,
read UpToDate®’s evidence-based, peer reviewed, user-tested recommendation, and let that “up to date” knowledge inform their decision and/or recommendation with their patients. The result is that patients receive the benefit of a multitude of physician experiences and perspectives, and not just that of a single provider.

What makes this “point-of-care” interaction unique is the dynamic of having (1) relevant, comprehensive, up-to-date medical research, (2) recommended applications of that research, (3) the clinician, and (4) the patient present in the same conversation experience. Presently, more than 1.1 million clinicians in 180 countries and almost 90% of academic medical centers in the United States use UpToDate® to provide care (UpToDate.com, 2016). Their clinical content spans 23 specialties and includes more than 10,500 topic reviews, each of which explores multiple clinical questions. Today, the company employs 53 doctors who hand-search, review, and incorporate research studies into the UpToDate® online platform of 470 medical journals. Not unlike Wikipedia, they also invite subscribers to send feedback and revise recommendations. Clinicians are given a voice in the vetting.

Multiple studies explore the effectiveness of UpToDate®. Isaac, Zheng, & Jha (2012) argue that hospitals using UpToDate® experienced shortened hospital stays, fewer deaths, and better quality performance than non-UpToDate® hospitals. No other platform garners as much usage.4 In 2016, UpToDate® unquestionably leads the field of medicine in research application and “point-of-care” decision making. UpToDate® is widely embraced because it helps clinicians overcome real and perceived barriers. Prior to UpToDate®’s recent growth, Choudhury et al. (2005) asked why clinicians did not pursue

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4 The company reports 23 million topic views per month.
answers to their questions about patient care despite the broad availability of online evidence resources that can answer these questions. Their findings indicated that clinicians pursued answers to only half of their actual patient care questions, and that clinicians lacking time and doubting that a helpful answer existed were the main barriers in pursuing such questions. Because an extremely high percentage of UpToDate® subscribers report that using the platform enables them to find high-quality answers and also saves them time—92% and 89%, respectively—the reasons for UpToDate®’s leading market share becomes clearer.

The comparison is not exactly a clean one because Transcend’s user base is different than UpToDate®’s. While UpToDate® serves clinicians, who might be considered the equivalent of teachers offering students “care,” Transcend serves school design team members, who are often administrators, school leaders, and district leaders, and are thus one level removed from students they are trying to serve. Still, the application for sharing knowledge applies. If Transcend, like UpToDate®, can figure out a way to give voice to school design teams, and to synthesize knowledge and make it imminently useful to school design teams in real time, then the extent of its contribution (and value) will be even greater to stakeholders in the field.

UpToDate® and Transcend—and NIH for that matter—are also creating different kinds of knowledge. One way of thinking about Transcend’s unique ambition to build knowledge—as well as the partnerships that advance and share it—is Stokes’ (1997) Pasteur’s Quadrant. Stokes advances three classifications of research built upon two critical features: a quest for fundamental understanding and a consideration of use. The classifications are illustrated in Figure 2.
Stokes names three scientists to illustrate his classifications. The epitome of a quest for fundamental understanding can be seen, Stokes suggests, in the work of Niels Bohr, a theoretical physicist whose studies portrayed little concern for application. The embodiment of applied research, which is focused on leveraging whatever knowledge is available to solve problems quickly and efficiently, is seen in the work of the inventor Thomas Edison. Lastly, the essence of research that searches for fundamental knowledge and that simultaneously seeks to solve a real world problem can be witnessed in the research of Louis Pasteur, the chemist and biologist known for discoveries related to vaccinations, fermentation, and pasteurization.

Each category of research requires different organizational orientations and strategies. NIH research truly spans all three sections of the quadrant in that it seeks pure basic, use-inspired, and pure applied research. UpToDate® makes use of pure applied research to give clinicians “point-of-care” recommendations; and it also conducts use-
inspired research as it listens to and hears from its clinicians, who provide feedback and pose real world questions. Transcend’s approach to knowledge is more similar to UpToDate®’s but slightly different. Transcend makes use of pure applied research to give recommendations to school designers; but, given the notorious teacher-research gap—i.e., the communication gap that neither teachers nor researchers seem to be able to bridge (Mehta, 2015)—Transcend also has its sights set on generating pure applied research for instances where basic knowledge has yet to be applied in meaningful ways for school designers. Additionally, at a fundamental level Transcend seeks use-inspired research in that is looking for underlying principles—and is posing these questions in its Eight Great Leaps—that are associated with how schools might operate in an Information Age. What Transcend’s knowledge-share objectives mean for relationships is not insignificant. Transcend must liaise skillfully and perpetually between researchers and school designers to apply research in familiar contexts, to generate research applications for new contexts, and to solve unresolved questions related to innovative school design.

When taken together, UpToDate® and NIH offer the following key lessons that can be transferred to Transcend:

- Knowledge creation requires convening a multiplicity of researchers and marshaling seriously robust sources of funding.
- Linking knowledge-sharing platforms to real-world impact and/or outcomes is critical for success.
- Knowledge-sharing platforms that save users time and that engender user confidence about quality content hold the most promise for growing an active user base.
• Making knowledge actionable also holds promise for growing an active user base.
• Inviting and integrating feedback into research improves knowledge and increases engagement.

The above takeaways are particularly salient, given the current status of education R&D, which lacks coherence. Unlike other fields such as medicine, which enjoys broader consensus on best practices and which leverages systemic mechanisms for creating new knowledge, there is no coherent system in place in the field of education to produce, evaluate, and spread knowledge about teaching and learning. In a paper I was honored to help produce, Mehta et al. (2015) describe four underserved functions that R&D in education now needs to serve:

1. *Producing knowledge*—Presently, researchers write mainly for other researchers; teachers with knowledge have few incentives and little support to share it. There is a great need to produce actionable, practical knowledge about teaching.

2. *Vetting knowledge*—The education field lacks mechanisms to evaluate whether knowledge is of any quality or of any use to teachers.

3. *Disseminating knowledge*—There are too few intermediaries that share knowledge with teachers in a user-friendly or accessible format.

4. *Using, testing, and refining knowledge*—R&D organizations in education need to stay in close touch with teachers and school leaders to ensure that what knowledge is being created is useful.
While there are organizations that are actively taking on the above challenges—most notably the Institute of Education Sciences (IES) and others\(^5\)—not one is as comprehensive as either NIH or UpToDate\(^\circledast\). Lack of funds might be the main contributing reason. While other fields spend 5-15% of their budgets on R&D, education spends a mere 0.25% (Bryk & Gomez, 2008).

Recently, some have argued for bold education R&D investments (Childress & Amrofell, 2016). But amidst a currently incomplete education R&D landscape, there is an opportunity for Transcend to add real value; namely, putting into educators’ hands the kinds of research resources they report needing, elevating the voices of teachers and school designers via feedback, and ultimately yielding better outcomes for stakeholders. Organizations with missions harmonious with Transcend’s—such as EdReports or EdSurge—also produce synthesized research in the education field, but are constrained by priorities that are necessary to maintain a sustainable business model (ad revenues, readership levels, and/or funder agendas). Transcend’s backers knowingly authorize a research process that does not begin with their own or even Transcend team members’ interests, but rather with what the user—members of school design teams, and ultimately students—needs. Just as UpToDate\(^\circledast\) begins with clinicians’ questions, Transcend first

\(^5\) The following U.S.-based organizations are, in some form or another, working to capture, codify, and make available to the field the learning that takes place as classrooms, schools, and/or districts transition from old to new approaches: EdLeader21; Transcend; IDEO; Learning Accelerator; Next Gen Learning Challenges; 4.0 Schools; the Students at the Center initiative at Jobs for the Future; Teacher Squared at Relay Graduate School of Education; Transforming Teaching, housed at the Harvard Graduate School of Education; Hewlett Foundation; Blank Schools; New Schools Venture Fund; High Tech High Graduate School of Education; Big Picture Learning; New Tech Network; Mount Vernon Institute for Innovation; TNTP; Summit Public Schools; Valor Collegiate; Pioneer Lab at Convergence Center for Policy Resolution; AVID; The Center for Transformative Teaching and Learning at St. Andrew's School; American School of Bombay; ReMake Learning Council; Council of Chief State School Officers; Springpoint; Maryland’s Education Development Collaborative (EDCo); Eton College (UK); 2Revolutions; and Deans for Impact.
asks members of school design teams what questions are currently most challenging, and then responds with customized, up-to-date, synthesized research, a process which essentially is the opposite of that of the NIH. Transcend’s research response covers the gamut of questions school design teams prioritize, such as curriculum, schedules, space, and more, as depicted in the diagram shown in Figure 3.

**Figure 3.** — Transcend’s school design blueprint

There is a key difference, however, between Transcend and UpToDate®: the scope of its user base. While UpToDate® seeks to answer the questions of all clinicians—and this is a key difference—Transcend’s user base is much smaller. Transcend seeks only to answer the questions of its network of forward-thinking school operators—i.e., those with the authority to make decisions related to school culture, curriculum, the quality and distribution of human capital, and the use of time and money—and to share those answers publicly and freely with any other interested partner so that they might also
benefit. While what knowledge is produced by Transcend is limited, still, stakeholders close to Transcend can get their most vexing questions answered, or at least answered as best as research reveals. To gauge effectiveness over time, tracking usage of insights, perceptions and attitudes of school design team members, activity of feedback loops, and long-term impacts can provide data on successful (and unsuccessful) implementations of Transcend’s R&D activities.

Having discussed rationale for Transcend reaching out to stakeholders, ideas for meaningful relationships, and ways Transcend might frame its own value, the next section explores two theories to inform how Transcend might exchange value. The first theory has to do with meeting users’ needs, and the second has to do with onboarding strategic partners.

INTEGRATING AROUND “JOBS TO BE DONE”

Reaching out to understand and meet stakeholder needs is critical if collaborative relationships are to be sustained throughout the long process of breakthrough school innovation. Put differently, as a new organization, Transcend needs a strategic approach to marketing, i.e., methods to understand its partners and allies, to segment stakeholder categories, and to build its brand. Prof. Clayton Christensen at Harvard Business School uses the term “jobs to be done” to describe a theory of innovation. Christensen’s theory examines the limitations of traditional marketing strategies, which strive to identify customer traits and demographics in order to sell a product, and approaches innovation from the point of view of the product’s “job to be done.” According to Christensen, Hall, Dillon, & Duncan (2016), “‘Job’ is shorthand for what an individual really seeks to accomplish in a given circumstance”—it looks deeper at the social and emotional
complexities of making a purchase and identifies how companies and service providers can solve the multiple problems that may arise from a single decision point.

In his Harvard Business School course, Building and Sustaining a Successful Enterprise, Christensen offers four ways to uncover a product’s “jobs to be done”:

First, it is crucial to carefully watch how people make use of a product. How and when are they wielding it? Are they somehow force-fitting it because it is the only option?

Second, what about people who do not use the product for their needs? What are they using in its place? What, if any, are the competing products?

Third, what are the compensating behaviors people are exhibiting with the product (and other products) to try and “make do” with all that they have available to them?

Fourth, and finally, why are people using what they are using?

In all, Christensen makes the case that deliberately exploring these four questions can lead to understanding of a stakeholder’s “jobs to be done.”

Once clarity is gained around a product’s “jobs to be done,” then Christensen argues three steps are appropriate to help an organization determine the activities or processes it should undertake and the outcomes it pursues:

1. Envision the experiences “in purchasing, using, and living with the product” that an organization needs to provide in order for stakeholders to get their job done perfectly;

2. Plan “what and how” the organization must integrate to provide the aforementioned experiences; and lastly,
3. Brand the product based on what it does well.

**Figure 4.** — Four levels in the architecture of a “job to be done”

The framework in Figure 4 provides a process to facilitate empathy in order to understand better the basic problem users are facing, the ultimate result they need, and, for the purposes of my work with Transcend, what direction stakeholder development should take and for what reasons. That is, identifying the “job to be done” in education can allow Transcend not only to improve its product—i.e., school models, research, and teams of R&D talent—but also to ensure real value is being exchanged. Tracking the committed vs. actual length of partnerships, referral rates (i.e., how many partners would recommend Transcend to others), stakeholder satisfaction with Transcend, and Transcend team member satisfaction (particularly around workload) can provide data about Transcend’s ability to exchange real value.
RESOURCES, PROCESSES, AND PRIORITIES (RPP)

Building new relationships will require more of Transcend, potentially causing transformation from within. The RPP theory helps an organization account for the cost of an endeavor before diving in, as well as adjust its capabilities as it takes on new challenges. For Christensen and Kaufman (2016), the RPP framework represents three groups of factors that “define what an organization can and cannot accomplish: its resources, its processes, and the priorities embedded in its business model” (p. 1). By definition, resources are (mostly visible and measurable) things that can be “hired and fired, bought and sold, depreciated or built” (p. 1). Processes are the methods of “interaction, coordination, communication, and decision making” through which people transform resources into valuable products or services. And priorities determine what an organization can and cannot do. Over time, the authors contend, people work together to address recurring tasks, processes become defined, and a business model eventually takes shape. A threat to organizational efficiency is for people to continue using established resources, processes, and priorities (RPP) to take on new challenges, when in fact, Christensen and Kaufman (2016) argue, organizations should be open to reconsidering whether they have the right RPPs for a new task. “Every innovation,” they posit, “entails creating a new resource, process, or business model, or some combination of these” (p. 5).

For Transcend, years two and three will see relationship building and collaboration rise to a new level. A temptation for Transcend will be continuing to leverage the resources and processes that have served Transcend well in year one. After deciding to exchange value—to build a mutually beneficial relationship—with a new entity, Transcend team members can adjust, or at minimum reconsider, Transcend’s RPP
to help ensure success. As an example, the building of Transcend’s talent force—which is projected to grow quickly from zero to hundreds of unpaid professionals who are motivated to connect with each other, associate with and learn from Transcend, collaborate on school partnerships, and find part-time work—should greatly impact the capacities Transcend builds and internal processes it embraces. Thus, tracking tweaks to the logic model at relational milestones—i.e., when Transcend forms a new partnership—can provide data to ensure RPP is being updated sufficiently.

Thus far, I have tried to demonstrate that a planned pathway to engaging with multiple stakeholders across various education sub-industries to shepherd widespread breakthrough school transformation is long and complex. To approach this work, and drawing on the components mentioned above, I offer up a vision for change (Figure 5).

**Figure 5.** — Theory of action in collaborating with Transcend’s stakeholders

<table>
<thead>
<tr>
<th>IF — I collaborate with Transcend team members</th>
</tr>
</thead>
<tbody>
<tr>
<td>• to illuminate connections between Transcend’s organizational resources, activities, and desired long-term outcomes;</td>
</tr>
<tr>
<td>• to identify cross-sector sources of value that are relevant to Transcend’s mission;</td>
</tr>
<tr>
<td>• to frame and communicate Transcend’s value to multiple stakeholder groups strategically and across the education sector; and</td>
</tr>
<tr>
<td>• to exchange value with stakeholders in alignment with Transcend’s current or emerging capabilities,</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>THEN — Transcend will</th>
</tr>
</thead>
<tbody>
<tr>
<td>• increase coherence among internal staff to undertake relevant community building activities—from recruitment and induction to collaboration and off-boarding—with current partners;</td>
</tr>
<tr>
<td>• ensure that current partners are and feel in fellowship with Transcend as they collectively pursue breakthrough school design; and</td>
</tr>
<tr>
<td>• increase its network by attracting new partners that are aligned with Transcend’s mission for breakthrough school design;</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SO THAT —</th>
</tr>
</thead>
<tbody>
<tr>
<td>• students and society are far better prepared for the 21st century.</td>
</tr>
</tbody>
</table>
THE STRATEGIC PROJECT

Building the kind of community that can support widespread breakthrough school transformation is intricate. From the outset, Transcend’s goal has been to build and codify a handful of breakthrough school models that scale to many schools across the United States. My work centered on ensuring that Transcend fostered the relationships and partnerships necessary to achieve the preconditions and intermediary outcomes that are present on the path of achieving that bold vision of spreading breakthrough school models. By the time the present document was written, 16 short months after Transcend’s inception, I had identified 23 separate stakeholder groups, each with a unique mission, strategy, and role to play in the field of school model innovation (Table 3).

Table 3. — Transcend stakeholder groups

<table>
<thead>
<tr>
<th>Definitions</th>
<th>Yellow Hats</th>
<th>Knowledge partners</th>
<th>School operators</th>
<th>Supporters</th>
<th>Strategic partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>R&amp;D talent staffing school partner projects and who build and sustain the Transcend org</td>
<td>Researchers who build and share Transcend’s learning agenda and insights</td>
<td>Innovators who lead breakthrough schools and networks and who forge school partnerships</td>
<td>Forward-thinkers who aid and follow Transcend activities</td>
<td>Mission-aligned orgs or individuals who publicly support Transcend and in some cases exchange resources</td>
<td></td>
</tr>
<tr>
<td>Teams within each stakeholder category</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Talent builders*</td>
<td>Knowledge builders</td>
<td>Pipeline builders*</td>
<td>Board</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partners</td>
<td>Insight advisors*</td>
<td>School partners</td>
<td>Funders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project leads</td>
<td>Scientific advisory board</td>
<td>Project teams</td>
<td>Advisory council</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project managers</td>
<td></td>
<td>Collaborative partners</td>
<td>Transcender Network*</td>
<td></td>
<td></td>
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<tr>
<td>Project talent</td>
<td></td>
<td>Network partners*</td>
<td></td>
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<td></td>
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<tr>
<td>On-deck talent*</td>
<td></td>
<td>Early adopters</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Domain* managers*</td>
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<td></td>
</tr>
<tr>
<td>Note: some people are on multiple teams, but each team has a unique purpose. * Names for internal use only</td>
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Definitions for each group in Table 3 can be found in Appendix A. Aligning these diverse groups for impact and somehow shepherding them were among my charges at Transcend. I was charged with directly overseeing the Transcender Network and select allies, champions, and influencers, which together accounted for less than 15 percent of Transcend’s stakeholder groups. Additionally, I was charged with supporting—but not overseeing—those Transcend team members who were charged with (and responsible for) directly shepherding the more than 85 percent of remaining stakeholder groups. This lopsided bifurcation meant that I had responsibility for outcomes without corresponding authority, and thus presented the challenge of leading informally to get my work done through others. To do so with fidelity, I embraced four ongoing activities:

1. Understanding Transcend;
2. Building with Transcenders;
3. Measuring for impact; and
4. Learning for growth.

In what follows, I will share the actions I took to shed light on results I did and did not achieve.

*Understanding Transcend*

Early on, I consumed as much literature about and by Transcend as I could. In addition to required onboarding materials, I scoured Transcend’s website, blog, and Google Drive for vision decks, strategy documents, partner criteria, norms, core values, videos, white papers, and more. I also read online media stories and social media mentions. At a team retreat that took place just before my residency began, I listened
more than I talked. I hopped on phone calls between Transcend team members and prospective partners or allies just to hear how they spoke about Transcend. I joined a board meeting to be a fly on the wall. At weekly check-ins, I asked my supervisor, Jeff Wetzler, enduring questions about the organization or my work. To summarize my learning, I practiced telling my family and friends about Transcend and asking them whether what I said was clear or not.

Eventually, to check my own understanding and to make Transcend team members feel heard and understood, I began to reflect back to teammates what I understood about Transcend’s mission, values, aspirations, and approach. Putting pen to paper, I made my thinking visible and invited others to add, subtract, or change what I had come to understand.

I then began to frame a series of essential questions related to my work of community building. The organizational materials, press, meetings, and phone conversations provided helpful but limited information. I thus began to form questions at the edges of my understanding. I wondered whether these questions, which were anchored in my theory of action, would unearth existing organizational viewpoints or inspire them. Either way, I perceived that framing inquiry and inviting others in for the journey would illuminate a way forward for my project. The following (theory-of-action-aligned) questions and sub-questions became the drivers for my project:

1. What are the connections between Transcend’s organizational resources, activities (i.e., processes), and desired long-term outcomes?
   a. What are the intermediate outcomes and preconditions necessary to achieve Transcend’s desired long-term outcomes?
   b. What stakeholder groups are critical for the Transcend mission?
      i. What do we name each group?
      ii. What does each group mean?
iii. What or who are examples within each group?
   c. How might we use technology (e.g., Slack) as a tool for collaboration internally?

2. What are cross-sector external sources of value that are relevant to Transcend’s mission?
   a. What is the current diversity of Transcend’s portfolio of partners?
   b. What groups or individuals possess capacities that Transcend lacks but that are critical to Transcend’s mission?
   c. What influencers in the field might help advance Transcend’s mission?

3. How might we frame and communicate Transcend’s value to multiple stakeholder groups strategically and across the education sector?
   a. What language and especially metaphors best relay Transcend’s value in the world?
   b. What are the most effective ways to unearth Transcend’s value among internal staff in ways that can be shared externally?
   c. What is the most compelling information we can put on the Transcend website and other collateral and for what reasons?
   d. What are the best vehicles and avenues for communicating to various stakeholder groups?
   e. How might we position our own team to advance Transcend’s value via the avenues and vehicles for communication that we create?

4. How might we exchange value with stakeholders in alignment with Transcend’s current or emerging capabilities?
   a. What are the jobs-to-be-done of possible partner organizations and individuals?
   b. How might organizations and individuals with whom we wish to partner be on-boarded and off-boarded?
   c. What are the essential activities for Transcend to do with respect to the various stakeholder groups, especially (for the purposes of my work) the broader community of people who are not directly connected to us—i.e., the people who read Transcend’s newsletter/blog and who follow Transcend on social media?
   d. How do we cultivate a movement for breakthrough school innovation?
   e. How might we crowdsource feedback on the Transcend learning agenda and insights?
   f. How might we use Slack as a tool for collaboration externally?
   g. What are indicators for success with the Transcend community?
   h. How might we ensure partnerships lead to results for kids, especially the most underperforming students and communities?
In a way, the whole of my residency was spent in pursuit of the above set of questions. I asked them in multiple ways, such as group calls, online collaborative documents, crowdsourcing tools, surveys, and one-on-one discussions. Because answers to these questions are both grand in scope and influential to the work of others, my next set of actions was indispensable.

*Building with Transcenders*

Building strategy and solutions with others is the key feature of my strategic project. Over the course of my residency, I invited every member of Transcend’s core team—i.e., Transcend’s partners, project leads, and project managers—to explore answers with me to the aforementioned set of questions. I checked in weekly with one of Transcend’s co-founders to ensure the questions being explored matched his and the organization’s priorities.

To chart ways forward among the sea of questions, I set up weekly check-ins with half the team and as-needed check-ins with the rest. I invited feedback on ideas and, as best I could, summarized collective thinking. With a few exceptions when I unintentionally forgot to do so, I let others know if their feedback or idea had not been incorporated into a revised plan. I brainstormed closely with team members to explore what nuanced activities and capacities were required for Transcend to reach its goals, and zoomed out with them to see where connections could be made, gaps filled, and changes considered.

Many changes were made. I co-created outcomes-focused, measurable, community building goals with the Transcend teammates who were charged with
shepherding certain stakeholder groups, but we changed the goals often throughout the course of my residency as we got clearer on the highest potential strategic bets.

Once decisions were made, I memorialized them in writing, shared them with the team, advanced the plan (or supported others to advance their plans), and, over time, tested the waters by measuring for impact.

**Measuring for impact**

Setting up a community map for Transcend and drafting a dashboard for community building were not easy tasks. Starting with the group of people with whom I had been entrusted—the growing group of people who read Transcend’s newsletter/blog and who follow Transcend on social media—I built a driver diagram to highlight all of the possible actions we could take with certain stakeholder groups, together with the underlying assumptions associated with each action, that would impact our long term desired outcomes directly (see Appendix B). Listing the assumptions served two purposes: to invite teammates to weigh in and judge the merit of each strategic bet, and to shed light on which metrics to track along the way so as to see if our bets proved true. With team input, I narrowed all possible bets and ultimately identified a set of key strategic bets to take with Transcend’s online community.

To test and measure the impact of the aforementioned strategic bets, and to build the community of people that follow Transcend on social media, newsletter, blog, etc., I devoted resources—time, treasure, and talent—to undertake key activities with that stakeholder group and to track our progress via certain indicators. While implementing
the plan, I made pivots—i.e., strategic adjustments—as we learned more about the merit of each strategic bet.

After going through the process of listing all possible intermediary-outcomes-focused strategic bets, soliciting team feedback, focusing on the most feasible and highest leverage strategic bets, monitoring progress, and pivoting when appropriate, I then took each teammate charged with shepherding a particular stakeholder group through the same process so that they might establish strategic bets, goals, related activities, and outcomes for their respective stakeholder group. To do this with fidelity, I conducted multiple one-on-one meetings with Transcend’s team members charged with overseeing stakeholder groups, posed relevant questions, captured their best thinking (even as it evolved over time), and made each teammate’s best thinking visible to the full Transcend core team both for feedback and for deeper understanding of community building strategy.

As promising strategic bets, drivers of outcomes, and key indicators were identified throughout the organization, I captured the results using a logic model template (Figure 6).

**Figure 6.** — Logic model template

<table>
<thead>
<tr>
<th>Inputs</th>
<th>➔ Activities</th>
<th>➔ Outputs (what to measure along the way to get to outcomes)</th>
<th>➔ Short, intermediate, and long-term outcomes</th>
</tr>
</thead>
</table>

Moving forward, I used the logic model as a discussion tool, primarily in the context of one-on-one check-ins, to interrogate our ongoing strategic bets, the status of our desired intermediary outcomes, the possible need to make changes, and any relevant future plans. Toward the end of my project, I conducted a survey with Transcend
teammates about the processes—i.e., the use of the logic model as a discussion tool, and the listing and narrowing of strategic bets—to see how well the processes aligned with Transcend’s core values and helped our community building efforts. The learning process, I hope to show, was rich.

**Learning for growth**

To maximize learning, I tested multiple strategies to undertake the aforementioned strategic activities, pivoted constantly, invited others to look at data, and reflected along the way. Thankfully Transcend core team members are required to share progress, plans, and priorities weekly, so a culture of sharing and reflection already existed. Having this record of wins, questions, and actions offered rich fodder for considering aspects of the work that needed attention or change. I created a chart (Figure 7) by mixing an existing structure within Transcend and my own reflections.

**Figure 7.** — Weekly progress chart for Transcend residency

<table>
<thead>
<tr>
<th>Week</th>
<th>Progress (from Week Before)</th>
<th>Plans for the Week</th>
<th>Trends &amp; Observations</th>
</tr>
</thead>
</table>
| July 4, 2016 | 1. Began Day 1 with Transcend! July 1, 2016. 2. Super helpful conversations with Jeff, Jenn, and Brittany about the work ahead. 3. Made significant headway on Onboarding checklist. 4. Productive conversations with Beth Rabbit (Learning Accelerator) and Christina Hinton (Harvard) who could be key resources/partners in this work. | 1) Finish onboarding. 2) Based on conversations with Jeff, Brittany and Jenn, iterate work plan, revise, and get final approval to move ahead. 3) Begin implementation of work plan. 4) Continue considering Capstone possibilities. | • Onboarding  
• Conversations with leaders of mission-aligned intermediaries  
• Understand & reflect back org needs                                                                                                                                                                                                |
| July 11, 2016 | Progress: Finished onboarding; Up to speed with Carnegie info; Built v1.0 Risk Analysis Tool for Brittany and Rob; Outlined workplan with milestones and got the go-ahead from Jeff, Brittany, and Jenn!  | 1) Build &/or iterate Community Asset Mapping Tool, Decision Making Audit Tool, & Risk Analysis Tool for Brittany and Rob; 2) Build & iterate Knowledge Base Community Map for Jenn; 3) Report v1.0 on Build-Measure-Learn cycles for Jenn; 4) Build & iterate Transcend Community Map for Jeff | • Describing/mapping the Transcend community  
• Carnegie connections - i.e., more conversations with leaders of mission-aligned intermediaries                                                                                                                                 |

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Reflecting on my work, I looked for patterns, outliers, longevity of certain tasks, and omissions.

As community building goals became clearer, I also revised my check-ins with teammates, usually adding weekly meetings to provide more consistent touch points with team members close to each stakeholder group. During check-ins, these “shepherds,” as I called them, shared their learning and pivots, and together we set revised goals. In all, I identified 13 shepherds of Transcend’s many teams. I made our collective thinking explicit in meetings with my supervisor, and made myself available to teammates who needed a thought or implementation partner in the community building work.

To ensure that the community building activities under my purview were advancing Transcend along the path of its longer term goals, I tracked assumptions and pivoted when data confirmed or contradicted our strategic bets. Further, I monitored occasions when Transcend teammates pivoted regarding the community building strategy for the groups they oversaw.

Before ending my residency, I created and shared a feedback survey with the Transcend teammates with whom I worked on this community building project. I also drafted and shared a roadmap for the organization to continue using the community building logic model as a tool to deepen thinking about relationship-focused priorities and to make strategic shifts as a team. In what follows, I will share results of the community building project.
RESULTS TO DATE

Strategic community building for Transcend yielded fruit, most above average and some below average, in service of Transcend’s mission. To illuminate results, in what follows I will consider each of the four parts of the original theory of action.

*Exploring connections between Transcend’s organizational resources, activities, and outcomes*

The process of uncovering connections between Transcend’s organizational resources, activities, and desired long-term outcomes for community building yielded new processes and priorities. The work of uncovering connections took two main phases. The first was mapping Transcend’s aspirational community of stakeholders—aspirational, in the sense that some of the stakeholder relationships had been formed while others had not yet been formed. Before I took on this work, leaders at Transcend had built a first version of a community map that included four broad stakeholder groups (Figure 8).
At the start of my residency, it was thought that the community map enjoyed alignment with Transcend’s mission, but lacked the clarity necessary for team members to take action steps to advance the exchange of value among organizations and individuals.

To build on this work, I collaborated with multiple team members to build a second version of Transcend’s community map (Figure 9).
The final product included significantly more detail around how Transcend might relate to each stakeholder group—i.e., what each group is called, how people on- and off-board within each group, what value is exchanged, group goals, and more. For the main stakeholder group under my care—the broader education community—I, in concert with voices across the core Transcend team, articulated the following goal:

To establish and grow vehicles and avenues for communication so that Transcend might (1) attract visionary school leaders interested in partnering with Transcend to design and launch new school models in the U.S.; (2) grow the pool of early adopters interested in spreading new, co-created breakthrough school models; (3) attract applicants interested in joining Transcend’s world-class R&D talent team and/or staff; (4) find and generate information that advances our learning agenda and insights; and (5) build and sustain a reputation as being on the vanguard of next generation school models.
Seven months after its creation, 100% of Transcend team members rated the above goal as “relevant” or “highly relevant” to the mission of Transcend.

With team input, I then identified the following four key strategic bets to take with the broader education community:

1. IF we share evidence for how others are overcoming the challenges and barriers to making the transition to the Eight Great Leaps, THEN we will persuade more mission-aligned visionary school leaders to use our R&D engine BECAUSE sharing evidence will increase our legitimacy and bolster confidence in our vision.

2. IF we publicly celebrate the wins from our vetted community, THEN we will increase excitement and interest in Transcend’s school models, talent force, insights, and partnerships BECAUSE an organization cultivates and replicates whatever it celebrates.

3. IF we share job and volunteer opportunities broadly, THEN we will attract the most mission-aligned, diverse pool of candidates from across public, private, and charter schools BECAUSE while our collective networks are more capable than our individual networks of connecting with prospective visionary school leaders from all sectors, they are not capable of attracting a sufficiently diverse group of public, charter, and private school leaders.

4. IF we invite the Transcender Network to give input on our learning agenda and insights, THEN we will improve the usability and effectiveness of our learning agenda and insights BECAUSE while our scientific advisory board, user testers, and knowledge builders do an excellent job at building and refining insights, their
capacity and perspective are limited and thus can be enhanced by an even broader and more diverse set of eyes.

To test and measure the impact of the above strategic bets, and to build the community of people that follow us on social media, newsletter, blog, etc., I devoted resources to undertake four key activities with that stakeholder group and to track our progress via certain indicators:

1. To share evidence for how others are overcoming the barriers to making the transition to the eight great leaps. Key indicator—social media engagement analytics;

2. To publicly celebrate the wins from our community of talent and partners. Key indicator—social media growth;

3. To announce Talent team and Transcend staff opportunities. Key indicator—job application statistics; and

4. To invite / crowdsource front-end input on all of our insights, tools, and resources. Key indicator—quantity of respondents and quality of feedback.

While implementing the plan, I made multiple pivots as we learned more about the merit of each strategic bet.

In addition to building and implementing community building strategy with the stakeholder groups in my care, I worked closely with Transcend team members to apply a similar process for the highest priority stakeholder groups. This collaboration, carried out over the tenure of my residency, resulted in a robust series of strategic bets and organizational activities for 13 additional stakeholder groups, raising the total number of stakeholder groups addressed to nearly 75% of all stakeholder groups. So as to co-create
strategy, I made sure that every single member of Transcend’s core team—including partners, co-founders, project leads, and project managers—built strategy with me as few as one and as many as 30 different times. The full view of co-created community building strategy was captured and can be seen in a logic model (see Appendix C). Of the team members that used the logic model with me to co-create community building strategy for the 13 additional stakeholder groups, 100% reported that the process was “somewhat helpful” or “helpful” to them in deciding and implementing their strategy. And 100% reported that going through the process brought “more coherence” or “much more coherence” to their community building efforts.

*Identifying cross-sector sources of value relevant to Transcend’s mission*

Determining new frontiers for Transcend to traverse was a winnowing process that, for me, felt broad at first, due to the fact the team was considering in what part of the education sector to invest, but eventually reached a focused direction that excited Transcend’s core team. Essentially, two parallel tracks served to unearth promising sources of value in the education sector. The first was Transcend team members gaining a better understanding of the field of innovative school model design. Coincidentally, near the time of my arrival as resident, Transcend’s co-founders commissioned another team member to do a comprehensive study of contemporary U.S.-based schools—private, charter, or district—with promising educational innovations and/or conceptualizations. I added substantive ideas and feedback to this process, and the resultant map of proven innovative schools—known internally as the Transcend database—has helped team members make referrals and offer guidance to inquiring school partners, project
managers, and project leads. The database will likely expand its own use cases in the coming months and years.

The second parallel track, to which I was able to contribute even more, involved Transcend’s co-founders and school pipeline team prioritizing next steps for school partners. As the year 2017 approached, Transcend’s pipeline builders team faced the decision to set the criteria for yet another (annual) round of school partner explorations. Having been charged with stakeholder development, I embraced the chance to add value to the decision and thus worked with Transcend’s school partnerships team to consider what private, charter, and traditional district school partnerships would be highest potential for Transcend.

Earlier on, I had been asked to join a series of ongoing school pipeline meetings in order to support the development and implementation of strategy. So, as this time neared for the school pipeline team to make formal decisions about strategic direction, I set out to help. Using online surveys, emails, Slack messages, and one-on-one video calls, I collected data about the diversity of Transcend’s current portfolio. Data collection examples include, but are not limited to, diversity regarding: school partners’ ambition to overcome the barriers to innovation identified in the Eight Great Leaps (see Appendix D); governance model (Appendix E); and the diversity of Transcend’s school partners’ leaders. Following data collection, I drafted a proposal for seven diversity goals for Transcend’s School Partner pipeline and shared them with the co-founders and school pipeline team (Figure 10).
Figure 10. — Seven proposed sacrificial school partner diversity goals

Diversity consideration: Will this partnership help us achieve our goals for diversity of partnerships and pipeline?

**IMPORTANT + URGENT**

- **Sacrificial goal #1** — Flexible learning spaces: Ensure that at least two (?) new school partners are *either* ambitious *or* extremely ambitious about moving from fixed classrooms to flexible learning spaces.
- **Sacrificial goal #2** — The Conditions Learning Agenda question: ensure that at least one new school partner is intentionally trying to explore the following Learning Agenda question: what conditions (political, social, etc.) and strategies can districts and school networks pursue to foster the creation and spread of innovative, learner centered models (learning environments/"schools") throughout their system?
- **Sacrificial goal #3** — More private schools: ensure that we establish one intensive private school partnership *OR* a new collaborative of private schools *OR* both.
- **Sacrificial goal #4**: — More traditional public school districts: ensure that at least 33% (?) of our new 2017 partners are traditional public school districts.
- **Sacrificial goal #5**: — A more diversified leadership pipeline: ensure that a greater percentage of our new 2017 partners include leaders of color.

**IMPORTANT + LESS URGENT**

- **Sacrificial goal #6** — Active parents: ensure that at least one (?) new school partners is *either* ambitious *or* extremely ambitious about active parents (from our Eight Great Leaps).
- **Sacrificial goal #7** — Ensure that at least one new school partner is intentionally trying to explore the following Learning Agenda question: what are the most effective ways to cause and sustain a paradigm shift among adults from a school-centered paradigm to a more personalized, student driven, learner-centered paradigm?

After discussion, the school partnership team embraced three (of the seven) diversity goals: increasing private school partnerships (goal #3); increasing traditional district partnerships (goal #4); and increasing the percentage of leaders of color (goal #5). The remaining four goals—which centered around learning priorities—were deemed less important and urgent than partnership priorities, in part because the original learning agenda was not yet complete—and thus were not taken up. Still, the process awakened organizational activities, such as seeking out new strategic partners and letting some
opportunities expire. Most importantly, the process inspired new priorities, as evidenced by Transcend’s leadership setting new direction and articulating mission around the new diversity goals. Though the new priorities described here reflect previous values held and ideas discussed at Transcend, their enactment led to multiple modified organizational processes including strategic recruitment, messaging, and selection criteria.

_Framing Transcend’s value proposition_

There is some evidence that my strategic project resulted in making Transcend’s work product more attractive to potential external partners. Throughout my residency, I owned multiple work streams aimed at framing and communicating how the work of Transcend solved an important problem in education. These work streams included making an overview video for the organization, building a new website, building and running the organization’s social media (Twitter, Facebook, LinkedIn, MailChimp newsletter, and YouTube), and applying for The MacArthur Foundation’s 100&Change grant. I also supported other Transcend team members on various projects aimed at framing and communicating Transcend’s value proposition, such as writing a three-page overview of the organization, building activities and a “run-of-show” for three convenings with School Partners, participating in a consortium convened by a national foundation, and contributing to the writing of profiles for talent opportunities.

Tracking whether the above actions led to Transcend building and sustaining a reputation as being on the vanguard of next-generation school models is difficult. Earned media is one metric I was able to capture, however. During my residency, Transcend was
mentioned seven times in the media: thrice by EdSurge, once by Re-envisionEd, once by Inside Philanthropy, once by Education Week, and once by Harvard Ed Magazine.

Reactions from funders was another piece of evidence. Unfortunately, we did not win the MacArthur grant; feedback was that the project was at too early a stage in its evolution. There was not, in their view, sufficient evidence to evaluate the effectiveness of our proposed solution, and the time horizon was likely to extend beyond the parameters of the 100&Change program. Still, MacArthur agreed to include an executive summary of our proposal in materials shared with other funders. We had greater success with the consortium convened by the national foundation, a project I undertook with two other Transcend team members for which we worked in concert with other intermediaries to tackle the challenge of fragmentation in the education sector. The consortium led to continued work with the foundation and its collaborators to develop the original ideas we presented, which essentially centered around Transcend’s value proposition.

Additionally, Transcend’s social media channels realized impressive growth. Longitudinal growth of Transcend’s social media vehicles, most of which I created and all of which I ran, can be seen in Table 4. Transcend’s social media growth compared to industry benchmarks are shown in Table 5.
Table 4. — Transcend social media statistics, Jul. 2016 to Feb. 2017

<table>
<thead>
<tr>
<th>Description</th>
<th>JULY</th>
<th>JUNE</th>
<th>SEPT</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
<th>JAN</th>
<th>FEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter (followers)</td>
<td>0</td>
<td>137</td>
<td>269</td>
<td>377</td>
<td>450</td>
<td>510</td>
<td>585</td>
<td>658</td>
</tr>
<tr>
<td>LinkedIn (followers)</td>
<td>124</td>
<td>162</td>
<td>210</td>
<td>224</td>
<td>230</td>
<td>250</td>
<td>267</td>
<td>281</td>
</tr>
<tr>
<td>Facebook (likes)</td>
<td>32</td>
<td>450</td>
<td>475</td>
<td>484</td>
<td>500</td>
<td>520</td>
<td>548</td>
<td>670</td>
</tr>
<tr>
<td>Newsletter subscribers</td>
<td>843</td>
<td>900</td>
<td>967</td>
<td>1109</td>
<td>1513</td>
<td>1766</td>
<td>1856</td>
<td>1891</td>
</tr>
<tr>
<td>Website unique visitors</td>
<td>838</td>
<td>1463</td>
<td>1458</td>
<td>1604</td>
<td>1822</td>
<td>1573</td>
<td>1359</td>
<td>2164</td>
</tr>
<tr>
<td>Newsletter opens</td>
<td>n/a</td>
<td>n/a</td>
<td>480</td>
<td>671</td>
<td>847</td>
<td>789</td>
<td>830</td>
<td>967</td>
</tr>
<tr>
<td>Newsletter open rate (%)</td>
<td>n/a</td>
<td>51</td>
<td>43</td>
<td>44</td>
<td>50</td>
<td>44</td>
<td>45</td>
<td>49</td>
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<tr>
<td>Education Avg. 21.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Newsletter click rates (%)</td>
<td>n/a</td>
<td>13</td>
<td>14</td>
<td>9</td>
<td>7</td>
<td>5</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>Education Avg. 2.63%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Klout Score</td>
<td>10</td>
<td>20</td>
<td>30</td>
<td>49</td>
<td>52</td>
<td>51</td>
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<tr>
<td>Youtube total views</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100</td>
<td>144</td>
<td>185</td>
<td>189</td>
</tr>
</tbody>
</table>

Table 5. — Transcend social media growth vs. industry benchmarks, Jul. 2016 to Feb. 2017

<table>
<thead>
<tr>
<th></th>
<th>Nonprofits (with median email list size of 186,623)</th>
<th>Transcend (with email list size of 1,858)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ratio of Facebook fans to email subscribers</td>
<td>.36</td>
<td>.36</td>
</tr>
<tr>
<td>Facebook engagement rates⁹</td>
<td>244</td>
<td>290</td>
</tr>
<tr>
<td>Annual change in number of Facebook fans</td>
<td>10%</td>
<td>1,962.5%</td>
</tr>
<tr>
<td>Ratio of Twitter followers to email subscribers</td>
<td>.13</td>
<td>.37</td>
</tr>
<tr>
<td>Twitter engagement rates*</td>
<td>1.6%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Annual change in number of Twitter followers</td>
<td>25%</td>
<td>62,500%</td>
</tr>
<tr>
<td>Email list size change</td>
<td>14%</td>
<td>120%</td>
</tr>
<tr>
<td>Email newsletter open rate</td>
<td>21.2%</td>
<td>46.2%</td>
</tr>
<tr>
<td>Email click-through rates</td>
<td>1.4%</td>
<td>10.1%</td>
</tr>
</tbody>
</table>

*Engagement rate for Twitter includes clicks, comments, shares, retweets, likes, and other actions.

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⁶ In this chart, “open rate” refers to the percentage of emails opened by subscribers, whereas “click rate” is the percentage describing how many successfully delivered emails registered at least one click.
⁸ As of Tuesday, February 7, 2017
⁹ Calculated as (daily total reach ÷ total likes on the page) × 1,000
In summary, earned media, funder feedback, and especially social media statistics reveal connections between the work of the strategic project and increased attention to Transcend’s value proposition.

*Exchanging value with stakeholders*

During my residency, the Transcender Network—again, people connected to Transcend indirectly through communications channels and vehicles—grew from ≈1,000 to ≈3,256 people (or 225.6% growth). Roughly 20% (up from <10% last year) of the organizations whose leaders expressed interest in school partnerships came to Transcend not via an existing relationship, but rather via word of mouth or one of our communications vehicles (e.g., website, Twitter, Facebook, newsletter, etc.). Likewise, 85% (up from ≈50% last year) of the people who applied to join Transcend’s world-class R&D talent team and/or staff came to Transcend via word of mouth or through one of our communications vehicles. With the launch of the new website, I incorporated improvements related to telling Transcend’s story and created a way to generate information (from website visitors) that can be used by Transcend’s knowledge building team to advance the organization’s learning agenda and insights. Furthermore, between July 2016 and February 2017, Transcend’s Klout score—an indicator of online reputation and impact—grew from 10 (beginner) to 54 (intermediate/advanced) as a result of engaging the broader education community.

Over the same time frame, ten new organizations (i.e., "early adopters") expressed interest in adopting and adapting Transcend-supported breakthrough school models. All of those organizations came to us through an existing relationship, not via word of mouth or through one of our communications vehicles. It was determined, however, that this
reality was welcome at this early stage as Transcend continues to iron out its model for adopting and adapting breakthrough school designs. In fact, we explicitly determined not to grow Transcend’s broader network too quickly because Transcend was at such an early stage. Rather, we determined that if Transcend were to have staying power in the field, then it needed to engender confidence by delivering on its early promises to its first stakeholders.

To learn whether these partners perceived that value was being added to their organizations as a result of their collaboration with Transcend, we can look to a series of 37 indicators that I co-created with Transcend’s shepherds, individuals charged with shepherding the relationship between Transcend and certain stakeholder groups. All of these indicators were captured in the community-building logic model (Appendix C) constructed during my residency. More than 80% of these indicators have goal deadlines that extend beyond the writing of this document, mainly because the process to co-create these indicators took months, and thus are yet to be determined. Moreover, the vast majority of the indicators that were created are year-long in scope because Transcend shepherds reported drafting indicators in alignment with one of Transcend’s core values: long-term impact. That said, despite not knowing growth against these indicators, by the writing of this document half of Transcend’s shepherds reported that they were “most likely on track” or “definitely on track” to reach their year-long goals.

The remaining 20% of indicators pertains to the stakeholder group following Transcend on social media, because I purposefully included a timeline that concluded within the timing of my residency. Those social media outcomes, which have already been mentioned in the previous section, reveal above-average to exceptional levels of
engagement as compared to industry standards. The path to achieve those outcomes was not uncomplicated.

In all, I pivoted more than 20 times related to the community I oversaw—the group of stakeholders following and engaging with Transcend online. Examples of major pivots include the following highlights:

- Reducing the number of strategic bets from 20 to four;
- Increasing the frequency of newsletters sent from quarterly to monthly;
- Increasing the number of influencers willing to promote Transcend content online; and
- Revisiting and increasing the number of strategic bets from four to five.

Examples of minor pivots include the following highlights:

- Reducing the average number of social media posts daily from six to 3.5;
- Increasing the frequency of blog posts published from intermittently to bi-monthly;
- Increasing the number of blog postings on social media from not at all to bi-monthly;
- Increasing the number of guest blog posts over time; and
- Creating and later abandoning a particular ineffective crowdsourcing tool.

In addition to my own “tweaks” in strategy, my teammates adjusted as well. I counted at least 40 ways in which other Transcend teammates pivoted regarding their community building strategy, including, but not limited to, the following changes:

- Moving away from Slack and toward email as a communication tool for our collaborative partners;
• Adding an online platform as a collaboration tool for Yellow Hats;
• Sending swag to those advising our research and development process; and
• Adding bi-annual phone calls with scientific advisory board members to thank them and connect their contribution specifically to student outcomes in Transcend partner schools.

One particular major pivot was made that impacted many work streams. Roughly halfway through my residency, it was determined that Transcend’s talent force in building breakthrough schools—the Yellow Hats League—be made invitation-only rather than by application. The main reason for this change was to ensure the group size aligned with our internal capacity. A secondary reason was that we wanted to avoid having to reject applicants. We worried that rejecting interested individuals might work against our core mission by quelling enthusiasm about the very thing about which we were excited to cultivate enthusiasm: breakthrough school design. Thus, it was determined that emphasis should be placed on making the Yellow Hats beta experience top notch for a select group of mission-aligned individuals.

That change, or update, in emphasis to the Yellow Hats League not only informed our plans for recruiting, onboarding, and sustaining of this group, but also affected our plans for other groups. That is, the emphasis on selectively cultivating a top-notch Yellow Hats team meant that any additional organizational community-building capacity would be devoted to that priority for the short term. Thus, with regards to community-building capacity for any other stakeholder group, including the external stakeholders under my care, we opted for a more modest set of community-building goals. Put differently, until users’ experiences of the newly launched Yellow Hats League were of
the highest quality, then other community-building work, which required organizational capacity Transcend did not have at the time, can wait. This decision to be modest led us to shrink the pool of strategic bets we could be making and instead focus on those we decided had the most feasibility and highest potential to impact our long-term desired outcomes. This dynamic of getting clear on goals for one group having an effect on goals for another was something I navigated multiple times during my residency as community manager at Transcend.

In summary, the above results reveal that the process of (1) illuminating connections between Transcend’s organizational resources, activities, and desired long-term outcomes; (2) identifying cross-sector sources of value that are relevant to Transcend’s mission; (3) framing and communicating Transcend’s value to multiple stakeholder groups strategically and across the education sector; and (4) exchanging value with stakeholders in alignment with Transcend’s current or emerging capabilities led to:

1. Moderately strong coherence among internal staff to undertake relevant community-building activities with partners;

2. Favorable, but as of yet inconclusive, evidence that current partners find it advantageous to work with Transcend as they collectively pursue breakthrough school design; and

3. Strong evidence that Transcend’s network is attracting new partners to advance its mission for breakthrough school design.

Why things happened the way they did is the focus of my next section.
ANALYSIS

To analyze the strategic project, I will weigh successes and struggles against the Framework for Analyzing Work Groups (Hill, 1995) (see Figure 11). This framework was specifically envisaged for entrepreneurial entities, and it provides a lens through which entrepreneurial leaders can analyze complex organizational challenges and opportunities and identify potential levers for change. Specifically, the model “describes contextual factors, design factors, and emergent culture as determinants of group behavior and performance,” and it depicts “emergent behavior, norms, roles, and rituals as aspects of group life” (p. 1).

Figure 11. — Framework for analyzing work groups

Source: Hill, 1995

Coherence among internal staff

Achieving coherence among internal staff to undertake community building activities was critical for my project because, as I mentioned earlier, I only had direct
authority to undertake community building activities with a small subsection of the broader Transcend community. In the end, my work to lead informally—i.e., to get community-building work done through others—resulted in only moderately strong coherence among internal staff to undertake relevant community-building activities with partners. Three reasons describe the successes, and three reasons reveal the struggles.

Regarding successes, a moderate, foundational level of coherence among internal staff to undertake community building activities was achieved thanks to a series of contextual factors (organizational history and strategy), group composition factors (competencies and working styles), and group culture factors (values, norms, and rituals). As mentioned previously in the Strategic Project section, a community map was articulated by one of Transcend’s co-founders, shared with the full team in person, and connected to my work on the very first day of my residency. This internal articulation formally launched community mapping in the history of this young organization, breathing life into early next steps such as the development of strategy and of further articulations. With the co-founder having attached my name to the initiative, I found all Transcend team members welcoming in every conversation I initiated with them about community building. Further, prior to my residency, Transcend had articulated measurable long-term goals, which conveniently served as outcomes to which any and all of our community building strategy could be oriented and driven.

A degree of community-building coherence among Transcend staff can also be attributed to the competencies and working styles of my Transcend teammates. Once I initiated community building conversations with those “shepherds” who were tasked with recruiting and cultivating certain stakeholder groups, I discovered that each had made an
early version plan, had begun the work with some degree of success, and, to varying
degrees, had integrated community-building activities into their regular work patterns. As
examples, when I began this work, no funder had yet (nor have they) withdrawn their
support, candidates for the Yellow Hats League were coming in, school partners were
sharing positive qualitative feedback, and the net promoter scores (NPS) of a particular
group of Transcend’s school partners were extremely high.\(^\text{10}\) Thus, early on it became
clear to me that I was building on great work.

Another factor that helped lay the foundation for community-building coherence
among teammates was Transcend’s culture. Love is a core value for Transcend:
“Relationships and genuine connection are at the heart of our work” (Transcend, 2017).
Thus, there was already an expectation to take a relationship-centered approach to reach
an ambitious goal of spreading breakthrough school models. Also, early on, team
members articulated a norm that facilitated the co-creation of a community-building
strategy: “Tell me not only what you’re doing, but how you’re doing it—narrate the
process.” That is to say, as team members built their own strategies, they made their
thinking and processes explicit for the rest of the team on a regular basis. This had the
effect of some team members borrowing good ideas from other team members. For
example, the knowledge-building team borrowed the net promoter score concept from the
collaborative team. In all, I counted more than ten ways that team members borrowed
ideas from one another. Two organizational rituals served as the vehicles for this idea

\(^\text{10}\) NPS is a widely used measure of organizational strength. On a scale of 1-100, many successful
corporations/organizations have an NPS that is in the 50s or above. At the start of my residency, the
NPS for ten of Transcend’s school partners was 76.5.
sharing: the weekly team check-in meetings, and, more broadly, one-on-one check-ins with individuals.

Struggles to build community-building coherence among team members resulted from aspects of formal organization (structure and staffing), of group culture (emergent activities), and of effectiveness (performance). With regards to the former two, in short, a number of emergent activities became competing priorities, which meant that community building did not always get the attention it deserved. Allow me to explain.

Transcend’s organizational structure includes four main work streams:

1. Build school models—building and spreading innovative models in partnership with visionary school communities;
2. Build talent—building and deploying a diverse force of R&D talent, called the Yellow Hats League, to develop, codify, and spread these new learning models;
3. Build knowledge—building and sharing actionable knowledge to inform the innovation process with evidence-based insights; and
4. Build the organization—building and sustaining a reputation as being on the vanguard of next-generation school models.

Community building for Transcend is related to all four of the above work streams because its network of stakeholders includes both internal and external partners, and because Transcend team members in each of the four work streams collaborate with others (individuals, groups, and/or other organizations) to operate. Not only was I assigned to coordinate community-building efforts across all four components of Transcend’s structure; I was also assigned to work on other things. Specifically, I took on work related to “build knowledge” by doing research, authoring insights on synthesized
research reviews for various questions from Transcend’s learning agenda, and providing feedback on insights authored by other teammates. I also took on work related to “build talent” by recruiting top talent to apply to Transcend, to “build the organization” by fundraising, and, substantially, to “build school models” by leading Transcend to explore partnerships with no fewer than 14 schools and/or intermediaries in the private school sector. Roughly one-third of my time was allotted for community building.

While I enthusiastically welcomed this additional work, a trade-off was time spent on community building. I simply had fewer collaborations with some community “shepherds” as I could have. As a result, I prioritized stakeholder groups based on three criteria: responsibility, as in which groups were under my care; importance, as in which groups garnered the most energy and interest from our co-founders; and urgency, as in which groups were crucial to meeting specific organizational goals by March 2017. Our co-founders recognized that some stakeholder groups, such as the Transcend governing board and advisory council, respectively, required less attention because there were already community-building processes in place before my residency or because the act of exchanging value inherently used a lighter touch. The fact that community-building strategy with these two groups remain more or less unchanged serves as evidence that some groups were prioritized over others.

The other struggle relates to my own performance: I failed to simplify community building conceptually for our team members. Though I researched multiple community-building visuals and frameworks—for example, from Gates Foundation, The Community Roundtable, Get Satisfaction, and others—in the end, I regarded them as insufficient to represent Transcend’s web of existing and emerging relationships. Instead, I modified the
original visual and framework given to me when I entered the organization, and layered on stakeholder groups as I observed more teams with unique roles that were not yet represented in the Transcend community map. Though I still think these additions are helpful, I was unable to bring full coherence among the team as evidenced by teammates’ survey comments such as “I think the recent idea to think of some consolidated metrics we care most about around community-building is a good push. So, I guess…‘Simplify.’”

Another comment: “The deck itself was a bit massive and difficult to take in across the stakeholder groups...I think it would be great to have goals around a coherent community building effort (in addition to the social media goals).” These and other comments reflect a feeling that adding to the original framework made it overly complex, unclear, and hard to follow.

*Transcend stakeholders being and feeling in fellowship*

Group composition (competencies) and context (organizational history) explain the promising early indicators that Transcend stakeholders feel in fellowship as the network pursues breakthrough school design, while task design (required activities, interactions, and interdependencies) explain why these indicators are inconclusive.

The promising early indicators of the success of community building efforts—such as excellent net promoter scores and strong social media engagement levels—resulted from the work of highly competent individuals being placed in charge of achieving the goals for these respective groups. For example, Transcend’s co-founders matched the proven facilitation experience of a few of its teammates with the organization’s school partner needs; the manifest human resource skills of a Transcend
teammate to lead with the development of the organization’s talent cloud; and my social media experience, which was the deepest on the team, with the organization’s social media needs. In other words, Transcend’s co-founders recruited and empowered “shepherds” who had not only demonstrated acquired attributes related to the task, but who had demonstrated the ability to “acquire the attributes needed for future situations” (Christensen, 2000).

These promising community building early indicators also resulted from an important aspect of Transcend’s organizational history, namely, the prevalence of preexisting relationships. The majority of Transcend’s earliest staff and partners came from another national nonprofit in which Transcend’s co-founders served as senior leaders: Teach For America (TFA). Leaders of many of Transcend’s first school partners were former TFA colleagues, and initially, a high percentage of Transcend staff were also. In an interview, one Yellow Hat told me “Transcend felt like a TFA reunion.” Moreover, I heard Transcend core staff members describe the TFA-Transcend connection no fewer than 15 times over the course of my residency. While the organization’s partners aspire to broaden the scope of Transcend’s network far beyond TFA in future years, I observed that feelings of fellowship, familiarity, camaraderie, and trust were residual benefits of the TFA-Transcend connection.

The promising community-building indicators are inconclusive as of yet because there is still a need to tweak Transcend’s task design for required activities, interactions, and interdependencies, to include community-building processes in the organization. Specifically, monitoring the perceptions and attitudes of Transcend stakeholders is not yet baked into the DNA of the organization. During my residency, “shepherds” of
Transcend’s stakeholder groups and I developed goals for 70% of the Transcend community. Moreover, of the stakeholder groups for which we developed desired outcomes, a few “shepherds” of those groups still need to build ways to track progress. Thus, there is a need not only to develop goals for the remaining 30% of stakeholder groups, but also to develop progress monitoring for 30-plus percent of stakeholder groups. When we have a more complete dashboard and, at a more fundamental level, when we achieve greater coherence among team members for the why of community building, then will we be able to say reliably that a robust community is being built across the Transcend network.

**Attracting new partners**

Transcend’s network grew substantially during my residency for reasons related to context (organizational strategy) and effectiveness (performance). That is, potential school, talent, and knowledge partners regularly reported over the course of my residency that Transcend’s organizational strategy was both important and urgent for the education sector. This feedback came at convenings, at conferences, on social media, on phone calls, in fundraising meetings, and more. Anecdotally, the education field seems to resonate with the idea that we are on the cusp of a new era in education. Summit Public Schools (www.summitps.org), whose founder serves on our board, is a contemporary proof point that when new school models are promising and well codified, they can spread rapidly.

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11 Noteworthy groups to which community goals have yet to be co-created and assigned include the governing board, advisory council, and Transcend partners.

12 Noteworthy groups for which we still need to develop community-building progress monitoring systems include stakeholder groups in the “build knowledge” part of the organization.
I also attribute Transcend’s expanding network to how effectively the organization implements its strategy. Earlier in this report, I referenced how innovative learning environments are delivering on both innovative as well as traditional measures such as test score proficiency. A case study of Transcend’s first partner school, Achievement First (AF) Greenfield in Connecticut, links Transcend’s design and implementation process to successful innovative and traditional student outcomes (Sawch, 2016). On the more traditional front, 93% of kindergartners who were enrolled in the AF Greenfield pilot school, according to the same case study, scored “proficient” in reading and 27% scored “advanced.” Also, the school’s 5th-grade English and math scores are higher than at all comparable Connecticut middle schools.

Regarding more innovative measures, teacher, student, and parent feedback reveal promising growth on indicators other than academics. For example, some teachers who had participated in piloting innovative features—such as self-directed learning, student goal teams, and learning expeditions—voluntarily decided to adopt elements of the model on an ongoing basis after the pilot, and “even without support from the Greenfield team” (Sawch, 2016, p. 5). Further, Sawch writes:

In surveys and interviews, students shared excitement about their engagement and learning in ways that suggested the power of the model. One student reported that being “a strong student means also to teach yourself and go beyond the boundaries of learning.” Parents raved as well. When describing her child’s experience during the pilot, one 5th grade parent noted that her son “made more progress this week than I’ve seen him make all year. It’s like a light came on (p. 5).

In all, Transcend’s first partner school, though not perfect, is successful enough to have inspired other school leaders to want to partner.

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13 In fact, Sawch does a stellar job of revealing the school’s growing pains.
In addition to AF Greenfield, Transcend’s other initial partner schools—Valor Collegiate in Nashville, Montessori for All in Austin, TX, and others—are strong candidates for successful innovation. While their student outcomes are forthcoming, these schools, which became partners as a result of Transcend’s strategy, already exhibit proven leadership excellence, environments conducive to innovation, organizations capable of change management, and resource-ability, as evidenced by a rigorous internal scoring method during Transcend’s school selection process.

Task design (required activities and interactions) is the main reason that Transcend’s acquired network, as opposed to its inherited network, grew exponentially (225.6%) during the course of my residency. Prior to that, social media was no one’s responsibility, with the exception of two email newsletters that had been sent out over the course of the previous 12 months. By explicitly giving this responsibility to me, even among other responsibilities, and by approving the creation of new vehicles and avenues for communication, Transcend’s co-founders ensured community expansion. I attribute the fact that we beat every industry norm for social media engagement to two reasons.

First, there is evidence that the ongoing sharing of high-quality content related to aspects of Transcend’s learning agenda successfully addressed pain points experienced by forward-thinking school design teams. In fact, apart from celebrating the wins of partner schools, content related to aspects of Transcend’s learning agenda garnered the most attention and engagement.

Second, there is evidence that the identification of and partnership with social media influencers outside of the Transcend network who volunteered to disseminate or

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14 The learning agenda was created following interviews with school partners, funders, and researchers to identify the most unresolved, vexing questions faced by school design teams.
promote Transcend content contributed significantly to the expansion of Transcend’s existing network.

IMPLICATIONS

Implications for site

Clearly there is community-building work still to be done at Transcend. Strategy, and a way to monitor the success of that strategy, needs to be built for approximately 30% of Transcend’s stakeholder groups. Four groups need special attention: the governing board; the advisory board; early adopters; and allies. How the Transcend community is best conceptualized and visualized remains another priority. On that front, simplicity will be key. Further, while Transcend has increased the quantity of supporters who publicly promote Transcend online, there is room to grow the pool of influencers.

Another important consideration moving forward is online fundraising. Nearly half of nonprofits (~47%) “find that the pinnacle of engagement is a donation” (Creedon, 2015). During my residency, online giving capability was created but not harnessed. Moving forward, Transcend can set online fundraising targets.

There is also a need to monitor the progress of a community-building strategy that was built during my residency. Many of the process that were built are just now “firing on all cylinders” within the organization. Whether or not these processes lead to Transcend’s longer-term outcomes remains to be seen, and thus should be tracked and revisited periodically. Community building at Transcend will be well served to the extent that an eye is kept on the diversity of Transcend’s portfolio, and that strategy and capacity are tweaked accordingly.
There are multiple exemplary community-building artifacts and systems that can potentially be parlayed for success in other parts of the organization and ultimately become shared conventions, such as Transcend’s “funder touch-point calendar,” the Yellow Hats League qualitative surveys exploring the value-add of participating in the League, and the collaborative’s convening survey with net promoter scores.

Lastly, there is the question of whether to increase organizational capacity around community building. Given the results of this strategic project, with the current level of capacity we might expect in the future: moderate levels of incoherence among staff attitudes and perceptions of community building activities; continued network expansion overall; and emerging clarity as to whether Transcend partners feel in fellowship with a movement to design and spread breakthrough school models. This report also provides some evidence that increased capacity for community building will be required when there is a desire to attract school leaders and partners who will adopt and adapt models. That reason alone is enough to for me to recommend increasing capacity internally for community building, as the spread of breakthrough school models is core to Transcend’s mission.

More broadly, I would say that my residency unearthed a fundamental difference and an ongoing tension between separate visions for movement building vs. community building. The latter unquestionably garnered the bulk of my attention. As I made sense of Transcend’s longer-term goals related to the design and spread of breakthrough models, and as I looked at the fast-growing group of people in the education field that this young nonprofit was trying to serve, I surmised that Transcend would be better served by making sure that it could deliver on its early promises to its myriad burgeoning
stakeholder groups and that it could produce raving fans. To me, this seemed like foundational work to ensure long-term legitimacy and relevance. Also, two realities of my residency kept me more or less engaged in this sphere of work: one, the fact that I was given increasingly more responsibility for other things, such as researching learning agenda questions and managing Transcend’s independent school pipeline, and two, that Transcend was onboarding so many people in a short period of time.

That said, I have strong sense that a vision for community building is not enough, and that a vision for movement building is just as crucial for Transcend. After all, Transcend’s mission is to spread breakthrough models across the U.S. education sector. For that to happen, the soil of the education field must be tilled so that it is prepared and keen to adopt and adapt breakthrough school models that Transcend builds with its partners. Thus, it seems to me that complementing community building with movement building is a next phase of work for Transcend’s community management and, ideally, a team with increased capacity. Pastor and Ortiz (2009) offer a movement-building lens to consider ways in which Transcend’s vision is taking and has yet to take hold (Figure 12).

**Figure 12.** — Ten key elements for social movement builders and impact on Transcend

<table>
<thead>
<tr>
<th>Elements for social movement builders</th>
<th>Ways this is taking hold for Transcend</th>
<th>Ways this has yet to take hold for Transcend</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A vision and frame</td>
<td>Solid and evolving</td>
<td>Seek feedback, perpetual beta</td>
</tr>
<tr>
<td>2. An authentic base in key constituencies</td>
<td>Solid and evolving</td>
<td>Critical decisions ahead about relating meaningfully to current and prior school partners</td>
</tr>
<tr>
<td>3. A commitment to the long-haul</td>
<td>Expressed in organizational values, staff retention, and partner MOUs</td>
<td>Need for continued expansion</td>
</tr>
<tr>
<td>4. An underlying and viable</td>
<td>Solid and evolving</td>
<td>Need to explore sustainable</td>
</tr>
<tr>
<td>economic model</td>
<td>revenue streams</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>5. A vision of government and governance</td>
<td>Version 1.0 for governance is nearly done; none yet for government</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Need to build version 1.0 vision for government and test and refine version 1.0 for governance</td>
<td></td>
</tr>
<tr>
<td>6. A scaffold of solid research</td>
<td>A nearly complete first phase to share with the field</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Need to complete and build on phase one, as well as finalize a program evaluation approach</td>
<td></td>
</tr>
<tr>
<td>7. A pragmatic policy package</td>
<td>None yet</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Need to build</td>
<td></td>
</tr>
<tr>
<td>8. A reception of the need for scale</td>
<td>A good start with a handful of schools expressing interest in spreading Transcend’s first school model after only its second year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Need to grow the pool of adopters for the first and also other models</td>
<td></td>
</tr>
<tr>
<td>9. A strategy for scaling up</td>
<td>Version 1.0 in the works</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Needs refinement, testing, and implementation</td>
<td></td>
</tr>
<tr>
<td>10. A willingness to network with other movements</td>
<td>A good start with a handful of strategic partnerships</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Need for continued expansion and partnerships, especially with organizations linked closely to emerging education innovations</td>
<td></td>
</tr>
</tbody>
</table>

Source: Pastor & Ortiz, 2009

**Implications for self**

This residency was the first time I worked remotely for more than three months. I discovered there are ten keys for me to work remotely with success:

1. Ensure sufficient quantity and length of check-ins with teammates
2. Prioritize weekly team meetings to stay up to date and to connect relationally with teammates
3. Set weekly measurable goals in alignment with quarterly goals that are approved by my supervisor early in the week, and which ultimately align with the organization’s pace for progress
4. Leverage technology, such as Slack and email, to stay plugged into daily organizational updates

5. Always make my rationale visible to others, so that they can understand the process and weigh in with helpful feedback

6. Always prepare for, and help others prepare for, virtual meetings so the limited meeting time is maximized for efficiency

7. Stay physically active during the day—e.g., push-up and pull-up breaks

8. Eat less—because there is less walking than other jobs

9. Identify recreational activities, especially pickleball,\(^{15}\) to break up the day from time to time

10. Create a buffer time between work and family time to allow my mind to decompress and to prepare myself to be fully present with my family

As I reflect more broadly about the nature of the work itself and what I learned from exercising leadership at Transcend, points number 3 (goals) and 5 (rationale) above are worthy of unpacking.

Regarding the management of my own goals, I used to think that defining success, such as preemptively naming ideal outcomes of a project or initiative, was sufficient to get results for my organization and to align key actors. I can now see that scaffolding the milestones of a project or initiative and sharing them with other teammates have increased benefits. Writing and sharing such project detail, when presented alongside colleagues who may or may not be involved in similar work, allows for everyone in the organization (or on a particular team) to see connections, to weigh in

\(^{15}\) Pickleball is a paddle sport created for all ages and skill levels.
with feedback and ideas, to learn from others’ plans, and to leverage previously unforeseen opportunities that become apparent only when the plans of others are fully revealed.

Making my rationale visible to others, which is similar to the above point about making scaffolded goals explicit to others, is another major takeaway from my residency. I used to think that in the context of work it was important to *always* make my rationale explicit when speaking and to *sometimes* make my rationale explicit when writing. Now, I think that it is important and helpful to *always* make my rationale explicit when speaking *and* writing. Working at a shared location, as I have always done, meant that any gaps in my writing could be assuaged simply by meeting and speaking about them. Working remotely, however, often requires asynchronous communication, meaning that any gaps in my writing delayed the ability of my colleagues to provide robust input. Thus, early on I learned to make my full rationale explicit so as not to slow down progress. I can see now how a similar norm would be helpful even when working in a shared location in that it adds efficiency.

In addition to learning new things associated with working remotely, I also learned more about how others respond to something that I think is critical for the work of school redesign: building a shared vision for movement building. Because we reined in our community-building strategy to emphasize delivering on early promises to stakeholders rather than building a national movement, it is difficult for me to know whether my Transcend teammates were hesitant to take steps towards movement building. That said, there are two main pieces of evidence that lead me to think that they
might be hesitant to build a movement building: their hesitancy to promote Transcend on social media and their reticence to cultivate and track the feelings of stakeholders.

Regarding social media, I see multiple connections between my own social media presence and Transcend’s longer term outcomes. For example, when I promote Transcend on my own social media channels, others can engage with knowledge that Transcend produces and shares, connect to hiring opportunities, become informed and excited about new models, and more. Helping my teammates see these connections might be a critical part of the work moving forward as we ramp up movement building.

Regarding the feelings of stakeholders, numerous teammates let me know in various ways that they did not perceive stakeholders feeling in fellowship with Transcend as a key goal of our community building strategy. Rather, they cited access to ideas and people as primary objectives. As a pastor, my own bias is that people actually will be connected to a mission when not just their will (volition) and thoughts (ideas) are captivated but also their emotions. Based on early feedback from teammates, I foresee a time in the near future at Transcend where collaboratively we might explore to what extent it makes sense for us to engage our stakeholders’ emotions. When that time comes, I can draw on previous experiences as a pastor.

In reflection, aspects of me that helped the work move forward include:

• My direct experience with design, innovation, 21st-century skills, change management and/or “next generation” school models allowed me to quickly assess potential good partners, make the case for collaboration, and craft messages and invitations supporting such collaboration.
• My passion for creating innovative, breakthrough new school models that generate unprecedented results for students endeared me to colleagues internally and resonated with partners externally.

• My demonstrated ability as a pastor, educator, and leader to lead diverse teams to achieve results gave me confidence to inspire bold vision and invite others to engage.

• My ability to think strategically and execute efficiently in a lean environment allowed me to juggle multiple roles at once and help others think strategically.

• My skills like deep instructional experience, user-centered design, and collaboration and teamwork helped me to see opportunities for connections with others (internally and externally) and to mold consensus around 37 promising indicators for community building.

Aspects of me that did not help the work move forward include:

• A tendency to overcommit reduced my time on tasks and led to parts of the community-building work being left undone.

• My avoidance of conflict possibly kept me from challenging teammates to engage with community-building activities in ways I thought they could.

• I have an allegiance to nuance, which led me to design an overly complicated, difficult-to-understand community map.

As a result, I would do the following two things differently if given the same opportunity again:

1. Explore more strategies to lead informally.
2. In addition to co-creating indicators with individuals, give more attention to translating those one-on-one conversations and decisions into shared understanding and processes across the organization.

_implications for sector_

The residency has left me contemplating a question that is similar both to one that I faced when co-founding the Transforming Teaching Project based out of the Harvard Graduate School of Education, and, even before that, to one that I brought into the Harvard Ed.L.D. program when I first applied: _how might we fan the flames of a national movement to update our approach to teaching and learning in an Information Age?_ To that end, my experience at Transcend has left with me with three thoughts.

Firstly, a truly transpartisan intermediary organization is amenable to the broadest set of potential partnerships. Despite a tumultuous political year, including the run-up to and results following the 2016 U.S. elections, Transcend eluded controversy by espousing and elevating compelling core values rather than ideologies. As a result, I saw Transcend remain relevant to private, charter, and district schools in both red and blue states, counties, and neighborhoods. Because I was entrusted with communications during my residency, I am proud that Transcend actually _increased_ its relevance and influence in the field of education R&D. A resultant implication for the education sector is a need to allow core values to prevail over ideals as we collaborate to raise up the next generation of young people. Increasingly, educators are espousing the need for students to learn inclusivity in our multi-cultural country; so, too, should those of us serving and
leading in the sector model that inclusivity by working across ideological aisles in service of youth development.

Secondly, existing curriculum, and teacher perceptions to attend to such curriculum, remain substantial barriers to school design innovation. During this process, I watched multiple potential and real school partners act with the intention of innovating their learning environments, only to be hamstrung by commitments to siloed, discipline-based curriculum that were disconnected from their community’s core beliefs about learning, from their ideal stakeholder experience journeys, and from their espoused graduate aims. Truly, rare is the leader with the courage to start anew. But that is what the world of today demands. With the Every Student Succeeds Act of 2015, educators have been given a gift to reimagine a program of study for this generation of students, an opportunity I hope we can maximize. Specifically, my recommendation for the education sector is that we view curriculum less as way to ensure mandated outcomes, and more as a tool that should be co-created to meet the needs of youth.

Lastly, an opportunity exists for an intermediary organization such as Transcend to play an unfulfilled, catalytic role in the field of education as it relates to education R&D. As described at the beginning of this capstone, there is emerging consensus in the education field, bolstered by recent state and federal policy changes, that “school” should cultivate and measure a broader set of student outcomes—collaboration, critical thinking, creativity, and other social and emotional skills. But as of yet, the education field does not know what interventions reliably and with statistical significance cultivate this new set of desirable student outcomes. And currently no organization exists to share such knowledge with the field.
There is an opportunity for an organization such as Transcend to leverage its growing network of charter, private, and traditional public schools to prove quantitatively the merit of myriad innovative school model components. The first step would be for an intermediary such as Transcend to establish a way for partner schools to track and report the impact of innovative school model components. The second step would be to have school partners agree (via Memoranda of Understanding or the like) to track and centrally report the impact of innovative school-model components. The third step would be for that central agency to examine impact both within schools and across its network of schools to publish reports revealing the impact of emerging innovative school model components. If accomplished at Transcend, the organization’s Build Knowledge team, which is made up of Ph.D.s and other researchers, could lead this work.

I can imagine a way to track and report the impact of innovative school model components through a threefold approach:

1. Ongoing R&D at the grade/classroom level to help school partners run quick tests to make informed, more confident decisions about what school model tweaks should be made

2. Periodic logic model R&D at the school level, allowing the central agency to instantly measure the association (both correlation and causal relation) of the relationships between the various activities/programs/model components of a particular school by uploading inputs, activities/programs/model components, and outputs
3. Yearly cross-network landscape analyses, affording the opportunity to compare innovative model components across different settings and to interrogate the strength of their impact more broadly

Examples of the kinds of key messages that a central agent could use with this approach include:

- The number of years a school has implemented [a particular school-design innovation] is significantly related to students’ math and ELA scores on state-mandated tests, college-admissions rates, college-matriculation rates, and the number of parents reporting their satisfaction with their school.
- Schools adopting [a particular school design innovation] are significantly more likely to report higher student motivation and greater improvement on creativity and critical-thinking indicators.
- Schools that include some component of a real-world, problem-based learning model are significantly more likely to report higher school attendance and higher teacher collaboration.

Examples of the kinds of questions Transcend could answer with this threefold approach include:

- Should all schools try to implement something like [an innovative school-model component]? Put differently, is it worth it for schools to build capacity to implement something like [an innovative school-model component]?
- What kinds of impact can schools expect to see if and when they reliably adopt and adapt certain innovative school model components?
• Innovative school model components have the greatest promise for which of school design teams’ most pressing, unresolved questions in transforming education?

I imagine that such an R&D organization would have multiple ways not only to demonstrate its legitimacy and sustainability to funders, but also to add immeasurable value to the education sector at large.

CONCLUSIONS

In a way, this capstone has taken three steps, beginning with the broad and ending with the narrow. First, I asked what schools will look like when teaching and learning is once and for all “21st century” in the United States, when broader, better student outcomes are both the cause of our collective celebration and the impetus for the design of our learning environments. Second, I referenced a vision for a necessary R&D mechanism—one that produces, vets, disseminates, uses, tests, and refines actionable knowledge—so that, ultimately, we can forsake education’s status quo in favor of that compelling 21st-century vision. And third, I introduced an important new intermediary, Transcend, a nonprofit organization intent on accelerating that sector transformation, and I shared how that intermediary has begun to build community internally and externally in service of that greater vision.

It is difficult to predict the role that Transcend will ultimately play in the history of the education field and, more specifically, in the history of what I believe is an inevitable transformation of schools in an Information Age. To the extent that Transcend’s portfolio of school partners becomes and remains as diverse as possible,
Transcend’s breakthrough school should have great relevance. To the extent that Transcend’s Yellow Hats League grows in number and quality, leaders in the field should have experts at the ready for when they decide to redesign schools. And to the extent that Transcend’s emerging insights service the pain points of its diverse group of school design teams and publish those findings, any school design team anywhere in the world should have the facts they need to make the most informed decisions.

Moving forward, there is an opportunity to consider what role Transcend might play, not only in community building to advance breakthrough school models, but in the greater context of movement building within and across the broader education field. For sure, Transcend is planting breakthrough schools in the fields of its school partners; but what activities might Transcend undertake to till the soil for breakthrough schools to take root in other meadows? When? And for what reasons?

Regardless, the success of Transcend’s current and future approaches will depend in large part on the ability of its breakthrough school models to deliver demonstrably improved results for kids. But because “all great achievements require time,” as Dr. Maya Angelou has been attributed to say, critics and supporters alike would do well to afford Transcend, its partners, and the many other bold early adopters like them the grace to play the long-game and, true to the scientific method, work things out.


Lundgren, M., von Schantz Lundgren, I., & Kihlstrand, A. M. (2013). School leaders as agents of change: a case study on how two head teachers are trying to implement the learning study method in their school. In European Network for Improving Research and Development in Education Leadership and Management, ENIRDELM, Antalya, Turkey, September 27-29 2012. (pp. 15-30). Akdeniz University, Faculty of Education.


### APPENDIX A: TRANSCEND STAKEHOLDER GROUPS/TEAMS & PURPOSES

<table>
<thead>
<tr>
<th>GROUP/TEAM NAME</th>
<th>GROUP/TEAM PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Builders</td>
<td>To recruit, hire, develop, and sustain all R&amp;D Talent</td>
</tr>
<tr>
<td>Partners</td>
<td>To faithfully advance the Transcend mission</td>
</tr>
<tr>
<td>Project Leads</td>
<td>To provide expert assistance to school operators on projects</td>
</tr>
<tr>
<td>Project Managers</td>
<td>To develop goals, objectives, and deliverables for project workstreams</td>
</tr>
<tr>
<td>Project Talent</td>
<td>To work on projects to build and spread breakthrough school models</td>
</tr>
<tr>
<td>On Deck Talent</td>
<td>To prepare, and to remain prepared, for breakthrough school projects</td>
</tr>
<tr>
<td>Domain Managers – a.k.a. Org Builders</td>
<td>To lead workstreams that advance various aspects of Transcend’s mission</td>
</tr>
<tr>
<td>Community Advisers</td>
<td>To build trust and community among Yellow Hats members</td>
</tr>
<tr>
<td>Knowledge Builders</td>
<td>To build and advance Transcend’s learning agenda and insights, and to recruit researchers and practitioners to provide feedback and guidance</td>
</tr>
<tr>
<td>Insight Advisors</td>
<td>To provide independent, expert, research- and practitioner-based advice on Transcend’s insights</td>
</tr>
<tr>
<td>Scientific Advisory Board</td>
<td>To provide independent, expert advice and regular strategic guidance on Transcend’s learning agenda and insights</td>
</tr>
<tr>
<td>Pipeline Builders</td>
<td>To forge partnerships with school operators to build, codify, and spread breakthrough school models</td>
</tr>
<tr>
<td>School Partners</td>
<td>To partner with Transcend in building, codifying, and spreading breakthrough school models</td>
</tr>
<tr>
<td>Project Teams</td>
<td>To collaborate with Transcend school partners to build, codify, and spread breakthrough school models</td>
</tr>
<tr>
<td>Collaborative Partners</td>
<td>To partner with Transcend and NSVF to build plans for breakthrough school models that involve key stakeholders and foster community enthusiasm</td>
</tr>
<tr>
<td>Network Partners</td>
<td>To develop goals, objectives, and deliverables for project workstreams</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Early Adopters</td>
<td>To partner with Transcend to adopt and adapt breakthrough school models</td>
</tr>
<tr>
<td>Board</td>
<td>To provide oversight and management of Transcend in conjunction with the top executive(s)</td>
</tr>
<tr>
<td>Funders</td>
<td>To fund the Transcend mission</td>
</tr>
<tr>
<td>Advisory Council</td>
<td>To voluntarily advise Transcend so as to help advance Transcend’s mission and breakthrough models</td>
</tr>
<tr>
<td>Transcender Network</td>
<td>To follow and promote Transcend’s activities via social media, newsletter, blog, etc., and to contribute to Transcend’s learning agenda and insights</td>
</tr>
<tr>
<td>Allies</td>
<td>To exchange resources with Transcend that advance Transcend’s learning agenda, insights, talent, network, or school projects in some formalized, longer-term way</td>
</tr>
<tr>
<td>Champions</td>
<td>To exchange resources with Transcend that advance Transcend’s learning agenda, insights, talent, network, or school projects in some informal way</td>
</tr>
<tr>
<td>Influencers</td>
<td>To voluntarily and publicly support Transcend on an event-based basis</td>
</tr>
</tbody>
</table>
# APPENDIX B: DRIVER DIAGRAM FOR THE TRANSCENDER NETWORK

<table>
<thead>
<tr>
<th>Main outcomes for Transcend</th>
<th>Transcender Network drivers of desired outcomes</th>
<th>Secondary drivers—i.e., activities Transcend undertakes with the Transcender Network</th>
<th>Strategic bets / Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Build <strong>breakthrough models</strong> that scale to multiple schools</td>
<td>1.1—Attract visionary school leaders from public, private, and charter schools interested in partnering with Transcend either to design and/or launch new school models or to improve and spread their existing innovative school models</td>
<td>1.1.1—Announce future partnership and cohort opportunities</td>
<td>IF we publicize Transcend’s partner and cohort opportunities, THEN we will attract the most mission-aligned, diverse pool of candidates from across public, private, and charter schools BECAUSE while our collective networks are more capable than our individual networks of connecting with prospective visionary school leaders from all sectors, they are not capable of attracting a sufficiently diverse group of public, charter, and private school leaders.</td>
</tr>
<tr>
<td></td>
<td>1.1.2—Publicly celebrate the wins and opportunities from our partnerships, cohorts, students, and families so that others see and want (their school) to be a part of it</td>
<td>1.1.2—Publicly celebrate the wins and opportunities from our vetted community, THEN we will increase excitement and interest in Transcend’s school models, talent force, insights, and partnerships BECAUSE an organization cultivates and replicates whatever it celebrates.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.1.3—Share evidence for how others are overcoming the challenges and barriers to making the transition to the 8 great leaps</td>
<td>1.1.3—Share evidence for how others are overcoming the challenges and barriers to making the transition to the 8 great leaps, THEN we will persuade more mission-aligned visionary school leaders to use our R&amp;D engine BECAUSE sharing evidence will increase our legitimacy and confidence in our vision.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.1.4—Search for, ask about, and target promising school design team candidates and invite them to apply</td>
<td>1.1.4—Search for, ask about, and target promising school design team candidates and invite them to apply</td>
<td>IF we ask to be connected with or search for high performing, mission-aligned, visionary school operators that are outside our Transcender Network, THEN we will attract the most mission-aligned, diverse pool of candidates from across public, private, and charter schools BECAUSE our broader network is more capable of connecting us with a sufficiently diverse group of high performing public, charter, and private school leaders.</td>
</tr>
</tbody>
</table>
|                            | 1.1.5—Virtual and in-person opportunities to collaborate with other members of the community | 1.1.5—Virtual and in-person opportunities to collaborate with other members of the community | IF we host virtual conversations on social media (e.g., webinars) about complex, cutting edge questions that forward thinking school design teams are asking, THEN we will persuade more mission-aligned visionary school leaders to engage and partner with us BECAUSE hosting useful
| 1.2—Grow the pool of early adopters interested in spreading our new, co-created school models | 1.2.1—Publicly empathize with individuals who long for new school models | If we empathize with individuals who make known their desire for new school models, THEN our network will be more willing to share our insights and/or spread our models BECAUSE being heard is so close to being loved. |
| 1.2.2—Generate and publicize usable knowledge for school design team members (i.e., the public components of our learning hub and sharing shelf) | IF we share knowledge that school design teams can use, THEN demand for our services will increase BECAUSE high quality services that save people time cultivate return users and cause people to recommend services to others. |
| 1.2.3—Publicly celebrate the wins associated with our breakthrough school design models, so that others see and want (their school) to embrace these models | IF Transcend team members and “Transcend the org” publicly celebrate the wins from the breakthrough models that are being spread in the field, THEN we will increase the amount of school design teams that want to replicate the innovative models BECAUSE an organization cultivates and replicates whatever it celebrates. |

| 2. Build a robust, diverse force for the field, of school model R&D practitioners (they will build, codify, and spread models) | 2.1—Attract applicants interested in joining Transcend’s Talent Team and/or staff | 2.1.1—Announce Talent Team and Transcend staff opportunities | IF we share job and volunteer opportunities broadly, THEN we will attract the most mission-aligned, diverse pool of candidates from across public, private, and charter schools BECAUSE while our collective networks are more capable than our individual networks of connecting with prospective visionary school leaders from all sectors, they are not capable of attracting a sufficiently diverse group of public, charter, and private school leaders. |
| 2.1.2—Generate or promote content that aligns with Transcend’s core values | TBD |
| 2.1.3—Publicly celebrate wins associated with our world-class, diverse R&D talent team and staff (e.g., awards, mentions, publications, etc.) | TBD |
| 2.1.4—Systematically listen to what others are saying about our brand and address public complaints | TBD |
| 2.1.5—Announcing partnership opportunities | TBD |

<p>| 3. Build and share a knowledge base of critical, | 3.1—Encountering information that advances our learning agenda and | 3.1.1—Listen to what others are saying about ideas, resources, tools, and | TBD |
| 3.1.2—Generate or promote content that aligns with Transcend’s core values | TBD |
| 3.1.3—Publicly celebrate wins associated with our world-class, diverse R&amp;D talent team and staff (e.g., awards, mentions, publications, etc.) | TBD |
| 3.1.4—Systematically listen to what others are saying about our brand and address public complaints | TBD |
| 3.1.5—Announcing partnership opportunities | TBD |</p>
<table>
<thead>
<tr>
<th>actionable insights</th>
<th>insights (as measured by our partners' attitudes and perceptions)</th>
<th>exemplars related to our learning agenda and insights, and systematically relay answers to Transcend’s Knowledge Builders</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1.2 — Pose questions related to our learning agenda and insights, and systematically relay answers to Transcend’s Knowledge Builders</td>
<td>IF we invite the Transcender Network to give feedback on our learning agenda and insights, THEN we will improve the usability and effectiveness of our learning agenda and insights BECAUSE while our scientific advisory board, user testers, and knowledge builders do an excellent job at building and refining insights, their capacity and perspective are limited and thus can be enhanced by an even broader and more diverse set of eyes.</td>
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</tr>
<tr>
<td>3.1.3 — Create channels to invite diverse stakeholder groups, including parents and students, to give feedback on the public aspects of our learning agenda and insights</td>
<td>TBD</td>
<td></td>
</tr>
<tr>
<td>3.2 — Building an audience and the vehicles to communicate with that audience to share actionable insights</td>
<td>3.2.1 — Create the avenues and vehicles for communication and ongoing engagement</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td>3.2.2 — Develop knowledge and opportunity sharing agreements with like-minded organizations to increase our audience and find additional relevant information that advances our learning agenda</td>
<td>TBD</td>
</tr>
<tr>
<td>4. Build Transcend as a thriving R&amp;D organization</td>
<td>4.1 — Building and sustaining a reputation as being on the vanguard of next generation school models (as measured by comparative data from online reputation metrics)</td>
<td>4.1.1 — Clearly and regularly communicate Transcend’s unique mission and promise—to build an R&amp;D engine that supports the design, launch, and spread new school models where every student develops intellectually to high levels and the performance gap related to race, class, and gender narrows until school effects are no longer correlated with those factors</td>
</tr>
<tr>
<td></td>
<td>4.1.2 — Share demonstrations of Transcend’s expertise</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td>4.1.3 — Share examples of innovative school models across the country and the</td>
<td>TBD</td>
</tr>
<tr>
<td>4.2—Building and sustaining a reputation as being a champion of equity and practitioner of inclusivity, cultural sensitivity, and diversity awareness (as measured by our stakeholders’ attitudes and perceptions—e.g., stakeholders including staff, funders, partners, etc.)</td>
<td>4.2.1—Publicly empathize with individuals who suffer from uncomfortable, unequal, ineffective, or prejudicial conditions and relationships in schools</td>
<td>TBD</td>
</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td>4.2.2—Generate or promote content characterized by honesty, respect, continuous learning, collaboration, shared decision making, and wide involvements of people (see Discourse II &amp; survey results below)</td>
<td>4.2.2—Generate or promote content characterized by honesty, respect, continuous learning, collaboration, shared decision making, and wide involvements of people (see Discourse II &amp; survey results below)</td>
<td>TBD</td>
</tr>
<tr>
<td>4.2.3—Share aspects of Transcend’s own learning, of how we are improving and innovating beyond the familiar</td>
<td>4.2.3—Share aspects of Transcend’s own learning, of how we are improving and innovating beyond the familiar</td>
<td>TBD</td>
</tr>
<tr>
<td>4.2.4—Engage across sectors—public, private, and charter schools—and stakeholders—funders, partners, employees, advisors, regulators, politicians, NGOs, foundations, for profits, and the communities where Transcend partner schools are served</td>
<td>4.2.4—Engage across sectors—public, private, and charter schools—and stakeholders—funders, partners, employees, advisors, regulators, politicians, NGOs, foundations, for profits, and the communities where Transcend partner schools are served</td>
<td>TBD</td>
</tr>
</tbody>
</table>
## APPENDIX C: BUILDING A COMMUNITY OF BREAKTHROUGH SCHOOL DESIGNERS FOR THE EDUCATION FIELD

<table>
<thead>
<tr>
<th>Stakeholder groups*</th>
<th>Inputs</th>
<th>Activities</th>
<th>Outputs</th>
<th>Longer term outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder groups*</td>
<td>- Emphasis on human resources - e.g., time and talent. Budgetary resources differ per category &amp;/or are TBD.</td>
<td>- Activities that contribute to community building</td>
<td>- What to measure along the way to get to our longer term outcomes</td>
<td>- More people in pursuit of breakthrough school design</td>
</tr>
</tbody>
</table>
| Yellow Hats R&D Talent who staff school partner projects and who build and sustain the Transcend org | - Lavada & Sarah -.1 Talent Associate -.5 | - In-person convenings / retreats  
- Onboarding Buddies  
- Weekly calls / huddles w Project Mgrs/Leads*  
- Professional dev offerings  
- Open calls  
- Social media collaboration - e.g., Slack  
- Community advisers  
- Newsletter | By end of December 2017:  
- 90% of Yellow Hats find onboarding and professional development helpful  
- At least 25% of Yellow Hats share learnings / experiences / resources / opportunities with the YHL  
- At least 60% of Yellow Hats refer someone else to join within their first year  
- 20% of our new project talent comes from Yellow Hats | - An improved network of people and organizations dedicated to breakthrough school design |
| Funders Orgs or individuals who fund the Transcend mission | - Emily - estimated .25 FTE | - Quarterly update memos  
- V-Day cards  
- Group calls  
- Event invites  
- Send them articles  
- Thank you cards  

[Click here for an exemplary community building calendar](#) | Loyalty  
- Funding commitment fulfillment - 95% of funders honor pledges, at any point in time  
- 70% of individuals giving $1,000+ re-up their gift at least once at or above the level they gave before  
- 51% of foundations re-up grants  

Positive Word of Mouth  
- 20% of foundations give us connections that yield $100,000+ grant annually  
- 100% of foundations mention us in a website or newsletter annually  
- From among our funders, 3 substantive pieces that promote us positively | - Increased number of raving fans of Transcend’s community  
- Draws more people into the network  
- Increased likelihood people will activate in ways we want, such as knowledge building, partnerships, funding, etc. |
| | | | Intermediate- term outcomes: |
| | | | - Increased number of raving fans of Transcend’s community  
- Draws more people into the network  
- Increased likelihood people will activate in ways we want, such as knowledge building, partnerships, funding, etc. |
| | | | Short-term outcomes: |
| | | | - Every person in Transcend’s network is and feels in fellowship as we collectively pursue breakthrough school design |
| **Collaborative**  
*Partner with Transcend and NSVF to build plans for breakthrough school models that involve key stakeholders and foster community enthusiasm* | Thaly Germain - estimated .25 FTE | Whole Group (e.g. convenings, virtual messages, slack)  
Small Group (e.g. convenings, virtual messages, slack, executive coaching)  
Individually (e.g. convenings, virtual messages, slack, text, phone) | • 60-70% of participants reporting feeling connected to the Transcend/Collaborative community;  
• 80-90% of participants report that they have borrowed practices and/or resources from the community;  
• 85-90% of participants attended 80% or more of expected events;  
• 90% of participants read virtual communications;  
• 30% of participants respond to communications by accessing links or responding directly to emails; and  
• 30% increase in use of slack and other communication tools.  
• Net Promoter Score of 75+ after each convening |
|---|---|---|---|
| **School Operators**  
*Specific school leaders who partner with Transcend in building, codifying, and spreading breakthrough school models* | Transcend Project Leads/Managers | • Regular meetings cadence and phone calls — full team, subteams  
• Partnership launch / kickoffs  
• 2x2s / stepbacks  
• Team Surveys: Given regularly (i.e., every cycle) to evaluate “health” of team; not standard across teams, but worth considering having a “default” in future  
• Site visits, critical friend visits  
• Checking in on personal level  
• Appreciation: shout outs, gifts, etc. | At least 80% of team members return to team for additional phases/years (if applicable)  
At least 80% of team members respond favorable to key indicators of satisfaction, support, positivity on team surveys  
100% of partners “re-up” with Transcend for additional phases/years of the partnership (if applicable)  
Annual survey to leaders (or full team) show net promoter score of 75+ and provide website worthy testimonials |
| **Scientific Advisory Board**  
*Researchers who provide independent, expert advice* | Charlot - estimated .2 FTE | Organize and lead annual or bi-annual calls for the SAB  
Manage ongoing 1:1 communication around insights w/ each SAB members (tracking the | 100% SAB renewal of service by Dec 2017  
Addition of 2 new SAB members by Dec 2017  
100% of SAB members give |
**and regular strategic guidance on Transcend’s learning agenda and insights**

<table>
<thead>
<tr>
<th>Impact of their input on insights</th>
<th>Manage periodic email updates to SAB members</th>
<th>at least 1 piece of feedback per ask</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Promoter Score of 75+ by June 2017. See example on slide 5</td>
<td>100% stay subscribed to newsletter post-SAB service</td>
<td></td>
</tr>
</tbody>
</table>

**Insight Advisors**
Professionals who provide independent, expert, research- and practitioner-based advice on Transcend’s insights

<table>
<thead>
<tr>
<th>Charlot - estimated .1 FTE</th>
<th>Manage ongoing 1:1 communication around insights w/ each knowledge builder (tracking the impact of their input on insights)</th>
<th>Willingness to share and stay in touch - e.g., 9 out of 10 times folks reply to email asks for feedback</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Manage periodic email updates</td>
<td>By 12/17, make 2+ connections per advisor btwn advisor contributions and student impact in partner schools</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Track impact on school design through our partners.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Annual survey responses - Net Promoter Score of 75+ by June 2017. See example on slide 5</td>
</tr>
</tbody>
</table>

**Transcender Network**
Forward-thinkers who are not directly connected to Transcend but who aid and follow Transcend activities

<table>
<thead>
<tr>
<th>Tyler - estimated .25 FTE</th>
<th>Via our channels/vehicles for communication…</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>* Share evidence for how others are overcoming the barriers to making the 8 Great Leaps</td>
</tr>
<tr>
<td></td>
<td>* Celebrate the wins from our talent and partners</td>
</tr>
<tr>
<td></td>
<td>* Announce Talent opportunities</td>
</tr>
<tr>
<td></td>
<td>* Crowdsource feedback on our insights</td>
</tr>
<tr>
<td></td>
<td>750+ Twitter by 3/31/17</td>
</tr>
<tr>
<td></td>
<td>580+ FB likes by 3/31/17</td>
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<tr>
<td></td>
<td>300+ Linkedin by 3/31/17</td>
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<tr>
<td></td>
<td>1,600+ Newsletter by 3/31/17</td>
</tr>
<tr>
<td></td>
<td>50+ Klout score by 3/31/17</td>
</tr>
<tr>
<td></td>
<td>300+ Downloads per insight 3 months after launch</td>
</tr>
</tbody>
</table>

*TBD Feedback on insights

*Note: For brevity, some stakeholder groups are not included above, e.g., governing board, partners, “influencers,” “allies,” and others.*
APPENDIX D: SCHOOL PARTNER DIVERSITY RELATED TO THEIR AMBITION TO MAKE THE EIGHT GREAT LEAPS

From the perspective of Project Leads

Mapping Transcend's Tier 1 Partners with the 8 Great Leaps

Interdisciplinary
Embedded Tech
High expectations
Diversity
Self-directed learning
Active parents
Flexible learning spaces
Educators collaborating

Value
nXs
MFA
AF
## APPENDIX E: SCHOOL PARTNER DIVERSITY RELATED TO SECTOR

<table>
<thead>
<tr>
<th>Partnerships by sector</th>
<th>n</th>
<th>%</th>
<th>Sacrificial(!) Long term goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional public</td>
<td>3</td>
<td>21%</td>
<td>40%</td>
</tr>
<tr>
<td>Charter</td>
<td>10</td>
<td>72%</td>
<td>40%</td>
</tr>
<tr>
<td>Private</td>
<td>1</td>
<td>7%</td>
<td>20%</td>
</tr>
<tr>
<td>Total</td>
<td>14</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>