Academic Strategy in Action: Instructional Focus and Coherence in Chicago Public Schools

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Accessibility
Academic Strategy in Action: 
Instructional Focus and Coherence in Chicago Public Schools

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

Submitted by
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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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“To create urban schools which really teach students, which reflect the pluralism of society, which serve the quest for social justice - this is a task which will take persistent imagination, wisdom, and will.”

Dedication

To Mom and Dad.
Thank you.
Acknowledgments

To Marty West, for your steady guidance and insight.

To Jen Cheatham, for your wisdom and encouragement.

To Sherly Chavarria, for your brilliance and transparency.

To my colleagues at Chicago Public Schools, especially the leadership team in the Office of Teaching and Learning, for allowing me to learn and work alongside you.

To my former colleagues at DC Public Schools, especially Kaya Henderson, for believing in me and for modeling authentic leadership.

To my fellow cohort nine colleagues in the Ed.L.D. program, for creating a marvelous container for learning and growth.

To my many wonderful teachers from elementary school through graduate school, for inspiring me to strive for excellence.

To my friends and family, especially my mom and dad, my brothers, and Brenton, for your love, support, and laughter.

To my former students, for teaching me so very much.
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Abstract

School systems can be terribly fragmented and incoherent organizations. A lack of clear and focused priorities often results in poor execution of initiatives as well as duplicative, conflicting, non-coordinated, or non-complementary efforts. Moreover, a lack of shared priorities can be felt by school leaders and teachers as an inconsistent and overwhelming number of directives.

During my 10-month residency at Chicago Public Schools, I led the strategic planning and continuous improvement process for the district’s Office of Teaching and Learning. I supported central office collaboration to define, socialize, measure, and monitor an equity-focused, district-wide instructional vision and an associated set of academic priorities. Most notably, I helped the office shift from previous years’ practice of drafting and executing over a dozen separate department plans to creating and collaborating around a singular, collective, officewide academic strategic plan.

This capstone describes and analyzes my efforts to help craft a set of academic priorities, to lead for coherence, and to foster a collaborative culture of inquiry within a district’s academic office. The implications I draw from this work may be helpful to educational leaders, particularly district academic leads, who seek to organize and guide central office staff to develop academic programming, offer professional learning opportunities, and improve student outcomes.
Introduction

“What have you done today to help Makayla learn to read?” Written in dry erase marker, I inscribed this question on the upper-right corner of my office whiteboard where it remained for the six years that I served as the Chief of Teaching and Learning at the District of Columbia Public Schools (DCPS). Occasionally, based on students I met during my weekly classroom visits, the name or content area would change. But the question remained. It was a constant reminder to always be thinking about how my work and the work of the 150 educators in the Office of Teaching and Learning connected to the daily efforts of over 5,000 classroom teachers and nearly 50,000 students.

I am proud of my leadership at DCPS, and when it came time to select a residency site for my doctoral program, I chose to embed myself within another urban school system, the Chicago Public Schools (CPS). I was eager to apply my prior experience and Ed.L.D. learnings to a new context. Chicago’s school district is six times larger—in terms of students, schools, and budget—than the one in our nation’s capital. While the larger scale presented new complexity, I knew many of the issues in Chicago would be similar to those in the District of Columbia. I was excited to continue to grapple with how an urban school system can best ensure that all students attain an excellent education that validates and affirms one’s identity and allows for choosing one’s life path.

Chicago Public Schools

Chicago Public Schools (CPS), the nation’s third largest school system, serves over 355,000 students across 642 schools. In many ways, the recent history of CPS is one of turnaround and improvement. In 1987, then-U.S. Secretary of Education William Bennett called Chicago’s schools “the worst in the nation.” Following a series of
initiatives launched in the early 1990s, the district received nationwide attention for its significant progress on national, state, and local assessments. In 2017, Stanford’s Sean F. Reardon, who studied district improvement across the country, concluded that “CPS students are learning and growing faster than 96% of students in the United States” (Reardon & Hiznze-Pifer, 2017, p. 4). While progress has been made by educators, students, and families of the Windy City, much work remains to ensure that every student, in every school and every classroom, attains an excellent education. Moreover, this year’s remote learning due to the global pandemic posed an unprecedented challenge for families, students, and educators alike.

**Success Starts Here**

In 2019, Chicago Public Schools released its current 5-year Vision *Success Starts Here*. The district’s mission is “to provide a high-quality public education for every child, in every neighborhood, that prepares each for success in college, career, and life.” To guide its work, the district identified three key commitments: academic progress, financial stability, and integrity. Additionally, Chicago Public Schools adopted six core values: student-centered, whole child, equity, academic excellence, community partnership, and continuous learning.

Chief Executive Officer Janice Jackson has led the district since January 2018. Dr. Jackson previously served as Chief Education Officer, a CPS network chief (principal supervisor), a CPS principal, and a CPS teacher. The CEO is appointed by and reports to Chicago’s mayor, Lori Lightfoot. Chicago also has an appointed board of education that is responsible for organizational and financial oversight of the district. The CEO is
supported by a district leadership team, including Chief Education Officer LaTanya McDade, and 17 network chiefs. The district’s annual budget is $6.1 billion.

CPS’s Office of Teaching and Learning (T&L) “supports and provides all stakeholders with educational resources that result in high-quality, culturally-responsive curriculum and instruction that engages and empowers students.” T&L is led by Chief Sherly Chavarria, who was appointed to the role in January 2020 after previously serving as a deputy chief, principal, and teacher in the district. The Office’s FY2021 budget is $72.6 million with 152 full-time employees. Additionally, there are 50 instructional learning specialists in the Office of Network Support who work to improve teaching and learning through a network support structure.

In 2016, Chicago Public Schools launched a Performance Management Initiative for its academic offices and associated departments. Partnering with Dr. Shelby Cosner from the University of Illinois at Chicago, central office staff engaged in a series of professional learning opportunities focused on strategic planning cycles. In April 2018, to better reflect a focus on learning and improvement science, Performance Management shifted in name and practice to Continuous Improvement (CI), a system for promoting convergence, responsive services to schools, and a focus on learning to improve. The district began using language from Waibel et al. (2009) that identified the endpoint of the collaboration continuum as convergence, “a state in which collaboration around a specific function or idea has become so extensive, engrained and assumed that it is no longer recognized by others as a collaborative undertaking” (p. 18). When Success Starts Here was developed in 2019, CI became a lever for the collaboration needed to reach the district’s new goals in the areas of academic progress, financial stability, and integrity.
By supporting an annual strategic planning process, CI serves as “a vehicle to support the district towards achievement of the 5-year vision through careful planning, continuous learning, refinement, and convergence,” according to district documents.

**Figure 1: The Collaboration Continuum**


**Problem of Practice**

Prior to the 2020-2021 school year, each department (literacy, mathematics, arts, personalized learning, etc.) in the Office of Teaching and Learning developed its own annual continuous improvement plan in which staff articulated their department-level priorities, theories of actions, and levers for change. When aggregated to the office-level, several dozen initiatives were listed as priorities with little coordination or strategy. During the first month of residency, I interviewed fourteen director-level staff in the Office of Teaching and Learning. When I asked about areas for improvement, twelve of these directors mentioned their concern about the siloed nature of each department in the
They explained how, in the past, the lack of focused, clear, and coherent instructional priorities manifested itself negatively throughout the district in several ways:

- T&L staff were unable to execute well the large number of priorities due to limited resources (time, people, money, technology).
- T&L staff along with staff in other offices, networks, and schools often engaged in duplicative, conflicting, non-coordinated, or non-complementary efforts.
- T&L staff had difficulty managing up and out to provide meaningful updates and accountability for their work.
- T&L staff were unable to strategically leverage and direct external resources and partnerships.

Moreover, based on feedback from school staff, directors were concerned that the lack of shared instructional priorities was often felt by school leaders and teachers as an overwhelming number of incoherent and inconsistent messages, guidance statements, and compliance requirements.

**Strategic Project**

My strategic project sought to use the district’s strategic planning processes to organize resources and actions around clear and coherent instructional priorities. To move this work forward, I focused on structures, processes, policies, and practices as well as on relationships, information sharing, and staff members’ identities as educators (Safir, 2017).

Over the course of my 10-month residency, I led the strategic planning and continuous improvement (CI) process for Chicago Public School’s Office of Teaching
and Learning (T&L) and supported central office convergence work to define, socialize, measure, and monitor an equity-focused, district-wide instructional vision and associated set of academic priorities. Most notably, I helped the office shift from previous years’ practice of drafting and executing over a dozen individual department plans to collaborating around a singular, collective officewide strategic plan.

In doing so, I collaborated closely with the CEO’s CI team, the Chief of Teaching and Learning, and the teaching and learning leadership team to engage central office and network support staff in collective learning to build coherence, “a shared depth of understanding about the purpose and nature of the work” of teaching and learning (Fullan and Quinn, 2016, p. 1). As Fullan and Quinn (2016) argue, coherence must be built through “purposeful action and interaction, working on capacity, clarity, precision of practice, transparency, monitoring of progress, and continuous correction” (p. 2). By pairing a new officewide strategic plan with an ongoing continuous improvement process, I hoped to help the district make meaningful, sustained progress towards its goals. The major work streams for the strategic project included:

- Collaborating with the CEO’s office to facilitate the SY20-21 Continuous Improvement (CI) Process for T&L as it shifted from drafting and executing stand-alone department plans to sharing a singular, collective T&L officewide strategic plan.
- Collaborating with the chief of T&L to increase internal coherence within the Office of Teaching and Learning around the newly articulated instructional vision, instructional core, instructional priorities, and officewide strategic plan.
• Collaborating with the T&L leadership teams to engage staff across the Central Office and Networks in professional learning that fosters a shared understanding of the district’s instructional priorities.

To build shared understanding of, alignment with, and coherence around shared instructional priorities, I was responsible for the drafting and implementation of the SY2020-21 T&L CI Plan, including the cultivation of cross-department collaboration, project management systems, and progress monitoring processes.

This capstone describes and analyzes my efforts to help craft a set of academic priorities, lead for coherence, and foster a collaborative culture of inquiry within a district’s academic office. This description, analysis, and the subsequent implications may be helpful to educational leaders, particularly district academic leads, who seek to organize and guide central office staff to develop academic programming, offer professional learning, and improve student outcomes.
Review of Knowledge for Action (RKA)

This Review of Knowledge for Action (RKA) explores research and practice related to answering the following question: *How might a district’s central academic office organize and function to better support school improvement, high-quality teaching and learning, and positive academic outcomes for all students?* This question is broader than my project’s focus on strategic prioritization, coherence, and continuous improvement processes, but I wanted to better understand the wider research around the role that a district’s academic office could play in improving student outcomes. The RKA is organized around four topics that have helped guide my thinking and my work over the course of the year:

1) Focus and Coherence
2) The Central Office’s Role in Instructional Improvement
3) Continuous Improvement Processes
4) Adaptive Change, Teaming, and Organizational Culture

Focus and Coherence

My strategic project was deeply informed by literature and practice on the topic of coherence. In a system as large and complex as Chicago Public Schools, coherence is critical to success by ensuring people agree on the type and nature of the work needed to achieve strategic goals, by dedicating the necessary resources to support that work, and by creating systems and structures to facilitate it (Johnson et al., 2015). In their book on the topic, Fullan and Quinn (2016) assert that “coherence consists of the shared depth of understanding about the purpose and nature of the work” (p. 1). They argue that
coherence is a result of purposeful action, interaction, capacity building, clarity, precision of language, transparency, progress monitoring, and continuous reflection. These actions require “the right mixture of pressure and support” (p. 2.). Finally, Fullan and Quinn offer a helpful four-part coherence framework with the following components:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focusing Direction</td>
<td>Clarify and communicate uplifting goals during initial and continuous engagements.</td>
</tr>
<tr>
<td>Cultivating Collaborative Culture</td>
<td>Cultivate the expertise of everyone; focus on collective purpose.</td>
</tr>
<tr>
<td>Securing Accountability</td>
<td>Develop conditions that maximize internal accountability. Complement with external accountability.</td>
</tr>
<tr>
<td>Deepening Learning</td>
<td>Ensure knowledge and capacity building opportunities for all staff.</td>
</tr>
</tbody>
</table>


The Harvard Public Education Leadership Project (PELP) Coherence Framework (Figure 2) was another helpful tool for my thinking and execution of the strategic project. Centered on the instructional core—the interaction between teachers and students in the presence of content—the PELP Framework and accompanying note provided guidance and critical questions on how to align strategy with a theory of change and then to ensure resources, systems, structures, stakeholders, and culture are similarly aligned (Childress et al., 2011). The framework also reminded me to consider the external environment,
such as politics, regulations, contracts, and funding, throughout the project’s development and implementation.

Figure 2: PELP Coherence Framework

Focus is a close cousin to coherence. Ann Clark, former superintendent and chief academic officer of Charlotte-Mecklenburg, once shared with me Geller and Papasan’s (2012) *The One Thing: The Surprisingly Simple Truth Behind Extraordinary Results*. Based on research and their leadership experiences, the authors argue that focus and prioritization are the secrets to breakthrough success. My own experience as chief of teaching and learning at DC Public Schools taught me that individuals in a system can only hold so much change in their head at a given time. As such, as I advanced my CPS strategic project, I drew from Geller and Papasan’s case studies and examples to illustrate how focus and prioritizing can unleash both innovation and excellence.

Finally, I drew lessons from two books that translated theory into practice. The first, *Achieving Coherence in District Improvement* by Johnson, Marietta, Higgins, Mapp, and Grossman (2015), studies five large urban districts that have shown improvement in student achievement. The authors argue that there is no “one best way” to structure the
central office-schools support relationship, but what does matter is whether district leaders effectively align resources, systems, stakeholders, and culture to create a coherent approach to district improvement. Their analysis of Aldine, Baltimore, Charlotte-Mecklenburg, Long Beach, and Montgomery County and the accompanying “lessons for practice” provided concrete ideas, strategies, and action steps to help advance my strategic project (Johnson, et al., 2015). Second, Forman, Stosich, and Bocala’s (2017) *The Internal Coherence Framework: Creating Conditions for Continuous Improvement for Schools* was helpful in illustrating the link between leadership practices, organizational processes, efficacy beliefs, and student achievement. Their reminder that “continuous improvement requires an ongoing commitment to building coherence in an often changing and incoherent environment” was especially helpful given the rapidly evolving circumstances presented by Covid-19 (Forman et al., 2017, p. 13). Further, their work constantly reminds the reader what coherence should *feel like* at the school level, encouraging thoughtful consideration about the link between school-based coherence and the direction and support offered by a central office.

**Central Office’s Role in Instructional Improvement**

The second body of literature that informed my strategic project centered on the role of a district’s central office, particularly its academic office, in advancing instructional improvement at scale. City, Elmore, Fiarman, and Teitel’s (2009) book *Instructional Rounds in Education: A Network Approach to Improving Teaching and Learning* was influential, especially their chapters on the instructional core and theories of action. The authors remind readers that “in most school systems, initiatives sprout like kudzu” and that “the job of a good theory of action is to find a clear path through this
initiative thicket” (City et al., 2009, p. 44). The if...then propositions of a theory of action along with the authors’ framework and methods for drafting meaningful theory of action statements provided a path forward.

Two practical guides in this area were Curtis and City’s (2009) *Strategy in Action: How School Systems Can Support Powerful Learning and Teaching* and West Ed’s *Central Office Inquiry: Assessing Organization, Roles, and Actions to Support School Improvement* (Agullard & Goughnour, 2006). Both resources explore how central offices can better organize to support the complex and crucial work of improving classroom instruction. The authors ask central office leadership and staff to 1) ensure a deep understanding of the work with a vision for what excellence looks like, 2) craft a theory of action for improving instruction with a focus on key strategies and aligned resources, and 3) build organizational systems, structures, and habits of mind that foster continuous improvement. Both books also provide self-assessment tools and structured activities to build capacity in these areas.

Finally, I used resources, framework, recommendations, and tools from Honig’s work on central office transformation for district-wide teaching and learning improvement via the Center for the Study of Teaching and Policy at the University of Washington. One 2010 study commissioned by the Wallace Foundation found that “central offices are not simply part of the background noise in school reform. District-wide improvements in teaching won’t happen without leadership from central office staff members working in partnership with schools” (Honig et al., 2010, p. iii). The report examines three districts—Atlanta, New York City, and Oakland, Calif.—that attribute student achievement gains in part to transforming the work of their central office.
employees from a focus on basic services and compliance to improving classroom instruction. Honig’s work is rich with resources for managing this shift and for thinking deeply about the role of the central office in school improvement efforts. For example, I used her central office self-assessment tools to help diagnose the office’s relationship with principals and principal supervisors.

**Continuous Improvement Processes**

Entering the residency year, I knew that Anthony Bryk’s work would feature prominently in my project since much of the district’s continuous improvement processes and templates were built off his 2015 co-authored book *Learning to Improve*. Bryk and his co-authors argue that education reformers have repeatedly taken on large-scale reform efforts, based on best practice research, only to see those efforts fail, despite significant investments of time, people, and money. The authors hypothesize that this often happens because districts and schools are “going fast and learning slow” and fail to consider the full complexity of implementation and the need for iterative, context-driven adjustments.

In response, Bryk and his team advance six principles that represent foundational elements of improvement science:

- Make the Work Problem-Specific and User-Centered
- Focus on Variation in Performance
- See the System that Produces the Current Outcomes
- We Cannot Improve at Scale What We Cannot Measure
- Use Disciplined Inquiry to Drive Improvement
- Accelerate Learning Through Networked Communities
These six principles provide an action-oriented framework for building and sustaining cycles of continuous improvement. They align well with other theories of organizational improvement such as those in Peter M. Senge’s (1990) *The Fifth Discipline: The Art and Practice of The Learning Organization* and Robert Greene’s (2012) *Mastery*. The work of a high performing organization is not simply implementation fidelity; it is the ability to constantly be learning and improving on the execution of its key functions. I drew on several of the ideas from Bryk’s book including the use of driver diagrams, root cause analysis, measurement for improvement indicators, and low-inference data analysis. In addition, Bryk’s 2020 book *Improvement in Action: Advancing Quality in America’s Schools* provided six helpful case studies of his core principles in action.

Adapted from Bryk’s work, the Chicago Public Schools Continuous Improvement (CI) model is used across the central office, networks, and schools and includes the development of a CI strategic plan through a prescribed CI process. The CI process consists of an iterative *Plan-Do-Study-Act cycle* that is used for both strategy development as well as for progress monitoring, reflection, and course correction.

*Figure 3: The Chicago Public Schools Continuous Improvement Cycle*
Plan Strategy: The cycle begins with setting a vision for a future state based on researched best practices for each strategic priority.

“Do” the Strategy & Collect the Data: The second step of the cycle involves launching the work & collecting data to document how the work was implemented.

Study the Data and Ask Questions: The third step of the cycle involves analyzing the data and comparing it against the future state to glean insights for the next cycle.

Act in Response to Data & Needs: The final step is to decide what to do next based on new learnings and act accordingly.

My strategic project fell within the bounds of this established process, which included existing templates, timelines, practices, and habits.

Adaptive Change, Teaming, and Organizational Culture

Finally, research around adaptive change, teaming, and organizational culture informed my decisions and actions during the strategic project. Strategic planning processes, particularly within large, bureaucratic organizations, tend to be focused on technical aspects of change, with staff members’ time consumed by countless protocols, templates, spreadsheets, and meetings. However, districts face problems that lack clear answers or straightforward solutions (Heifetz et al., 2009). These adaptive problems require learning and experimentation along with psychological safety, “a shared belief held by members of a team that the team is safe for interpersonal risk taking” (Edmondson, 1999, p. 350). In his The Practice of Adaptive Leadership: Tools and Tactics for Changing your Organization and the World, Heifetz (2009) reminds leaders to “engage above and below the neck,” meaning people often need to be engaged in their
heart, mind, spirit, and guts (p. 37). Similarly, the Six Circle Model (Figure 4), developed by Steve Zuiebeck and Tim Dalmau based on the work of Margaret Wheatley, offers a useful lens for considering both the technical dimensions of an organization—structures, patterns, and processes—as well as the relational, or adaptive, dimensions of information, identity, and relationship (Safir, 2017).

*Figure 4: The Six Circle Model*

![Six Circle Model Diagram](image)

Throughout the strategic planning project, I sought to attend not only to the technical dimensions “above the green line” but also to consider ways to help make meaning of the changes by addressing information sharing, connection opportunities, and identity building.

Finally, related to adaptive change, I anticipated a need to develop and nurture effective teams, particularly the teaching and learning leadership team and the strategic priority working groups. Edmondson’s (2012) teaming framework proved helpful in building high-functioning teams that had a clear purpose, appropriate membership,
necessary structures, significant trust, and shared accountability. To support this effort, I also drew on materials from *Meeting Wise* (Boudett and City, 2014).

**Theory of Action**

Based on my conversations with CPS staff, my study of the district’s recent academic work, and my review of knowledge for action, I developed the following theory of action for my strategic project:

“If I collaborate with the teaching and learning leadership team to ensure focus and direction through a shared set of office priorities, and engage staff in ways to deepen their shared understanding of these priorities, monitor their progress towards completing the associated work, and continuously reflect on ways to improve this work, then school leaders and teachers will be supported with high-quality, aligned resources and professional learning, so that student outcomes improve as outlined in the district’s *Success Starts Here* vision and goals.”
Description, Evidence, and Analysis of the Strategic Project

Description

My strategic project consisted of three phases: 1) Drafting an officewide strategic plan, 2) Launching teaming and implementation structures, and 3) Promoting ongoing collaborative inquiry, progress monitoring, and future planning. The following section describes my work across each of these three phases.

Phase 1: Drafting an officewide strategic plan.

Entry into the Office of Teaching and Learning - June 2020

I entered Chicago Public Schools as a doctoral resident in the Office of Teaching and Learning where Dr. Sherly Chavarria, chief of teaching and learning, served as my supervisor (see Appendix A for CPS Organization Chart). Dr. Chavarria moved into the position in February 2020 after serving for six months as the office’s deputy chief. In the months prior to my entry, Dr. Chavarria not only led the March transition to remote instruction due to Covid, but also collaborated with her team to draft an office theory of action and instructional vision for the district.

The new office-level theory of action outlined the key levers of change as well as desired outcomes for their collective work (Figure 5).
If we, in partnership with other offices,...

1. collaboratively define and uplift a shared **district instructional vision** anchored in equity and the instructional core, aligned to our core values;
2. create and monitor **academic policies** aligned to the district instructional vision;
3. develop and curate research-based **resources, professional learning, and measurement tools** that exemplify quality in the instructional vision;
4. and leverage coherent **structures for continuous learning** that employ those professional learning and resources and utilize existing systems across departments and schools;

then all departments, offices, school leaders, and teachers will converge around a unified and measurable path aligned to the instructional core; have equitable access to research-based, quality resources; and have the mechanisms necessary to support and **build educator capacity and improve student learning outcomes** to achieve the CPS vision.

In addition to drafting a theory of action, the teaching and learning leadership team worked to craft a bold and inclusive vision for high-quality instruction based on the instructional core that centered identity, relationships, and community in the interaction between student, teacher, and content (**Figure 6**).
Finally, as I started my residency, the office was kicking off its annual continuous improvement strategic planning process to define the body of work it would undertake in the upcoming school year to deliver upon this theory of action and instructional vision.

At one of the first T&L leadership meetings I attended, Dr. Chavarria explained her desire to move from having each department (Literacy, STEM, Social Studies, Arts, Assessment, Personalized Learning, etc.) write its own strategic plan, as had been the practice in recent years, to writing a singular, shared strategic plan for the office. Her rationale included the fact that when she entered the role, she struggled to articulate the office’s focus or impact, and she knew other offices and school-based staff also struggled to understand the district’s teaching and learning priorities or how to access support. The teaching and learning leadership team expressed universal enthusiasm for this approach.

During June 2020, I held one-on-one meetings with fourteen directors in the Office of Teaching and Learning. I asked a standardized set of questions that helped deepen my understanding of the district, about each director’s scope of work, and about their hopes and fears. I also held calls with a set of stakeholders such as funders, partners,
principals, and teachers to learn more about their perspectives on district improvement. Finally, I carefully reread the district’s bold strategic plan to understand the set of public commitments that fell within the purview of the teaching and learning office.

*Shifting to an Officewide Plan - July 2020*

Starting in July 2020, Dr. Chavarria, the T&L directors, and I began by soliciting input on the SY20-21 T&L officewide strategic priorities. Given the uncertainties of the upcoming year due to Covid, we hoped to settle on a set of priorities that were responsive to the immediate needs of the field as well as aligned with long-term goals. A strategic planning team, composed of 10 of the 14 T&L directors, met weekly to develop and monitor the planning process (*see Appendix C for the composition of this team*). In the beginning, this team used several tools from Bryk’s *Learning to Improve*, such as a driver diagram and root cause analysis, to further develop the office’s theory of action and to surface potential officewide priorities.

After a series of discussions with stakeholders across the office and the district, **four high-level priorities** emerged:

1. Grade-level, standards-aligned instruction via district-wide professional learning opportunities
2. Access to high-quality, culturally relevant curriculum
3. School-based academic program models such as Arts, IB, AP, Gifted, Magnet, Personalized Learning, and STEM.
4. High school supports.

Throughout this process, I noted numerous department level initiatives—such as new teacher mentoring, academic competitions, and financial education—that directors
determined failed to rise to officewide priorities. With the four priorities in place, we then moved to a robust drafting process to flesh out the work of each priority.

Writing an Officewide Plan - August 2020

In late July, Dr. Chavarria and I selected priority leaders, and we formed writing teams for each priority. These cross-functional writing teams used the district’s Continuous Improvement (CI) template, via Google Sheets, to discuss and draft the following plan components: Future State, Current State, Evidence, Root Cause Analysis, Theory of Action, Change Ideas, Milestones, Implementation Goals, and Impact Goals. (See Appendix C)

The strategic planning team continued to meet weekly to monitor and improve the drafting process. We also pressure tested the emerging theories of action and change ideas. I became especially involved in the crafting of the priority 1 plan (professional learning to support grade-level instruction), as it required careful attention to both the immediate needs of the field during Covid-required remote and/or hybrid instruction and longer-term strategies to support school-based cycles of content-specific learning.

Drafting Implementation and Impact Goals - September 2020

I spent September finalizing the change ideas and working with staff to draft meaningful implementation and impact goals. I worked closely with the continuous improvement and strategic planning leads in the district CEO’s office to think more deeply about mechanisms for articulating and gathering data aligned to these implementation and impact metrics. We sought to answer the question, “How do teaching and learning staff know what impact they are having on teacher practice and student outcomes?” Meanwhile, I worked with the director of assessment to lead consultancies
for each priority group to explore research and practice around measuring impact in their area, particularly in increasing teachers’ knowledge, improving teachers’ practice, changing the student learning experience, and improving student learning outcomes.

The articulation of meaningful implementation and impact goals was challenging as most of the district’s usual student assessments (e.g., DIBELS, NWEA) were not administered due to the pandemic. Through discussions with the chief, we settled on attendance and grades as key student outcomes for our immediate work. Additionally, we would use common exit tickets and feedback surveys to track teacher-focused goals.

Department Priority and Project Tracker

Meanwhile, I also led the development of a tool to track department work projects—both those aligned to the four officewide strategic priorities and stand-alone department-specific projects. (See Appendix C). Completed by each director and their team, this tool provided a high-level look at the work of the fifteen departments within the Office of Teaching and Learning. Dr. Chavarria and I used the tool to better “see the system” (Bryk, 2015) and to have conversations about resource allocation (people, time, and dollars).

Phase 2: Launching teaming and implementation structures.

Forming Strategic Priority Working Groups - October 2020

During the first week of October, we formally transitioned from drafting to implementation. Chief Chavarria transitioned the leadership of the Tuesday strategic planning meetings to me, and that group continued to meet to guide the implementation
of the strategic planning process. Additionally, bi-weekly Thursday directors meetings provided an opportunity to update and engage with the entire T&L leadership team.

The strategic planning meetings provided an important forum to advance both the project objectives as well as my leadership goals. I drafted the agendas and facilitated these weekly meetings and used the Meeting Wise checklist to ensure clear purpose, outcomes, roles, norms, and time allocations (Boudett & City, 2014). To better use meeting time as a professional learning and collaboration opportunity, the strategic planning meetings leveraged the following routines: welcome, framing, follow-up from previous meeting, learning activities, engagement and input opportunities, decision-making, next steps, and closing feedback. The running notes from these meetings capture evidence of convergent thinking, continuous improvement, and collaborative teaming.

In mid-October, we launched working groups for each priority. Collaborating closely with the strategic planning team members, I drafted an overview of the purpose, role, and expectations of these priority working groups. We identified working group members and launched the groups in the final two weeks of October. These groups met every other Thursday to advance the work of the strategic plan priority milestones. The key functions of the Strategic Priority Working Groups are outlined in the following table.

<table>
<thead>
<tr>
<th>Office of Teaching and Learning Strategic Priority Working Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Function</strong></td>
</tr>
<tr>
<td><strong>Co-Production</strong></td>
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<tr>
<td></td>
</tr>
<tr>
<td><strong>Feedback and Critique</strong></td>
</tr>
</tbody>
</table>
Cooperation, Convergence, and Coherence

- Information sharing and opportunities for shared learning between departments around the priority work.

Communication and Advocacy

- A space to consider ways to better communicate and champion the work of the priorities.

Project Management

- Continuous reflection on strategy - How can we best move this work? What are the key opportunities? What are the challenges?
- Updating project timelines and associated calendar of milestones, deliverables, and events

Supporting the strategic priority working group leads

I spent time supporting the four leads of the working groups with the necessary adaptive and technical change management tools such as meeting agendas, protocols, knowledge management, and engagement strategies. For instance, at one strategic planning meeting, which I now facilitated in place of Dr. Chavarria, I shared leadership models beyond the traditional hierarchical approach that is pervasive in urban school districts. The National Equity Project’s Leading for Equity Framework was one such tool. I also drew from templates and protocols provided by Meeting Wise and the School Reform Initiative. We discussed ways to distribute facilitation of the working group meetings, increase voice and contributions from additional team members, and create richer opportunities to gather feedback about the work.

Supporting the teaching and learning leadership team

Additionally, during this month, I began co-facilitating with directors professional learning sessions during the biweekly teaching and learning leadership meetings. During these engagements, I introduced the team to deliberately developmental organizations from Kegan et al (2016), radical candor from Scott (2017), and team number one from...
Lencioni (2014). We also engaged in a series of exercises designed to build interpersonal trust and psychological safety. Directors appreciated these sessions as opportunities to grow their professional tool kit and to strengthen their relationships with one another.

**Phase 3: Promoting collaborative inquiry, progress monitoring, and future planning.**

*Quarter 1 Reflection and Progress Monitoring - November 2020*

In fall 2020, we held several important engagements to advance the work of the strategic plan. First, on Friday, October 30th, we held an officewide virtual retreat with all 150 T&L staff members. During this retreat, the priority leads presented a high-level overview of the strategic plan priorities. Departments then met to discuss implications of the plan for their work and began conversations about how to better align their department workstreams to the office priorities.

Second, we held a Beginning-of-Year (BOY) Continuous Improvement Progress Monitoring session. This two-hour session on Friday, November 13th provided an opportunity for collaborative problem-solving after the completion of quarter one of the academic year. We used a consultancy protocol to discuss the progress of priorities one and four. The session combined early implementation data with a well-articulated problem of practice, modeling a design that working groups could carry over to their bi-weekly meetings.

Finally, Dr. Chavarria and I reviewed the strategic plan with Chief Education Officer LaTanya McDade on Thursday, December 10th. During this two-hour discussion, we reviewed the plan with Chief McDade and received her thoughtful feedback. Supportive of our prioritization and coherence efforts, she encouraged three areas of
continued focus: 1) ongoing collaboration between T&L and the Office of Network Supports, 2) careful progress monitoring to promote internal accountability, and 3) sharpening our implementation and impact goals to better link T&L actions to improvements in teacher practice and student outcomes.

**Supporting working groups and collaborative teaming – December and January 2021**

During the months of December and January, my attention turned to supporting the priority leads and working groups in both collaborative teaming structures as well as advising on the content of their work. However, during this time, much of T&L staff members’ time was focused on reopening schools. I was careful to balance longer-term strategic planning work with the immediate needs of supporting teachers and students in a February return to in-person schooling.

**Mid-year progress monitoring – February 2021**

In February, I led the preparation for and facilitation of a two-hour mid-year reflection session. Like the beginning-of-the-year session, this virtual convening offered an opportunity to bring all T&L directors’ attention back to the officewide priorities, identify areas of progress, discuss problems, and collectively preview upcoming work. The session was a pivot point for turning more attention to activities that would position the district to best support necessary post-pandemic academic recovery going into the summer and 2021-2022 school year.

**Recommendations for future CI planning cycles – March 2021**

In the final month of my residency, I prepared a memorandum outlining my recommendations for future continuous improvement and strategic planning efforts, including a project plan, timeline, and templates. My goal was to leave the office on a
successful path to continue and improve the work accomplished during the 2020-21 school year.

Evidence

In this section, I provide emerging evidence aligned to the components of my theory of action:

“If I collaborate with the teaching and learning leadership team to ensure focus and direction through a shared set of office priorities, and engage staff in ways to deepen their shared understanding of these priorities, monitor their progress towards completing the associated work, and continuously reflect on ways to improve this work, then school leaders and teachers will be supported with high-quality, aligned resources and professional learning, so that student outcomes improve as outlined in the district’s Success Starts Here vision and goals.”

Measures of Success

Over the course of my residency, I completed the following activities and deliverables that serve as evidence of implementation of the if statements of my theory of action.

- Conducted a Review of Knowledge for Action on continuous improvement, central office transformation, strategy in action, and coherence building.
- Developed an officewide T&L strategic plan with four shared priorities.
- Developed communication collateral for strategic plan (e.g., documents, tools, graphics, presentations).
• Developed and ensured completion of project management tool and progress monitoring protocol.

• Drafted and supported implementation of suggested protocols for continuous learning process cycles for T&L departments.

• Drafted BOY and MOY CI session materials and mid-year CI report.

• Developed recommendations for future T&L CI work.

The following table provides a timeline of strategic project milestones over the course of my 10-month residency.

<table>
<thead>
<tr>
<th>Date</th>
<th>Milestone</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 11, 2020</td>
<td>Strategic Plan Drafted</td>
<td>Completed T&amp;L strategic plan</td>
</tr>
<tr>
<td>September 30, 2020</td>
<td>Project Management Tracker Completed; Progress Monitoring Protocol Developed</td>
<td>T&amp;L Directors and team articulated all department work and tagged action items to an office or department priority</td>
</tr>
<tr>
<td>September 30, 2020</td>
<td>T&amp;L Strategic Plan Overview Presentation Completed</td>
<td>Documents, graphics, and presentation to clearly communicate T&amp;L vision and priorities</td>
</tr>
<tr>
<td>October 1, 2020</td>
<td>T&amp;L CI progress monitoring protocols and process launched</td>
<td>Tools and resources to support ongoing CI work by T&amp;L departments</td>
</tr>
<tr>
<td>October 15, 2020</td>
<td>Launched T&amp;L staff professional learning convergence series</td>
<td>Opportunities for T&amp;L staff to engage with T&amp;L vision and priorities; T&amp;L Team Retreat</td>
</tr>
<tr>
<td>November 26, 2020</td>
<td>Beginning of the Year Continuous Improvement Session Completed</td>
<td>A formal touchpoint to reflect on CI process to date, collaborate with key stakeholders on process, and make any strategy course corrections in response to new information.</td>
</tr>
<tr>
<td>Date</td>
<td>Event Description</td>
<td>Description</td>
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<td>-------------------</td>
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<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>February 20, 2021</td>
<td>Middle of the Year Continuous Improvement Session</td>
<td>A formal touchpoint to reflect on CI process to date, collaborate with key stakeholders on process, and make any strategy course corrections in response to new information.</td>
</tr>
<tr>
<td>February 28, 2021</td>
<td>Middle of the Year CI Report Completed</td>
<td>Middle of year reports completed for review.</td>
</tr>
<tr>
<td>March 1, 2021</td>
<td>Launched Network staff professional learning convergence series</td>
<td>Opportunities for Network staff to engage with T&amp;L vision and priorities; focus on implementation, feedback, and support.</td>
</tr>
<tr>
<td>April 1, 2021</td>
<td>Recommendations for School Year 2021-22 Strategic Planning</td>
<td>A set of content and process recommendations along with project plan and timeline.</td>
</tr>
<tr>
<td>May 29, 2021      (Post-Residency)</td>
<td>End of the Year Continuous Improvement Session</td>
<td>A formal touchpoint to reflect on CI process to date, collaborate with key stakeholders on process, and make any strategy course corrections in response to new information.</td>
</tr>
</tbody>
</table>

I planned for the above activities and deliverables to improve the knowledge, skills, and mindsets of the directors and staff in the Office of Teaching and Learning (T&L) across the following indicators:

- T&L directors feel supported in this year’s ongoing CI work.
- T&L and central office staff deepen their shared understanding of the district’s instructional vision and priorities.
- Network staff deepen their shared understanding of the purpose and nature of the district’s work in teaching and learning.
T&L staff clearly articulate how their day-to-day actions link to the office’s annual priorities.

*Feedback from Meetings, Conversations, and CI Sessions*

Throughout my residency, I conducted formal and informal surveys and allowed for numerous feedback opportunities to gather information about whether staff felt that the office was making progress in prioritization, coherence building, and continuous improvement practices. I frequently asked about staff’s experience with structures, systems, and practices as well as about our collective efforts to improve information sharing, build relationships, and strengthen professional identities. Often, I captured the formal feedback via Google Forms and have included a representative sampling of these results in the figures below. Staff repeatedly agreed that our meetings and processes were fostering coherence, supporting collective inquiry, and providing an opportunity for open and honest conversations. Open-ended questions about what worked and what needed improvement elicited responses such as, “I appreciate getting a chance to talk and problem solve with colleagues from other departments and offices. I feel like we are building much stronger relationships and connections than ever before, which is kind of amazing considering that we are remote right now!”

The charts below provide a snapshot of some of the feedback T&L staff provided after various strategic planning and continuous improvement sessions. Most participants agreed or strongly agreed with statements that asked about shared understanding of the priorities, continuous improvement practices, and action-oriented discussions.
Finally, my strategic project’s longer-term outcomes (the *then statement* in my theory of action) focused on improving the experiences of school leaders and teachers due to better focus, prioritization, coherence, and culture in the central office. These outcomes included:

- School leaders and teachers have a shared depth of understanding about the purpose and nature of the district’s instructional work.

- Strategies, structures, processes, relationships, information sharing, and understood roles/responsibilities support the ongoing fostering of this shared instructional vision and priorities.

- School leaders and teachers feel like they receive coherent instructional support from all central office and network staff.
Given the scope and timeline of my residency and strategic project, I was unable to measure, track, and analyze these longer-term outcomes. However, the district has an annual end-of-year principal and teacher survey tool which could be useful in assessing whether progress has been made in these areas. Based on conversations this year, I am confident that T&L staff will continue to consider additional ways to measure its impact on school-level outcomes.

Analysis

Despite the challenges presented by the pandemic and the remote work environment, I succeeded in delivering on the technical aspects of my strategic project by shepherding an officewide strategic plan from ideation to implementation. After reflecting on the reasons for the project’s success, I found important connections to Mark Moore’s Strategic Triangle. I did not anticipate using the framework in this project, but in retrospect, I see connections to Moore’s theory, especially as applied to my work to support internal changes within the Office of Teaching and Learning. I was fortunate to be working in a positive authorizing environment, on a project that had value for the office, and was afforded the resources I needed to complete the project. Each of these aspects contributed to the technical completion of the deliverable and the beginnings of adaptive change, teaming, and capacity building.

First, I was fortunate to be working within a clear authorizing environment, with key district leaders such as the Chief Education Officer endorsing and supporting my project and my role. The district’s Continuous Improvement (CI) process is widely regarded to be a body of work that garners the attention of district leadership, with the executive office devoting dedicated staff to the work. These sources of legitimacy,
particularly explicit support from the Chief of Teaching and Learning, helped ensure that T&L staff members engaged in our meetings, responded to my inquiries, and completed required tasks.

Second, the project contributed value in the eyes of the T&L office staff members. During my entry interviews with T&L directors, a common refrain was a desire for more prioritization and direction for their work and for more collaboration between departments. As one director explained, “We are not good at setting priorities which means that you cannot focus your time and attention. You feel stretched and overwhelmed” (personal communication, July 2020). Another hoped that the strategic planning process would “Get us out of our silos because we are not going to reach our district vision without the collective effort of all” (personal communication, July 2020). Throughout my residency, directors expressed appreciation for the plan’s focus and for the opportunity to work together as an office leadership team, rather than just department heads. One director shared, “I’m super excited about the joint T&L plan. Many of us have wanted this for a while and that we are making it happen is fantastic” (personal communication, July 2020). Overall, the clarity offered by having officewide priorities along with increased inter-departmental collaboration were especially important in this year of uncertainty caused by the pandemic.

Third, my residency added necessary capacity to support the office’s CI work. I had both the time and the ability to support this process. Additionally, my position at the office-level, rather than department-level, allowed me to better support cross-department prioritization and collaboration. Through my organization of the strategic planning team meetings, I was able to advance the work by focusing on systems, structures, and a
culture of continuous improvement. Absent my role, the already busy T&L directors would have had to assume this work themselves.

Finally, the scope and framing of the project itself contributed to its success. Much of my work focused on internal coherence within the Office of Teaching and Learning. Given the length of the residency, the scope of the project, the challenges of the remote work environments, and my positioning under the chief of teaching and learning, I had limited influence on offices outside of teaching and learning. However, with a set of priorities in place, T&L directors have already begun to build a shared understanding of that work with their colleagues across central office.

I will now consider some of the successes and remaining challenges as related to the goals of my strategic project, namely, 1) fostering focus and prioritization at the office level, 2) building officewide coherence, 3) clarifying the role of the central office in instructional improvement, and 4) supporting a culture of continuous improvement.

*Fostering Focus and Prioritization*

My strategic project yielded greater focus and prioritization for the district’s Office of Teaching and Learning. By early September, the T&L chief and leadership team had settled on four priorities for instructional improvements: 1) professional learning to support grade-level instruction, 2) high-quality, culturally relevant curriculum, 3) school-based academic program models such as International Baccalaureate, Arts, or STEM, and 4) content-specific support for high schools. These *big rocks* or *key levers* provided direction to departments as they sought to organize their time and efforts. Moreover, the priorities were deep and intentional, asking T&L staff to focus on doing a few things well. The strategic planning process required cross-department teams to
collaborate around current state and future state descriptions, root cause analysis, and best practice research to settle on priority-specific theories of action and milestones.

Notably, by December, the working groups realized that priority 1 (professional learning to support grade-level instruction) and priority 4 (content-specific support to high schools) had many overlapping initiatives. As such, these two working groups merged into a single working group focused on building a tiered system of professional learning to support grade-level, content-specific instruction. The teaching and learning staff were moving towards three key levers for instructional improvement, simplified as: 1) professional learning, 2) curriculum, and 3) school-based academic programs. Importantly, these three levers focused squarely on the instructional core, the interaction between students and teachers in the presence of content.

As Curtis and City (2009) assert, strong leaders recognize where complexity exists and simplify it. In turn, improvement in school districts requires leaders who foster coherence out of organizational incoherence and navigate complex and ambiguous environments. My support of the office’s distillation of their complex work into three priorities helped organize and streamline various workstreams. The chief of teaching and learning reflected on this progress when she explained, “Prior to this year’s strategic planning process, I would struggle to explain the work of our collective office. Now, I can clearly communicate our vision, theory of action, and key bodies of work, as well as how those work streams contribute to the student outcomes” (personal communication, December 2020). Additionally, knowledge of this vision, theory of action, and associated priorities was growing among T&L staff members. For example, a new director was hired in November and during a strategic planning team meeting she wondered aloud,
“So, about these priorities, will my team members know about them?” In response, the outgoing director said, “Oh, your team not only knows the priorities, but they also know how they contribute and how they are accountable for progress.”

Despite the office’s successful focusing and prioritization of work, challenges remained. First, to some degree, the priorities were becoming catch-all umbrellas for numerous underlying workstreams and initiatives. By December, working groups had identified three to four theories of action for each priority, with each theory of action linked to three to five implementation goals and three to five impact goals. I created a spreadsheet to inventory all the officewide goals and was astonished to find a total of 54 implementation and impact goals that were to be tracked and achieved within the 2021-2022 school year. I wondered if the priorities were beginning to become priorities in name only. I realized that while we had spent significant time discussing and determining the officewide priorities, we failed to spend enough time discussing and determining what to stop doing. I learned that it is as important to agree on what not to do as it is to determine what to do.

Second, in preparing for the officewide plan Dr. Chavarria and I wanted to ensure we were surfacing the work so we could better see the system (Bryk, 2015). The priority working groups and directors cast a wide net and attached a range of work to each priority. Separately, in facilitating the completion of the department work tracker, I noticed how directors were often tasked with completing a host of legacy projects that they had inherited over time. These projects often had a targeted constituency, key external partner, or were politically difficult to end. Other times, directors were protective of their body of work. As one director told me, “I’m hoping that the strategic planning
process—with cross-content convergence—moves us forward. I know it is built on good intentions, but collaboration is challenging in practice. *We hold our content areas so dearly, and often clamor over time, attention, and resources.* By connecting our work to the strategic plan, we will hopefully be able to integrate more—especially in the elementary level. I think the CI process will really help us there” (personal communication, July 2020). The siloed nature of departments combined with the tendency to hold onto department-specific projects led to the continuance of workstreams beyond those that advanced the officewide priorities.

Finally, each CPS school and department across a dozen central offices creates its own continuous improvement plan, thus identifying their own priorities, workstreams, and measures of success. While my strategic project saw progress on bringing prioritization, coherence, and a collaborative culture to the Office of Teaching and Learning, the district still had a myriad of districtwide, office level, and school-specific priorities—all competing for limited time, dollars, and attention.

**Building Coherence: A Shared Understanding of the Work**

In addition to focus and prioritization, my strategic project increased coherence, “the shared depth of understanding about the purpose and nature of the work” (Fullan and Quinn, 2016, p.1). Through purposeful action, interaction, capacity building, clarity, precision of language, transparency, progress monitoring, and continuous reflection, the staff members within the Office of Teaching and Learning deepened their learning and collective capacity to support a set of shared priorities.

In their book *Strategy in Action: How School Systems Can Support Powerful Learning and Teaching*, Curtis and City (2009) talk about the importance of high-
functioning teams to both organizational health and to improving instructional quality and learning for all students. During my residency, I saw three important teams strengthen. First, the T&L directors became more of a leadership team rather than a collection of department heads. This team met regularly, set and upheld meeting norms, built relational trust, and held team members accountable to their commitments. Progress by this team had a direct impact on the success of my strategic project as directors felt more comfortable wearing two important hats: one as an office leader and the other as a department head.

Second, my strategic planning team was an important forum for coherence building. The regular meeting of this team became a place for testing ideas, getting feedback, troubleshooting, and charting the course. We frequently reflected on how to best advance the strategic plan, support the priorities leads, and strengthen the working groups to ensure continued success. The strategic planning meetings were also sources of reassurance and support as we led during the uncertainty caused by the pandemic.

Finally, the strategic priority working groups and subgroups operated at varying degrees of effectiveness. In general, I saw how the more effective teams – with enacted norms, clear purpose, mutual trust, and well-designed agendas – were more successful in building coherence and moving forward the priority workstreams. Where issues arose, I often met individually with working group leads to help problem solve or co-create solutions.

Despite the progress, there were several challenges to fostering coherence within the office. The PELP Coherence Framework suggests that successful district strategy must align culture, structure, stakeholders, systems, and resources with a well-articulated
vision for teaching and learning (Childress et al., 2011). One significant system for alignment relates to budget allocation. Currently, CPS’s budget development calendar does not align with the strategic planning calendar. As such, any work outlined in July’s strategic plan had to be accomplished with a budget that was approved in March. Second, the managers and specialists within the office were key stakeholders and integral to the success of the plan. However, while I interacted frequently with the office directors, I failed to enact strong enough internal feedback mechanisms to allow meaningful input from all teaching and learning staff. Third, the office did not have strong systems in place for the timely access to data, particularly this year due to pandemic disruptions. Regular use of data can be an important coherence building mechanism (Curtis and City, 2009), but anytime working groups tried to gather data, it was either unavailable (often due to data collection disruptions caused by the pandemic) or it was difficult to pull and assemble. Finally, time was a valuable and scarce resource.

On feedback forms I often read comments such as, “I wish we had more time for discussion and analysis” or “More time needed for problem solving.” The time we did spend together was entirely over Google Meets and suffered the limitations of a virtual work environment. While one positive of remote working was that it offered a way to get input quickly across geography, the strategic planning work often called for extended sessions of discussion, analysis, perspective taking, and problem solving. These are the types of meetings that I love facilitating in a retreat-like setting, full of chart paper, post-it notes, and breakout groups. As we gathered for another video meeting, I often heard comments from participants like this one from a director: “I really wish we were in person to do this kind of work.”
Clarifying the Central Office’s Role in Instructional Improvement

My strategic project further clarified the central office’s role in instructional improvement. Building off the Office of Teaching and Learning’s theory of action, the strategic planning process successfully engaged staff in a root cause analysis and subsequent drafting of a robust driver diagram. These processes helped refine various logic models that linked central office actions to school-level outcomes. For example, the academic programming work group carefully mapped its desired future state to its current and aspired supports for each program model.

However, I noticed several nuanced tensions regarding the role and scope of responsibilities of central office staff. One issue that surfaced repeatedly during my residency was that of audience and scale. Namely, who should be the main audience for T&L’s professional learning and technical assistance? With over 600 schools and 14,000 teachers, this question also brought up issues around impact at scale. T&L simply does not have the capacity to directly support all teachers, or all schools. One key audience of the Office of Teaching and Learning’s strategic priority work was the 50 Instructional Support Leads who report to Network Chiefs. Given the immediate demands of remote instruction, this year’s strategic plan included numerous direct-to-teacher workshops and professional learning opportunities. Attendance by teachers was often low for any given workshop (typically 10-15% of teachers). I spent significant time consulting with directors thinking through questions of audience and scale. More work remains to clarify exactly how T&L hopes to support instructional improvement at scale.

Second, much of this year’s strategic planning work was focused on building systems, structures, and resources for longer-term support of teachers and students:
creating curriculum, building professional learning models, training support staff, crafting assessment strategy, updating polices, and assembling tools and resources for support. I helped navigate the tension between providing immediate resources and supports and building longer-term systems. Ultimately, office staff needed to balance both demands, and the workstreams under each priority of the office’s strategic plan reflected this balance.

Third, during the project, I frequently encouraged T&L staff to think differently about their implementation and impact goals. Often, these goals focused merely on T&L outputs, e.g., “we will host 5 workshops,” rather than on teacher or student outcomes. As one T&L manager powerfully shared after a November CI session,

Seeing more evidence of how instruction has been impacted is my suggestion for improvement. I know on one report 80% of participants said that the PL’s [workshops] were helpful, but can we zoom in and get more specific information? For example, can we see evidence of change/improvements in student work? I want to see strong evidence from student work and engagement, not just self-reporting from teachers, and I think taking a moment to zoom in on those positive changes that are occurring on a micro-level can better inform changes on a larger level, as well as bring a level of positivity to these meetings. It would remind us why we do this work, while providing validation that change is happening (personal communication, November 2020).

In response, I mapped and coded all T&L goals using the following scale: 1) T&L staff actions (such as offering a workshop) 2) feedback from participants on efficacy, 3) changes in knowledge or skill of participants, 4) changes in daily practice of participants, 5) changes in student experience, and 6) changes in student outcomes. Using this map as a starting point, I was successful in helping several staff think about ways to better connect their goals to teacher and student outcomes.

Finally, as I entered the district I heard about the history of the relationship between the Office of Teaching and Learning and the Office of Network Support. Roles
and responsibilities of staff members were often unclear, or even competing. In my experience, the relationship between district program offices such as teaching and learning and school supervision offices such as network support is critical. Fortunately, I saw how the strategic plan – with its vision, theory of action, and priorities – and the current leaders of both offices have helped clarify and strengthen this relationship. One director shared, “The interaction between T&L and ONS is getting so much better - that was a huge issue in the past. We did not talk to another at all” (personal communication, October 2020).

Supporting a Culture of Continuous Improvement

Chicago Public Schools has a history of top-down change. While Chief Executive Officer Jackson values and creates opportunities for feedback, the hierarchical culture throughout the district remains strong. In many ways, this organizing to execute has been a strength. District leaders set a goal, delegate, resource as best as possible, and then hold staff accountable for results. However, this system often rewards a focus on short-term outcomes and completion of tasks, rather than deliberate attention either to longer-term planning or small, rapid cycles of implementation, review, and improvement.

I occasionally noted this tension during the strategic planning team meeting where some members were very focused on execution and content while others were more focused on the learning and process. In response, I began using the meeting objectives and agenda to explicitly call out when we were using disciplined inquiry and when we were making decisions. I also tried to keep our conversations user-centered and problem-centered when possible, rather than focus merely on project and milestones. We returned often to the purpose and desired future state of the work.
The district’s focus on execution and results also made staff hesitant to trying anything that would not be a guaranteed success. This risk presented by failure was often high. Edmondson (2019) describes psychological safety as “the belief that the work environment is safe for interpersonal risk-taking” (p. 8). This safety is linked to how leaders frame and respond to failure. She explains, “unless a leader expressly and actively makes it psychologically safe to do so, people will automatically seek to avoid failure” (p. 160). Accordingly, I had two conversations with staff members who were hesitant to add anything to the strategic plan that did not fall fully within their locus of control. This cautious approach led some to gravitate towards discrete projects with clear deliverables (e.g., a workshop, a guidance document) as they saw these as safe commitments.

Finally, the lack of time for collaborative inquiry was a frequent concern among T&L staff. While this was a particularly busy and uncertain year due to the pandemic, the time pressures have an important link to focus and prioritization. The clearer the offices priorities, the more time staff have available to dedicate to deep engagement, prototyping, user feedback, interaction, and refinement.

In summary, I believe my strategic project advanced the office’s goals to focus and prioritize a clear body of work and then to build shared understanding of that work among all staff members. I harnessed structures, systems, and tools to advance this work as well as focused on relationship building, information sharing, and identity development. Despite this progress, work remains to foster a collaborative, user-centered, problem-focused culture. While the global pandemic added significant stress to the system and staff this year, all evidence points to the office being better organized to provide meaningful and coherent school support.
Implications for Self

My career in education, first as a teacher and then as a district leader, has focused on the potential of high-quality teaching and learning to transform student experiences and outcomes. Specifically, I have spent over a decade exploring the role of a district’s academic office in advancing high-quality teaching and learning across a school system. In practice and reflection, I learned a great deal during my doctoral residency, and through my strategic project I deepened my understanding of system thinking, change management, coherence building, and continuous improvement processes.

Planning: Strategic, Tactical, and Operational

First, my residency provided an important opportunity to build my skills around tactical planning. Mid-way through the residency I discovered, through the website of the Council of Great City Schools, literature about three kinds of planning: strategic, tactical, and operational (Eugene, n.d.). In the past, my strengths have centered on strategic planning and operational planning. I generally enjoy thinking about systems and strategies as well as rolling up my sleeves to complete the work. I have historically been weaker at tactical planning and leveraging consistent systems and structures to support and monitor organizational development and continuous improvement. The opportunity to think and act in this tactical space during the residency helped me see the importance of project management tools, engagement and feedback strategies, and collective teaming. These structures and processes are lynchpins to fostering greater coherence. Thus, in my future work, I plan to leverage tactical planning along with strategic and operational planning.
**Process as Outcome**

Second, much of my strategic project work was oriented toward supporting a thoughtful planning and implementation process; this was an important stretch for me as, in past roles, I tended to place a heavy emphasis on the content of the work, often at the expense of the process. In future roles, I want to foster thoughtful processes that support both the work and the people doing the work. This process focus is also important for elevating voice, ensuring representation, building investment, and promoting equity.

Specifically, the biweekly strategic planning team meetings that I led provided an important space to pay attention to process (the *how* of the work, not just the *what*). It was here that I realized strong protocols and a learning orientation would not only help build investment in the work but also improve the content as we made changes, considered multiple perspectives, and generally improved the strategy. Additionally, this group became a laboratory for testing various leadership and facilitation moves (e.g., Meeting Wise agendas, feedback protocols, trust building activities, ideation sessions). I began to shift my mindset from what Bryk (2017) calls “going fast and learning slow” to “learning fast to implement well” (p. 7). I will apply this new process orientation to future projects and collaboration opportunities.

**Relationships Matter**

Kaya Henderson, former Chancellor of DC Public Schools, used to tell me, “We are in the people development business.” This residency reinforced the importance of strong relationships. To build trust and legitimacy during my residency, I strove to learn alongside others and approached the work with an inquiry stance: asking questions,
listening, and attempting to understand others’ perspectives. At times, I tried to
demonstrate vulnerability by sharing when I did not know something and by
acknowledging complexity and uncertainty. Meanwhile, I tried to create connections with
others through shared past and current experiences. By nature of the residency role, I was
fortunate to be in many different spaces, namely collaborative meetings at various levels
of the organizations and with various teams. This access provided me with significant
information and with the subsequent ability to make connections for others throughout
the organization. As I gathered more information, made connections between
workstreams, answered questions, and navigated complexity, I felt staff begin to see me
as a resource for advice and support. As somebody who values context and information
(so says my annual StrengthsFinder assessment), I want to continue to leverage this
strength during future leadership opportunities.

Working and Learning in the Context of a Global Pandemic

Finally, completing my residency during a global pandemic offered many lessons.
During my residency, I never met any of my CPS colleagues in person. I quickly
discovered that I missed in-person interactions. I learned how important conversations
before or after meetings, over cups of coffee, and at lunch are to navigating a leadership
role. Having worked in an office environment for over a decade, I struggled to make the
same connections in the remote world. I also missed spending time in schools and
classrooms, seeing instruction, meeting with teachers, and talking to students. These
interactions feed my soul. As such, I learned that my future work roles must allow for
daily personal interaction and at least some connection to schools, classrooms, teachers,
and students.
**Implications for Site**

Based on my residency experience and reflection on my strategic project, I have identified several implications for Chicago Public Schools regarding a continued need for focus, coherence building, continuous improvement processes, and celebrating success.

*Focus, prioritize, and sequence.*

I recommend that the district continue to prioritize and sequence initiatives through the following four actions: 1) Encourage all offices to adopt an officewide strategic planning process, moving away from department level strategic plans, 2) Better align planning between schools, networks, and offices by taking a user-center, problem-centered design approach, 3) Return often to the *Success Starts Here* five-year plan and prioritize and sequence the numerous articulated actions and initiatives, and 4) Hire a district chief of staff who has demonstrated success in fostering districtwide focus, prioritization, and coherence.

Additionally, Chicago Public Schools should better align the budget timeline with the strategic planning timeline to fund annual priorities and defund unaligned, legacy initiatives. Specifically, I recommend officewide strategic planning occur in January and February of each year, followed by the annual March budget process. Thus, central offices would be able to communicate district priorities in the spring, and the summer months would be focused entirely on supporting schools for a successful August opening. Data systems can also be better leveraged for shared understanding of progress against goals. Conversations must be rooted in evidence and a common refrain should be “How do you know?” I recommend investment in a data system and set of metrics that are tracked and analyzed jointly across offices, especially between the Office of Teaching and Learning and the Office of Network Support.
**Build coherence, shared understanding of the work.**

Chicago Public Schools should continue to invest in structures and systems for coherence building across three sets of staff. The first key group consists of the academic chiefs (the heads of teaching and learning, college and career, early childhood, diverse learners, and language and cultural education). This team, reporting to the Chief Education Officer, is the engine of instructional improvement; coherence between these offices is critical to providing high-quality, responsive school support. The team should continue to use the lens of targeted universalism to ensure all students reach the aspirational goals of the district.

Second, district leaders should pay particular attention to the relationship between program offices, such as T&L, and the network chiefs. District leaders must ensure clear roles and responsibilities for each office. I often heard that T&L is tasked with setting an academic vision and associated practices while the networks execute and support schools against that vision. Both offices need to be comfortable with and invested in those roles. Most importantly, stronger relationships are needed, built through purposeful collaboration and time spent together supporting school needs. Staff members told me that the relationship between program offices and the networks has improved in recent years. CPS must make a sustained effort to nurture and grow this critical partnership.

Finally, I recommend the district further invest in the relationship between central office staff and school staff by investing in collaborative structures that promote practice sharing and collective problem solving. Currently, expertise is distributed throughout the system. This expertise could be better surfaced and shared via collaborative opportunities such as structured school visits, classroom learning walks, observations, professional learning communities, peer-to-peer networks, and cohort-based experiences. These
deliberate collaboration models would further break down silos, build capacity, strengthen relationships, and foster innovation and improvement.

Organize to execute and organize to learn.

Chicago Public Schools should continue to focus on “the right mixture of pressure and support” (Fullan & Quinn, 2016, p. 2.). The district’s focus on execution is laudable and likely contributes to its recent progress and improvement. However, many of the remaining challenges, such as ensuring an equitable education for all students, may not respond as readily to technical, execution-focused solutions; these adaptive challenges will require creative problem solving and rapid learning. The district is currently undergoing a revision of its School Quality Rating Policy (SQRP), a process that will be an important forum for conversations about district goals, priorities, and measures. If well executed, this process can increase coherence, internal accountability, shared commitment, and aligned supports. A revised SQRP could incentivize school communities, through a balance of benchmark and growth metrics, to both organize to execute and organize to learn.

Additionally, I recommend that Chicago Public Schools invest in the professional learning of central office leaders. For instance, the incoming deputy chief of teaching and learning could be tasked with developing a professional learning and team development series for office directors. The district might also consider contracting with an executive coaching firm to provide group and individual leadership coaching sessions focused on prioritization, coherence, and collaboration.

Cultivate joy and celebrate success.
Finally, this pandemic year was tough. Chicago Public Schools should continue to find ways to cultivate joy and celebrate successes. The district should find ways to connect staff – particularly central office staff – to teacher and student success, celebrate achievements, and recognize hard work, dedication, and innovation.
Implications for Sector

After reflecting on my residency project, I drew several implications for the education sector. I encourage more robust public discussion of the goals of education, additional focus on the strategic planning process, and further research on the role of the central office in improving student outcomes.

Foster forums for public discussion of the goals of education

First, my strategic project often made me return to questions about the purpose and goals of public education. As districts attempt to prioritize and sequence workstreams, leaders must grapple with foundational beliefs about what matters most when it comes to educating young people. The sector needs more robust channels for having important goal setting conversations with various stakeholders. For example, district leaders might engage the communities in “Hopes and Dreams” conversations that allow the public to express their goals for student learning and an educated citizenry. Moreover, an imaginary budgeting engagement that asks public participants to divide $100 between various school investments could spur discussions about tradeoffs and prioritization. Further clarity around a community’s goals for education would aid the development of focused and coherent district strategic plans and priority workstreams.

Use Planning Processes to Build Coherence; A Plan is just a Plan!

Second, during an early strategy planning meeting I shared a quote from Dwight Eisenhower: “Plans are nothing. Planning is everything.” In many ways, the education sector often puts too much attention on strategic planning documents and not enough attention on the planning, implementation, and continuous improvement processes that bring these plans to life. The sector needs to harness the power of planning. Coherence, a
shared understanding of the purpose and nature of the work, is built through ongoing work, with any given staff under the given circumstances.

District offices as learning organizations

Third, the sector may arguably be emerging from more than two decades of accountability driven reform. Education leaders need to be careful not to swing the pendulum too far to the other extreme, but the sector needs to balance accountability with support by investing in systems, structures, and policies that promote capacity building alongside systems of accountability. The pandemic recovery presents an opportune time to explore and implement new ways of working together.

Document and research theory of action and practices of strong central offices

Finally, the sector should continue to research best practices in the relationship between central office and school improvement. More work needs to be done to highlight districts that have succeeded in clarifying roles, responsibilities, and theories of action for school improvement. The sector must shift the paradigm that expertise lies only in the central office and instead foster networks of collaboration and support that unlock potential and spur breakthrough growth.
Conclusion

In conclusion, I am humbled and thankful for the opportunity to work alongside the talented, dedicated, thoughtful educators at Chicago Public Schools, especially during this challenging and unprecedented year.

I am excited for the district’s work ahead, work that is at the heart of teaching and learning. Namely, the district’s Curriculum Equity Initiative, an attempt to ensure all students have access to high-quality, culturally responsive curriculum, is an inspiring game changer. The vision for school-based, centrally supported, content-specific professional learning is equally impressive. I also believe deeply in CPS’s schools-driven approach to academic program models. Each of these workstreams seeks to bring meaningful and challenging learning experiences to all CPS students, experiences that are closely tied to their future success in college, career, and life.

Early in my residency, a department director shared, “The moment we are having is powerful. We are headed in the right direction. And I’m grateful to be part of the CPS story.” I, too, am grateful to have been part of that story.
Bibliography


Appendices

Appendix A: Organizational Charts

Chicago Public Schools

Office of Teaching and Learning
Appendix B:

Office of Teaching and Learning Strategic Planning Team Membership

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<th>Position</th>
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<tr>
<td>Executive Director of Arts Education</td>
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<td>Executive Director of Literacy</td>
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<td>Executive Director of Magnets, Gifted, AP, and IB Programs</td>
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<td>Executive Director of Science, Technology, Engineering and Mathematics (STEM)</td>
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<td>Executive Director of Social Science and Civic Engagement</td>
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<td>Director of Cross-Content Initiatives</td>
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<td>Director of Student Assessment</td>
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## Appendix C: Strategic Planning Artifacts

CPS SY21 Continuous Improvement Resources Provided by the CEO’s Office

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<th>CI SY21 Documents &amp; PD Handouts</th>
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<td>SLT Deck</td>
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### Resources

- CI for Finance Managers
- ERS Resource Equity Article
- Targeted Universalism Video by John A. Powell
- Co-planning deck - November
- Worksheet: Connecting Your Work to Student Outcomes
- Worksheet: Vision to Progress Team Breakout Protocol
- Worksheet: Setting up CI for SY21
- SLT Deck
- T&L CI Plan Screenshot <Google Sheets>
Sample Slides from a T&L CI Presentation <Google Slides>

Priority 1: Grade-level, Standards-Aligned Instruction

Section 2: Overview of CI Plan Priorities

Department Project Tracker Screenshot <Google Sheets>