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Citation
Short, Kathryn. 2018. A Marathon at a Sprinter's Pace: Improving Retention in a Turnaround Environment Through Manager Development. Doctoral dissertation, Harvard Graduate School of Education.

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A Marathon at a Sprinter's Pace:
Improving Retention in a Turnaround Environment through Manager Development

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

Submitted by

Kathryn Short

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

April 2018

Dedication

To the students of Louise A. Spencer Elementary School in Newark, New Jersey. You taught me more than you can ever know, and forever changed the trajectory of my life.
Thank you.

To the 14,500 students served by Partnership schools. You reminded me of my why when I started to get lost in the what.
Thank you.

Acknowledgements

This work would not have been possible without the contributions of so many people in so many places.

At Harvard, thank you to…

- Marty West and Deb Helsing for your incredible encouragement and thought partnership both on my committee and throughout my time at HGSE. Your support has been foundational in my development as a student and as a leader.
- Liz City for creating and leading this program. When I think of the kind of leader I want to be, I think of your grace, poise, and learner's mindset.
- Marshall Ganz for being one of the great thought leaders in my mind before I ever met you, and one of the great mentors in my life now that I have.
- Bob Goodman for never judging my tears, always pushing my thinking, and sometimes calling out my crazy. I hope to someday be half the coach to someone else that you have been to me.
- All of the EdLD faculty and leadership coaches, each of whom expanded my thinking and shaped my perspective in unique ways. I consider myself spoiled rotten to have learned from all of you.

At the Partnership for LA Schools, thank you to…

- Shauwea Hamilton. Not only were you instrumental in the shaping of this capstone, you have been instrumental in the shaping of my journey as a growing leader. You model authentic, people-centered leadership and I feel lucky to get to watch you in action.
- Joan Sullivan for always encouraging me to keep my eyes centered on our students and our mission. You kept me grounded in purpose, and redirected me with clarity and kindness when I began to wander.
- The Ops team for being an amazing home base team – you're the best honey badgers around.
- Viviann, Virginia, Tanya, Julija, Rachel, Willa, Felix, Beth, Diana, and everyone else at the Partnership for planning with me, pushing with me, and reminding me not to take myself too seriously. You are all equity warriors, and I feel honored to work alongside you.

In my cohort, thank you to…

- The Mighty C6 as a whole. Our story of us has been a messy, complicated, beautiful one, and I'm excited for the story of our collective impact still to come.
- Orpheus Consulting, LLC. Aeran, Anthony, Elizabeth, and Jordy, I could not have made it through year one without you, let alone residency. Let me tell you something: I love you all.
- My amazing pod, and in particular my amazing peer coach Jeff Curley. Our check-ins warmed my heart and reminded me of my best self. I am so grateful to each of you.
- The We Call It Leadership thread members, who kept me motivated with articles and texts that alternately made me proud, angry, fired up, thrilled, or some combination.
- My Havana-traveling sisters, Kate and Miho – can't wait for our next big adventure.

- The many members of the EdLD network who listened to my vents, answered the most random of text questions, and reminded me that I would, in fact, graduate at some point.

Right here at home, thank you to…

- My parents. You taught me from day one to push for what is right, and to value every chance for learning that I could get my hands on. This capstone only exists because of what you taught me, so in a sense it's yours. Hope you're ready for defense. Love you both.
- Aidan and Diana for always encouraging me to put down my computer and dance instead.
- Rosie and Jessie for reminding me to laugh and let go at least once a week. Family dinner forever.
- Lara for being my always-best TV watching and travel partner. I am forever grateful for everything you taught me about being a kind, open-minded, and loving person.
- Ama Nyamekye for being my first great boss, and a lifelong friend and mentor. I never would have applied to EdLD without your mentorship, and never would have gotten in without the amazing opportunities you provided to me to lead when I was wildly underqualified.
- My broader tribe who called, texted, emailed, sent owls from all around the world to check on me and my doctor status. I hope I made you proud, friends.
- Raphael for ensuring regular writing breaks and delicious food were always available. Thank you for the butterflies and the dancing. I love you.
- Austen Peanut Butter Cupcake for your precious face, wagging tail, and insistence on snuggles. You remind me every day to be passionate, grateful, and joyful.

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Abstract

Across all sectors, attracting and retaining talent is a pressing challenge. At the Partnership for Los Angeles Schools, a non-profit working to transform 18 of Los Angeles Unified School District's highest-need schools, the challenge of retention held particular relevance. The pace and urgency of work with high-need schools made turnover both understandable and damaging. An 18.3 percent average turnover rate from 2012-2016 created gaps in institutional knowledge and capacity – turnover meant an exponential increase in intensity for remaining team members. The Partnership identified manager skill as a lever for retention, and tasked me in my residency to create the Leadership Development Series. The Series' goals focused on adaptive leadership skills, self-reflection, and coaching. The structure included 11 whole-group trainings, a peer coaching system, and an observation cycle of manager practice in check-ins. While the Series had positive impacts on overall staff satisfaction ratings and planned tenure, it is unclear if that impact came from changes in manager practice.

Using the Ganz Leadership Practices framework, this paper argues that the Series succeeded because of strong shared relationships and structures, namely in initial relationship-building and peer coaching. However, the Series missed a foundational step in building a shared narrative about the drivers of retention and the management skills needed to improve retention, particularly the value of adaptive leadership skills like self-reflection and self-awareness, which can appear to run counter to the high-urgency work the Partnership undertakes at schools. Without this shared narrative, the ties between the Series and the ultimate goal of retention became abstract, resulting in a valuable professional development experience, but an unclear path to impact on retention goals.

This capstone recommends that the Partnership create a more fertile ground for a focus on adaptive leadership skills, including engaging schools to create a common

understanding of strong management, creating low-risk learning environments to build a culture of self-reflection, and including team retention as a performance goal for managers. For the sector, there are lessons to be learned about the value of creating a coherent narrative for a retention strategy and setting metrics aligned to those narratives.

Introduction

In 2016, non-profits nationwide saw a 19 percent turnover rate for their employees ("The 2016 Nonprofit Employment Practices Survey," 2016). In other words, around one in five jobs at non-profits had to be re-filled over the course of 2016, draining the financial and human resources of organizations as they fight for talent, re-train new team members, and slow down services to accommodate new learning curves. For non-profits that serve public schools, where relationships and collaboration are key, high rates of turnover can create a vicious cycle of lost institutional knowledge and constant reinvestment in the relationship-building and training needed for collaboration. This problem gets even more complex with the added layer of turnover in the schools themselves. One report from 2017 found that teacher turnover is around 16 percent across all schools and 50 percent higher in Title I schools, where many non-profit partners are focused (Carver-Thomas & Darling-Hammond, 2017). As a result, in a partnership between a non-profit and local school district, it is entirely possible that one or both parties will consistently be allocating a significant portion of their resources to replacing and retraining their own people, which both limits the absolute resources available for other work and the institutional knowledge available for collaboration.

It is with this larger problem of practice in mind that I entered my residency at the Partnership for Los Angeles Schools ("The Partnership"), an in-district turnaround non-profit that serves 18 Los Angeles Unified (LAUSD) schools across south and east LA. With an average home office staff turnover rate of 18.3 percent over the last four years (see Table 1), and the teacher turnover rate within the schools at approximately 15 percent (C. Brown, personal communication, November 2017), turnover is felt acutely by all members of the team, particularly those who work directly with school staff. One principal reported in an informal conversation that he has stopped getting to know everyone at the Partnership because "who knows how long they will be there" (personal communication, November 2017). The attrition is also felt by the home office team, on both a cultural and practical level. In the most recent organizational culture survey, multiple written comments referred to staff turnover as a problem, and one person wrote, "the amount of turnover is unsettling" (personal communication, January 2018). On a practical level, the Partnership team is small enough that each departure represents an entire stream of work that has to be reallocated to someone else or dropped – often a level of schools that must be redistributed, or an element of operations that now has no representative. The need was pressing enough to the Partnership that, in 2016, the team formed "organizational culture committees" to do a deep dive into the causes of turnover. While each committee had its own topic, such as prioritization or sustainable work habits, they all had the task of figuring out how that topic influenced retention, and how the Partnership could improve its practices. These committees were underway during my initial conversations with the Partnership leading up to my residency, and organizational leaders explained my arrival to the committees as the Partnership's investment in further exploring organizational sustainability and staff retention.

As such, the problem of practice explored in my residency was how a non-profit, with limited resources and capacity, might increase staff retention without sacrificing the strong drive for results required to transform schools.

Table 1

Partnership Home Office Staff Turnover Rates

FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17
27.50%	19.83%	11.86%	14.06%

Partnership for Los Angeles Schools internal data

Organizational Context

The Partnership works with LAUSD in transforming schools in Boyle Heights, South LA, and Watts. As school partners, they take ownership of principal selection, evaluation, and retention, as well as teacher professional development for math and English Language Arts (ELA) and operational supports. The Partnership was founded in 2007 by then-Mayor Antonio Villaraigosa after his unsuccessful bid to take control of the entire district. The Partnership began with 10 schools under its control, all of which were considered among the "hardest to staff" schools in the district. Over time, eight additional schools have come under the Partnership Memorandum of Understanding (MOU) through a variety of mechanisms, including parent trigger, staff vote, and district request. All of the 18 schools' employees are part of the district's collective bargaining units, and the schools are subject to any LAUSD School Board resolutions that apply to them.

The Partnership's mission statement, as stated on its website, is "to transform schools and revolutionize school systems to empower all students with a high-quality education." It is worth noting that the 18 schools the Partnership serves are a tiny portion of the nation's second largest school district, which comprises 1,300 different schools and adult learning centers, including charter, magnet, early childhood, and other non-traditional programs. The Partnership takes pride, however, in ensuring that any and all innovations undertaken in their schools are done with the same constraints and considerations as would be the case in a traditional school, with the belief that replication and scale require acknowledging the systems around schools that shape them, and so the Partnership's schools must operate within that same system.

The non-profit home office is made up of 47 employees. The 21 members of the Academic Team, overseen by a Chief Academic Officer (CAO), spend the majority of their time in schools, supporting principals, department leads, instructional coaches, and other leaders on campus to improve instruction. The 14 members of the External Relations Team, overseen by a Chief External Relations Officer (CERO), include the five members of the Family and Community Engagement (FACE) team, who work with the Restorative Communities team to support all family engagement efforts and wraparound services at the school sites, as well as staff who work on media relations, policy work, and development. The 10 members of the Operations Team, overseen by a Chief Strategy and Operations Officer (CSOO) include talent, data and impact, finance and budget, and legal counsel, all of which support operations for both the home office and school sites (see Appendix A: Org Chart). It is worth noting that the previous CSOO departed in October 2017 due to a family emergency, and from October onward the organization's Senior Director of Operations and General Counsel served as the interim CSOO.

Table 2

Staff Demographic Data as of March 2018

Position	**Caucasian**		**African American**		**Asian, Pacific Islander**		**Latino/a**		**Other**	
	#	%	#	%	#	%	#	%	#	%
Organization Totals	20	43%	10	21%	3	6%	13	28%	1	2%
Has 1+ home office direct report	13	65%	2	10%	2	10%	3	15%	0	0
Associate/ Senior Associate	2	25%	1	13%	0	0	4	50%	1	13 %
Manager/ Senior Manager	4	31%	2	15%	0	0	7	54%	0	0
Coordinator/ Senior Coordinator	3	33%	5	55%	1	11%	0	0	0	0
Director*	5	63%	0	0	1	13%	2	25%	0	0
Senior Director*	3	60%	1	20%	1	20%	0	0	0	0
C-Level Executive	3	75%	1	25%	0	0	0	0	0	0

**Note*. Director and Senior Director positions are considered separately because these roles are more distinct in terms of range of duties and expectations than any of the other "senior" roles

The Partnership home office team is racially diverse. Of the 47 staff members, 57% percent identify as people of color, which is close to on par with the demographics of Los Angeles County more broadly (US Census Bureau, 2017). However, the majority of people in management positions are white (see Table 2). In addition, the students the Partnership serves are almost 100 percent black and Latino (LAUSD School Directory, 2018), so the contrast between the makeup of home office staff and the students they serve is stark.

For a problem of practice focused on overall staff retention and sustainability, three areas of context require a more detailed examination to help frame the strategic project: mission and employee expectations, talent systems, and financial assets and constraints.

Mission and employee expectations. The Partnership's ambitious mission is translated into specific goals for 2020 laid out in the Partnership's strategic plan, including doubling rates of ELA and math proficiency at each school in the network, ensuring $6 million in reserves for the organization, and achieving 22 "systems change" wins that impact districtwide practice (personal communication, November 15, 2017). These goals are repeated at the beginning of each monthly all-staff meeting and tracked in a shared spreadsheet that is updated weekly and reported on in the staff meeting, as well as in quarterly board meetings. In other words, the goals are not discussed as lofty moon-shot goals, but rather as the real work of the organization.

In an organizational culture survey that is distributed biannually, 98 percent of Partnership employees agreed or strongly agreed that "The mission of the Partnership makes me feel my job is important" (see Appendix B: Partnership Staff Survey results). In initial one-on-one interviews with 30 staff members, 28 were able to name specific and personal ways in which the mission of the Partnership mattered to them, and all 30 were able to articulate the path between their strand of work and the transformational mission at schools (personal communications, 2017).

This mission-driven culture also results in a strong desire to see the impact of the work in action as often as possible. As a result, office traditions also show the premium placed on being in schools. For the first day of school, all 47 Partnership staff members, including the CEO, deploy to the 18 schools to support in any way needed (personal communication, August 1, 2017).

Throughout the year, principal supervisors in the office (senior directors on the Academic Team) (see Appendix A: Org chart) send out requests from principals for Partnership staff to come out to schools for various needs, and the senior directors report that those requests consistently get filled quickly (R. Bonkovsky, personal communication, November 5, 2017).

While the school-facing focus and mission have resulted in tremendous growth in achievement at school sites, they have also meant a prioritization of school sites over home office investments. For example, the monthly all-staff meeting start times are determined by the most convenient time for getting back from and returning to schools, and multiple staff members reported in initial interviews that they felt they were only "allowed to say no to home office people" (personal communication, October 2017).

The Partnership's intensive mission-driven culture does create a challenge for sustainability, as it also means that employees feel responsible to each of the 18 schools and find it difficult to draw boundaries around what work they are able to take on. As a result, many employees report that they often feel as though they are approaching burnout. One coordinator (a teacher coach on the Academic Team) explained, "We say it's a marathon, but we're expected to run it at a sprint pace" (F. Jones, personal communication, October 10, 2017).

Talent systems at the Partnership. The bulk of talent systems sit under the Director of Talent Management, who supervises one Manager of Talent focused primarily on capacity-building for principal hiring, and one Associate of Talent and Operations, who splits time between teacher hiring and school operations support. In an overarching sense, capacity is a key constraint on the organization's home office talent systems: they are essentially being developed, maintained, and implemented by one person who is also responsible for overseeing hiring of school-level administrators, a long and extremely selective process.

On the home office front, the Partnership's hiring process is also rigorous and long. On average, employees go through three rounds of interviews and often take more than four or five months to go from initial application to hiring (C. Brown, personal communication, September 2, 2017). While the CEO retains final decision-making authority, it is not uncommon for applicants to be turned down simply because of "ambivalence" from a few of the interviewers across the organization. The knowable results of this process are two-fold. First, each and every hire has a wide range of champions in the organization, due to the time and investment placed into finding and screening the person. Second, the length and depth of the hiring process creates a perception in the organization that the process is selective and difficult, and that employees of the Partnership are unique relative to other education sector employees. On the June 2017 organizational culture survey, only 69 percent of employees agreed or strongly agreed that they would recommend the Partnership as a great place to work (see Appendix B). In the written comments, five individuals clarified that their disagreement stemmed from their belief that the Partnership was simply not a good fit for most people, or that it requires a particularly high level of skill and commitment to be successful in the organization.

The time-intensive hiring process has a third goal: hired candidates who are high-quality and mission-aligned. However, the measures of "high-quality" are difficult to calibrate, and potential measures are not consistently tracked. For example, the Partnership does not currently have a centralized system to keep track of data such as the average years of experience of employees, nor average results on its performance management system. Overall, then, it is difficult to measure whether or not this intended goal around quality of candidates is being met. In addition, because many of the roles within the organization do not have a parallel within the district, it is difficult to know what the correct comparison point would be in terms of relative "quality" of the hires. That said, it is clear that hired candidates are highly mission aligned. As mentioned, the January 2018 organizational culture survey showed that 98% of Partnership employees agreed or strongly agreed that the mission of the Partnership inspired them.

The talent team also oversees the Partnership's performance management system for its home office staff, which consists of annual goal-setting in three categories: individual annual deliverables (the intended work and impact in service of the mission), stakeholder satisfaction (on an annual Partnership Feedback Survey distributed to school leaders and staff), and job competencies (skill-based growth goals grounded in a common set of core competencies and accompanying rubric). Employees check in three times throughout the course of the year, and the ratings on the three areas (deliverables, stakeholder satisfaction, and job competencies) are then weighted, combined with an overall network rating based on Partnership-wide goals, and calculated into an overall rating from 1.0 (ineffective) to 4.0 (highly effective). These ratings are used as a factor in determining pay increases and promotions, but only in conjunction with a broader set of conversations and considerations. The ratings across the organization are not captured in a single document, but both the Director of Talent and the CEO, both of whom have access to the full set of ratings, report a tight range between 2.5 and 3, with very few individuals on either tail of the rating scale. The reasons behind the clustering are likely complex and multi-faceted, but it almost certainly in part relates to manager comfort in using the system. The CEO informed me in an early conversation that the performance management system was approximately two years old, and that many managers were still adjusting to the outcome- and goal-based approach to evaluation. "We made a lot of progress with this new system, but we still have a long way to go – I would want to have much more faith in the ratings of our managers before I put any real decisions on [the system's] back" (J. Sullivan, personal communication, August 2017).

The home office talent team's limited capacity is also reflected in a lack of systems for tracking qualitative hiring and retention data for the home office. For example, exit interviews are captured on a spreadsheet that has a wealth of data in the form of interview notes, but no categorization that allows trends to be noted across teams or levels as "reasons for leaving." And some exit interviews are missing altogether, as the Director of Talent happened to be sick or out of the office during the time of an individual's departure. In addition, the Partnership's application platform gathers initial applications, but subsequent rounds of interviews are tracked at the discretion and according to the current capacity of the home office talent team via a mix of Google Docs and Word documents. These disparate systems do not lend themselves to a broader analysis of how and why candidates do or do not choose the Partnership, and vice versa.

Financial assets and constraints. The Partnership's 2017-18 budget as reported to its board was approximately $11 million (see Appendix C: Partnership budget). One hundred percent of the annual budget comes through fundraising (individuals and foundations), and the development team in charge of that goal is made up of three individuals in addition to the CEO and CERO. Therefore, any additions to the budget directly impact the workload of that small development team, and would potentially have implications for resizing that team to find new sources of dollars. Given that the CEO and board have set a budget that is matched to the Partnership's current team size and that philanthropic dollars are not infinite, financial resources for home office staffing and support at the Partnership are inherently limited. Importantly, the Partnership also serves some of the most under-resourced schools in LAUSD, and many home office staff members fear that they will lose credibility and trust with their schools if they "look" too well-resourced. For example, in a focus group on a potential expansion of benefits for home office staff, one coordinator expressed concerns over what it would look like for school staff to visit the home office if some of the proposed perks were in place: "I wouldn't want our teacher leaders to come here and we have fancy new TVs in the conference room, and meanwhile they can't get copy paper" (personal communication, September 2017). In other words, the Partnership's ability to increase pay, expand positions, or provide other kinds of "perks" is limited in an absolute sense by the need to fundraise every dollar, and in a relative sense by the deep relationship with schools where perks that are normal in the private sector may be seen as inappropriate.

Of the $11 million budget, approximately 60 percent goes to employee salaries and benefits, a much larger percentage than was allocated for salaries early in the Partnership's history. In 2007, only 28 percent of the budget was spent on salaries and benefits, with the rest of the dollars going directly to school site supports (A. Nagar, personal communication, October 1, 2017). The Partnership shifted its model to focus more heavily on capacity-building of school sites, rather than direct service provision, with the belief that this was the only way to scale its work effectively (J. Sullivan, personal communication, October 2017). Thus, the organization began investing heavily in home office staff. However, given the need to fundraise the budget each year, and pushes from both funders and school site stakeholders to funnel every available dollar directly to school sites, the Partnership must be extremely judicious about creating new positions or pathways. In terms of the current structure, out of 47 employees, 20 manage at least one person, and 13 of those managers manage two or fewer direct reports at the home office. The structure ensures that all managers are, in the language used by the Partnership, "working managers" who both supervise employees and carry on their own streams of work, given the relatively low workload in management and the small size of teams responsible for functional areas overall. Practically speaking, most people at the Partnership only have the opportunity for upward advancement if their manager leaves or someone further up in the hierarchy moves.

In summary, the Partnership is a relatively small and diverse team comprising three unique sub-teams, each with its own culture, opportunities, and challenges. The Partnership has gone through many changes in the last few years, including increasing its expenditures on salaries and benefits, and increasing the number of schools it serves. As it has focused more on capacity building in support of scalability and sustainability of its work, it has retained a direct service provision mindset, resulting in a strong connection to schools and a challenge in continuing to serve the number of schools with the same level of support. It has moved out of its start-up phase and has begun to explore ways to make its staff and its practices more sustainable for the long-term.

With all of this context in mind, the problem of practice the Partnership faced at the outset of my residency was clear: how does a non-profit, faced with intense and fast-paced work, limited resources to invest in a human capital strategy, and an ambitious team, improve employee retention without losing its focus on mission?

Review of Knowledge for Action (RKA)

As is common in non-profits and schools, attrition at the Partnership is often described as a kind of side effect – an outcome over which we have little control, given the work we set out to do. As one team member explained in an interview, "The Partnership is a two-year kind of place" (personal communication, September 7, 2017). Creating an organization in which people stay well past the two-year mark, as the Partnership wishes to do, required thinking of attrition not as a side effect, but as a key factor influencing the collective work that cannot be disentangled from the larger mission for students and families.

So the overarching question explored here will be: How do we improve employee retention in a nonprofit with ambitious and challenging goals? While the literature on this broad question is expansive, in the context of a nonprofit serving public schools it breaks naturally into three key sub-questions:

1. **What drives retention and attrition?** What does the literature say about the key drivers of retention and attrition in non-profits and school districts that are in a state of turnaround?

The Partnership operates as both a traditional non-profit and as a quasi-school district central office, both providing direct school support and supervision as well as broader capacity building and strategic planning for the schools and for the home office itself. Thus, it was important to look at drivers of retention and attrition in both settings to seek out areas of commonality and difference.

2. **What is "good management" in turnaround environments and diverse teams?** If a key driver of retention is management practices, what does the literature say about best practices in management? Are there best practices unique to turnaround environments? What do we know about management in diverse teams?

The literature on management approaches and practices is wide and deep. In determining how to winnow down to the most applicable frames, the context for managers at the Partnership proved to be particularly important. I focused on what the literature says about management in *turnaround environments*, which describes well the intensity and nature of the work undertaken by Partnership employees. In addition, of the 20 managers within the Partnership, 13 of them manage someone of a different racial background. For that reason, I also focused on what the literature says about managing *diverse teams*.

3. **How do adults learn and grow?** If the answers to the first two questions suggest the need to change management practices, what does the literature say about how adults learn, grow, and change? What conditions are necessary for learning?

Given the new skills required by the first two questions, it was important to learn how adults, particularly adults who enter with deep existing expertise, shift mindsets and thereby shift practice.

What Drives Retention and Attrition?

Across various sectors, nations, and time periods, the research on employee retention is relatively unified in its conclusions. In broad strokes, employees stay in or leave organizations because of work alignment, pay and working conditions, peer relationships, and management.

Work alignment. By far the most foundational driver of employee retention is clarity of, and alignment with, one's work and role. In other words, employees want to understand the big picture of *why* their work matters, as well as the practicalities of *what* their particular role entails. One synthesis of employee motivation theory described these factors as "effort" and "responsibilities" – employees need to see that the effort they put in leads to an outcome that matters to them, and they need to feel clear about what kinds of effort they are supposed to be putting in (Ramlall, 2004).

Particularly in nonprofits, mission alignment can be a driving force that can even override the more practical and pressing considerations of working conditions like pay and career advancement (Brown & Yoshioka, 2003). When employees feel aligned to the overall mission of the organization, they are more likely to seek out connections between their own work stream and the mission, rather than needing those bridges built for them by supervisors. In interviews with employees, Brown and Yoshioka (2003) learned that mission alignment was a key reason for organizational commitment, even when resources were constrained and more material rewards were not possible.

But as noted above, mission alignment is only half of the puzzle. Employees must also feel aligned with their own role, both in terms of its clarity and its fit. Gallup developed the widely used "Gallup Q12" measures of "employee engagement," a measure validated and normed across thousands of employees in a variety of sectors as a predictor of both productivity and retention. Gallup explains, "Employees who strongly agree that their job description aligns with the work they are asked to do are 2.5 times more likely than other employees to be engaged" ("State of the American Workplace, 2017, p. 100). One study of nonprofit employees across a variety of sectors found that almost half (46 percent) cited "work content" as the most important factor in their decision around whether or not to stay at their organization. "Work content" in the study included "[v]ariety, challenge...meaningfulness...impact...goals, [and] objectives" among other factors (Knoepke, 2015, p. 5). Similarly, Gallup found that "the opportunity to use [one's] strengths every day" is a top factor for why employees change companies ("State of the American Workplace, 2017, p. 99). When employees feel as though they are a good fit for the organization, and a good fit for their role, the Gallup research shows, they create a virtuous cycle of engagement in which their positive feelings about the job and organization drive them to seek ways to grow in their role, which then makes them even better at their job and more committed to the organization, which then furthers their desire to stay and grow, and so on.

Pay and Working Conditions. Most of the research on retention in nonprofits in particular finds that while mission alignment is important, pay and other working conditions are pressing factors that must be considered. Like workers in other sectors, nonprofit workers have family and financial commitments they must consider in addition to the moral fulfillment of their work. One study of nonprofit healthcare workers found that dissatisfaction with pay and career advancement opportunities actually overrode mission alignment when the dissatisfaction was severe enough (Kim & Lee, 2007). Another study of nonprofit employees in Nevada found that while pay was not cited as a reason for turnover in their sample, dissatisfaction with other working conditions (lack of boundaries or unrealistic hours) were by far the top-cited factor (Armstrong et al., 2009).

Peer Relationships. In the Gallup Q12, two of the foundational questions used to measure "employee engagement" are "My colleagues are committed to doing quality work" and "I have a best friend at work." As Gallup explains, "Early research on employee engagement…revealed a unique social pattern among employees in top-performing teams. When employees possess a deep sense of affiliation with their team members, they are driven to take positive actions that benefit the business — actions they may not otherwise even consider" ("State of the American Workplace, 2017, p. 118). Other studies confirm this finding of the importance of a peer network in the workplace. In *Motivating Strategies for Performance and Productivity: A Guide to Human Resource Development* (1989), the authors use the Maslow's hierarchy of needs framework to demonstrate that affiliation in the workplace is a fundamental need that must be satisfied in order for other, higher-order needs (growth or challenge, for example) to be addressed.

But as the first Gallup question suggests, it is not simply about having a "friend" – peers must also be trustworthy and committed in order to make the peer network a positive one. In one meta-analysis of co-worker effects on employee performance, the authors find that while both strong and weak employees can offer affective support (emotional and psychological), strong employees offer additional instrumental support (job and task-related) that can improve role clarity, growth on the job, and motivation in completing tasks, which are all key factors, as noted above, in employee retention (Chiaburu & Harrison, 2012).

This finding was also replicated in "The Irreplaceables," a study by TNTP on retaining high-performing teachers in urban school districts. The authors explain, "In three out of the four districts we studied, retention rates were higher at schools where teachers reported a low tolerance for poor performance. And Irreplaceables who believe their colleagues are mostly effective told us they would remain at their schools longer" ("The Irreplaceables," 2012, p. 28). The authors' hypothesis to explain this connection was the same network effect of colleagues described above. When teachers trusted that their students would be passed from their class into another high-quality classroom, the impact of their own work felt clearer and they could create a community of practice with one another, both of which drove higher retention.

Management. As the cliché goes, employees "join organizations and leave managers." The data bears out this claim. A 2015 Gallup study found that 50 percent of employees who had left their jobs reported their manager as the chief cause of their departure. The same study found that 70 percent of variance in employee engagement (productivity and performance) could be attributed to manager behavior (Beck & Harter, 2015). Managers, it could be argued from this data, are the single most important factor in the retention decisions of employees.

Managers' central role in employee retention also makes intuitive sense, given the role managers play in the factors influencing retention mentioned above. Managers often help hire, which influences fit and alignment, as well as determine job scope. Managers then play a major role in setting working conditions, helping employees feel comfortable prioritizing and de-prioritizing work as needed, and setting healthy boundaries between work and life. And lastly, managers can help set up systems for collaboration and peer networks, particularly when they are managing teams, and help ensure teams are made up of effective employees.

Managers also play a key role in the retention of teachers in high-need schools. In a 2009 study of teacher attrition in New York City schools, the authors found that teacher relationships to administrators proved one of the most predictive factors of retention decisions (Boyd et al., 2010). Even in environments where managers have little influence over the content of the work or the pay, as is the case in public schools, management practices in creating culture, coaching and feedback, and encouraging collaboration can prove instrumental in building organizational commitment.

What is "Good Management" in Turnaround Environments and Diverse Teams?

Turnaround leadership. Barker and Duhaime define "turnaround" as "when a firm undergoes a survival threatening performance decline over a period of years but is able to reverse the performance decline, end the threat to firm survival and achieve sustained profitability" (Barker & Duhaime, 1997, p. 13). Research has not discovered a clear roadmap for successful leadership in turnaround environments but rather a set of "core tensions" leaders must hold as they navigate such environments. A study of four companies in turnaround examined these tensions and laid them out as follows:

- Stability and change: turnarounds require both changes in leadership practice and stability in vision;
- Ownership and distance: turnarounds require both owning the problems that necessitated the turnaround and establishing distance from them;
- Urgency and calm: turnarounds require both provoking urgent action and reassurance that the organization is not in chaos;

- Control and autonomy: turnarounds require both taking swift and clear control in the right areas, and building buy-in, consensus, and autonomy for team members in others;
- Investment and cuts: turnarounds require both investing for future growth and being ruthlessly efficient in cutting what is not working; and
- Long-term and short-term focus: turnarounds require both a focus on long-term goals and short-term needs (O'Kane & Cunningham, 2014).

These tensions are echoed in studies of turnaround leaders in school settings. One such study of turnaround leaders in Ontario schools found that the requirements of leadership throughout the turnaround process varied over time and across contexts, but centered on building vision and setting direction, developing one's people, redesigning structures and systems, and managing the teaching and learning program (Leithwood & Strauss, 2008). Within each of these leadership practices, the authors explore the tensions mentioned above. For example, in building vision, turnaround school leaders must simultaneously be clear and direct about their own vision *and* build buy-in from the team through getting input and ceding some control in how the vision is executed.

Similarly, a paper from the University of Virginia and Public Impact on turnaround leadership found that two key competencies were needed for success:

- "Achievement," defined as "the drive and actions to set challenging goals and reach a high standard of performance."
- "Impact and influence," defined as "acting with the purpose of affecting the perceptions, thinking and actions of others" (Steiner & Hassel, 2011).

Again, in describing the manifestations of these competencies, the authors highlight the core tensions described above. For example, "achievement" requires instilling both a sense of urgency in changing practice to get results *and* faith in teachers that they are capable of the change required.

While neither of these papers explicitly mention O'Kane and Cunningham's core tensions as a reference, both end up reaching the same conclusion: turnaround leadership requires a delicate balancing act that is difficult to navigate and achieve.

Diverse teams. The literature on managing a diverse team is less developed, and largely focuses on either international contexts, or on diverse teams in the sense of thought process and personality preferences, rather than race or class. However, the literature that does exist centers on two themes: the value of naming diversity and the role of self-awareness in management. First, research suggests that the value we know diverse teams provide to problem-solving can only be harnessed if that diversity is explicitly highlighted. One study of diverse R&D teams found that in teams where diversity was regularly discussed and featured, team members were more engaged, effective, and trusting of one another (Kearney & Gebert, 2009). In *Flex: The New Playbook for Managing Across Difference*, authors Jane Hyun and Audrey S. Lee begin by emphasizing the role of discussing diversity in order to leverage it. They explain, "Though born of a well-intentioned desire to avoid making anyone feel bad or somehow inferior, the fix – to avoid any recognition, discussion, or even admission of difference – doesn't really fix much at all" (p. 11). Their proposed solution is to name explicitly what they term "the gap" (e.g., gaps in power, age, culture, gender, or other markers of difference) so that all parties are able to grapple with it and make meaning of it together.

In order to accurately name and describe "the gap," managers must be able to see and fluently discuss their own perspectives and biases. They must cultivate greater self-management. Hyun and Lee explain, "Fluent leaders have a good grasp of their own strengths, weaknesses, and preferences" (p. 79). This finding resonates with other literature on high-performing managers more generally. One study of managers across three different industries (airline, pharmaceutical, and technology) found that high-performing managers, as measured by the performance of their teams, were far more likely to have accurate self-assessments of their own management practices in relation to the assessment from their direct reports (Church, 1997). A deep knowledge of oneself and one's own preferences are vital in managing others.

How do Adults Learn and Grow to Face Adaptive Challenges?

Overall, both managing in challenging turnaround environments and managing across lines of difference require not just learning new information and skills, but actually engaging in new kinds of self-awareness and self-reflection. Ronald Heifetz and Marty Linsky in their book *Leadership on the Line* distinguish between these two kinds of learning as what is required for "technical problems" versus "adaptive challenges" (2002). They explain,

> "Every day, people have problems for which they do, in fact, have the necessary know-how and procedures. We call these technical problems. But there is a whole host of problems that are not amenable to authoritative expertise or standard operating procedures. They cannot be solved by someone who provides answers from on high. We call these adaptive challenges because they require experiments, new discoveries, and adjustments from numerous places in the organization or community" (p. 13).

The distinction between the technical knowledge and the more adaptive leadership skills required of managers must then also drive the kind of learning required. In other words, if managers need to learn new mindsets and patterns of behavior to help impact employee satisfaction and retention, it is also important to understand what conditions enable them to receive feedback, change practice, and learn new ways of thinking and behaving.

Across most of the research on change management, the conclusion on learning and change is clear: it is difficult. In fact, most research estimates that 60-70 percent of change efforts fail (Beer & Nohira, 2000). In *Leading Change: Why Transformation Efforts Fail*, John Kotter describes eight common errors that most often undermine organizational change, ranging from not creating enough urgency to failing to remove key barriers to that change (Kotter, 1995). He posits that the role of leaders in a moment of transformation is to create and hold up a clear vision for the future and ensure that people have a clear path to success. However, Robert Kegan and Lisa Lahey suggest the role of leadership in addressing adaptive challenges may be even more complex. In "The Real Reason People Won't Change," Kegan and Lahey examine why individual behavior change is so difficult. They write,

> "Our research and analysis have recently led us to a surprising yet deceptively simple conclusion. Resistance to change does not reflect opposition, nor is it merely the rest of inertia. Instead, even as they hold a sincere commitment to change, many people are unwittingly applying productive energy toward a hidden *competing commitment*. The resulting disequilibrium stalls the effort in what looks like resistance but is in fact a kind of personal immunity to change" (Kegan & Lahey, 2011, p.119).

Kegan and Lahey conclude that true learning requires unearthing these competing commitments so they can be examined, challenged, and overcome. For example, a manager who wishes to improve their skills in delegation may uncover a fear that delegating to others will threaten the manager's independence. The manager holds a competing commitment to not being dependent on others. Unless that competing commitment is identified and examined, and eventually modified, the adaptive work on improving delegation skills will be for naught. Kegan and Lahey would describe the growth of this manager as a potential movement from a "socialized" to a "self-authoring" mind, or a mind that can handle greater levels of complexity, self-reflection, and examination, and a more critical examination of one's environment. In thinking about this kind of learning and change at an organizational level, Edgar Schein describes the skills and strengths a leader might need to guide this process of unearthing competing commitments to help let them go, including emotional strength, perception and insight, and familiarity with other, different kinds of cultures (Schein, 1992).

This framework and research resonates with much of the literature on adult learning and behavior change. For example, studies of effective teacher development demonstrate that coaching changes teacher practice much more than workshops on their own (Ferraro, 2000). This finding suggests that similar to what Kegan and Lahey describe, changing practice for teachers requires time to observe practice, unearth old habits and mindsets, and replace them with experiments in new practices. Similarly, a review of adult learning theories highlights that one of the key differences between educating adults and children is the role of previous experience. Adult learners have an incredible resource at their disposal in their wealth of previous experiences in the world, but this resource can also present a challenge in that much of the meaning-making has already been established and may have to be "unlearned" in order to create the new pathways necessary for making adaptive change. One author posits that what he terms "transformational learning" requires raising consciousness about those previous experiences in order to examine them and draw out their value (Merriam, 2004).

Theory of Action

Grounded in this literature, the strategic project I took on at the Partnership for Los Angeles Schools uses the manager as the unit of change for ultimately improving culture and retention within its home office. The theory of action is as follows:

If I…

- Create a series of trainings for managers that promote self-reflection, a coaching mindset, and high-impact best practices for forming relationships with teams;
- Create structures and supports for a peer coaching system that will allow managers to receive regular support in questioning their own assumptions and improving management practice;
- Create structures and supports for regular observation and feedback protocols to ensure alignment across teams and sub-teams in management practices during team interactions (check-ins and meetings); and
- Continuously connect the management development work back to the mission in schools

Then…

- Managers will have a space for their own growth and development;
- Managers at the Partnership will gain skills and prioritize self-reflection and self-awareness, particularly in managing diverse teams;
- Managers at the Partnership will see their work of managing people as equally important to the work in schools; and
- Managers at the Partnership will develop a common language and foundational set of best practices around management that will allow for more calibration across teams and sub-teams

Which will in turn…

- Improve retention among managers themselves, who are experiencing opportunities for growth and new challenges;
- Ensure that managers at the Partnership will be able to develop and retain their people;

- Ensure that all employees at the Partnership experience opportunities for growth on a regular basis in their day-to-day work;
- Ensure that when turnover does occur, manager focus can be on developing those team members, allowing them to acclimate to new roles more quickly; and
- Improve employee retention, resulting in more stability for the Partnership's school leaders and teachers and increasing their trajectory of growth over time.

Strategic Project Description

Project Origins

The "organizational culture committees" the Partnership established in 2016 and tasked with developing systems, structures, and protocols focused on improving key drivers of sustainability led to and informed my residency and strategic project. The four focus areas identified in that prior effort were prioritization, strengths-based leadership, resource management, and sustainable work habits. Across all four committees, a common theme emerged around the role of managers in promoting each driver. At its conclusion, all four committees agreed that the focus in the strategic plan for the coming year needed to be on supporting managers in their own practice, with the theory that managers would then be able to better implement the other practices identified across the four committees.

Given this priority, the CEO, CERO, and I together determined that my strategic project would be focused on a manager development training curriculum and support system, through the lens of race, class, and privilege. Our hope was that this series of trainings would equip managers with the tools, mindsets, and expertise needed to make routines that already exist (check-ins, team and sub-team meetings, the evaluation process) into developmental opportunities for employees, and transformational opportunities for themselves. These shifts in practice would then create the places for growth that departing employees were telling us via surveys and in-person interviews they most lacked. The particular focus on the role of race, class and privilege was driven by two elements. First, the Partnership serves schools that enroll almost entirely students of color; the role of systemic racism and systems of power cannot be separated from the work the Partnership does on the ground. Second, as mentioned, of the 20 managers in the organization, 13 are managing across lines of racial difference. Therefore, without an explicit focus on this lens we would be missing an important dynamic in well over half of the manager-direct report relationships in the office. At a broader level, these trainings also fit into the Partnership's mission of creating scalable practices for the district. If the Partnership, within the home office, could find concrete and actionable strategies for development and retention, this could be a program the Partnership shared with schools and local districts as a replicable practice.

Developing the Goals and Scope

The process of developing the goals and scope and sequence for the year involved a variety of actors from across the organization. In an organization where around half of the team is tasked with delivering coaching and professional development to school leaders and teachers, wide buy-in for their own development was crucial. I used previously scheduled one-on-one conversations to ask 15 staff members for their input on either the learning goals (see above), the scope of the Series (see Appendix D), or both. These staff members included all chiefs, all

Leadership Development Series Learning Goals

Managing Self: Managers will gain a deeper understanding of their own personal development growth edges, through a lens of the role of race, class and privilege, and how those might be informing their management practices, and create and execute on a plan for continuous reflection and improvement

Managing Others: Managers will improve their skills in cultivating and leading developmental conversations with team members, including giving and soliciting feedback, coaching and listening, and supporting team members in creating plans for continuous reflection and improvement.

Managing the Work: Managers will improve their skills in delegation, time and calendar management and positive and proactive communication, with the goal of supporting both productivity and sustainability directors who work with principals, and representatives from the operations and external relations teams. Most of the feedback expressed support for the identified goals and scope, and three themes emerged that informed our development of the Series.

1) Name and audience for the Series: Team members pushed for it to be renamed from "Manager Development" to "Leadership Development." Accordingly, they also expressed an interest in expanding the audience to include an opportunity for all team members to participate, rather than only those with direct reports. In consultation with the CERO and CEO, I made a decision to open it up to the whole staff, which later had implications for how the Series was executed.
2) The role of race, class, and privilege: Of the 15 team members consulted, eight expressed enthusiasm and appreciation for the lens of race, class, and privilege; four expressed concern about the time and ability to take on so many goals at once; and three expressed more general concerns with applying that lens at all. As one team member said, "What if the ways in which we want to grow have nothing to do with race?" (personal communication, September 2017). I held one-on-one conversations with each of these team members to further explore their concerns and learn from their perspective, but ultimately decided to keep this lens. I made this decision in response to both the majority support from staff we consulted, but more importantly the original reasoning for including the lens in the first place.
3) The order and emphasis of each goal: A few of the staff members also expressed some confusion as to why "managing self" was the first goal and wondered why "managing the work" was not the first priority. These same staff members repeated these concerns after the launch of the Series and felt like the first two goals did not speak to the priorities laid out by the organizational culture committees. When these concerns were originally raised,

my assessment, as well as the assessment of the CERO, was that it was actually evidence of the importance of the goals themselves: demonstrating a need to shift mindsets around the work of management as one of adaptive leadership skills like self-reflection and coaching, rather than only a technical delegation exercise.

All three pieces of feedback and the responses to them had important implications for the impact of the Leadership Development Series and are revisited later in the Analysis.

Elements of the Project

The Leadership Development Series in its final conceptualization was made up of three elements: the group sessions, peer coaching relationships, and an observation cycle (see Appendix D: Scope and Sequence). The group sessions were scheduled to occur once a month beginning in September 2017 and continuing through July 2018. These sessions were largely facilitated by me at first, and over time began to be facilitated by other members of the team who volunteered to co-construct sessions. Although variable in content and format, the sessions often began with a short overview of key concepts (for example, adaptive versus technical challenges) and involved some sort of group discussion of core readings and an opportunity to practice coaching with one's peer coach. The focus concepts for each session rotated between the three goals (managing self, others, and the work), but all related back to a foundational adult development framework.

Peer coaching pairs were created by me, in collaboration with the leadership team, to maximize diversity, complementary strengths and growth areas, and cross-team collaboration. The coaching pairs were expected to schedule time on their own, independent of the sessions, to coach one another on leadership challenges using both their own expertise and the skills learned in the sessions themselves.

Lastly, using weekly check-in meetings as a key lever of management (both downward and upward), chiefs and peer coaches were expected to rotate in observing check-ins for the management skills learned in the sessions. For peer coaches, the hope was that these observations would provide useful data and fodder for coaching conversations. For chiefs, the hope was to use executive team meetings to calibrate and create common language and expectations for check-in practices. I then facilitated a debrief with the full E-Team of their observations and reflections on management practices within their teams.

Project Launch

The Series launched with its opening session in mid-October, followed shortly by our second session focused on "managing self" at the end of October (see Appendix D: Scope and Sequence). The original planned start date was mid-September, but this date was pushed back for two reasons. First, the CEO was out on vacation during the planned launch date, which would not have signaled the level of organizational buy-in we wanted. Second, I was also in the midst of leading a team in developing a new compensation and benefits package for the organization, which was to roll out in early October. This project took up more time than was anticipated and limited my availability to fully focus on the Series until after the roll-out was complete. The most pressing side effect of this delay was the quick succession of the first two sessions, which were only two weeks apart.

Evidence to Date

In any program aimed at improving employee retention, ultimate impact is difficult to measure in the space of only a few months – our goal was to keep high-performing employees longer, and we wouldn't know if we did that successfully until we could examine multiple years of turnover data. However, we were able to use interim measures to understand the efficacy of the Leadership Development Series in developing stronger management practices.

Before the Series began, the CEO, CERO, and I developed potential measures of success in two categories: output measures that would help us examine implementation, and interim outcome measures that would provide evidence of impact, all drawn from the Theory of Action.

<table>
<tr><th>Output Measures</th><th>Interim Outcome Measures</th></tr>
<tr><td rowspan="3">Leadership Series Component One: The Series of Trainings
a) At least five highly rated (4.0 or above on a 5-point scale) Leadership Development Series sessions by end of January 2018
b) 85% attendance on average at all Leadership Development Series sessions among managers
c) Opt-in and retention rates of non-managers, for whom the sessions are not mandatory</td><td>Manager skills in self-reflection
Management Assessment growth from Baseline (administered in November) to Post</td></tr>
<tr><td>Manager prioritization of management practices
Growth in key questions on the biannual organizational culture survey (administered in January):
a) My manager knows what sustainability looks like for me
b) My manager helps me grow to my fullest potential
c) My manager holds me accountable for continually developing my skills</td></tr>
<tr><td>Common set of language/best practices
Completion of Individual Development Plans for each staff member as part of the broader performance management system</td></tr>
<tr><td>Leadership Series Component Two: Coaching
Coaching system in place, as reported in exit ticket data</td><td>Managers and Staff are getting opportunities for growth
a) Percent of staff reporting opportunities to both give and receive feedback during performance evaluation conversations
b) Org culture survey question: I have opportunities to learn and grow at work</td></tr>
<tr><td>Leadership Series Component Three: Regular Observations
Completion of at least one round of observations by chiefs of check-ins that</td><td>Retention:
Org culture survey question that asks for planned tenure at the Partnership</td></tr>
</table>

result in at least one group debrief of promising practices and agreement on areas of growth	

Output Measures

Implementation measures were quite positive overall. Of the six Leadership Development Series sessions held by end of March 2018, all but one had an overall average effectiveness rating of over 4.0 on a 5-point scale according to exit ticket data from participants (see Table 3 below for full exit ticket data). However, the range in any given session was from a rating of 2.0 to 5.0, and many of the written comments and subsequent follow-up conversations with the authors demonstrated why there was such a wide range. One senior director, a supervisor of principals, wrote, “I do what we’re discussing every day out in the field. Why am I required to come back into the office to do it again?” (personal communication, December 2017). Given that senior directors work with 18 different principals who are all working in high-pressure turnaround contexts, I understood this feedback to mean that they felt these concepts were ones they already understood well, rather than that the actual practice of coaching through an adaptive leadership frame was something they were able to implement every day with school sites. In the small number of observations I was able to do of coaching at schools, the time was focused on immediate and urgent concerns, such as how to move a problematic staff member into a performance improvement plan, or improve student behavior in hallways. This type of coaching was clearly useful to and valued by the school leaders and teachers, but not grounded in an adult development or adaptive leadership framework. My observations were of course limited and may have been exceptions rather than the rule. That said, the general intensity of the work and challenges at school sites would lead me to believe that, understandably, coaching would most often focus on these pressing concerns and be responsive to the immediate needs of the principals, forgoing a more adult development-centered approach. As noted in the Review of Knowledge for Action, managers in turnaround situations are forced to grapple with the core tensions at the heart of those coaching questions – urgency and calm, short-term and long-term needs (O'Kane and Cunningham, 2014). In my observations, it appeared that the coaching at school sites was resolving itself in favor of urgency and short-term needs. Those coaching practices also had implications for the reception of the Series, which leaned heavily toward calm and long-term strategy. These implications are discussed in further detail in the Analysis.

The overall positive responses, with some notable outliers, were also true for attendance and opt-in data. While almost all sessions met the goal of 85% attendance for managers (see Table 3), absences were concentrated among a few participants, and notably participants in the upper ranks of the organization. In the first four sessions, four of the five absent managers were directors, senior directors, or chiefs. The March 16th session was a clear outlier in terms of attendance, and is discussed in more detail in the Analysis.

Table 3

Leadership Development Series Attendance and Ratings

		Oct. 13	Oct 27	Nov 17	Jan 19	Mar 16
Attendance	Overall	66.7%	86.1%	75.0%	83.3%	52.8%
	Manager	76.2%	95.2%	90.5%	85.7%	61.9%
Today's session was engaging		4.8	4.1	4.1	4.3	4.4
Today's session was useful		4.3	3.6	4.1	3.9	4.1
Today's session contributed to my ongoing professional development and growth		4.1	3.7	4	3.9	4.1
The ideas from today's session will be applied in upcoming conversations with my direct report(s) (or my manager)		4	3.6	4.1	4	3.8
I learned something new in today's session		4.1	3.9	4	3.7	4

I felt heard and valued in today's session	4.2	4.1	4.2	4.4	4.6
Today's session felt connected to our learning goals	4.6	4	4.2	4.2	4.3
Average overall rating	4.3	3.9	4.1	4.1	4.2

All ratings on a scale of 1 (strongly disagree) to 5 (strongly agree)
Partnership for Los Angeles Schools internal data

Among non-managers, we had a much higher than expected opt-in rate for the sessions and coaching. Out of the 20 non-manager staff members who joined the Partnership in time to join the Series, 15 opted in, and as of February we retained 12.

The second component of the Leadership Series was the coaching structures. In a March exit ticket question, we learned that 72 percent of participants reported having met with their peer coach at least three times and 67 percent of all participants rated their coaching as useful or highly useful. The qualitative data here was also helpful in bringing some nuance to the numbers. Two senior directors mentioned how valuable the coaching had been for them, and one wrote in their comments for a previous session, "The coaching is by far the most useful component of the Series – can we get more time to do this?" (personal communication, January 2018). At the same time, the reviews were not universally positive. Among those who had not met with their coach at all, many reported feeling frustrated and abandoned by their coach, and that the scheduling and re-scheduling was becoming a new source of unwanted stress.

Finally, the observations of check-ins and subsequent debriefs with chiefs were completed throughout the fall and into January. All chiefs reported completing at least one observation of each of their direct reports and shared in the debrief that the observations themselves were a very useful learning experience. The CEO shared, "This was a reminder that the work we do in schools of observing practice and providing regular feedback is actually the kind of work we need to do with each other, too" (J. Sullivan, personal communication, February 2018). During the debrief, the chiefs (collectively called the Executive Team, or E-Team) decided together to invest time in calibrating on a common observation tool for the subsequent round of observations. So while there was not yet evidence of common language at this debrief, there was evidence of desire for common language moving forward.

Interim Outcome Measures

While the output measures were relatively easy to collect, many of the outcome measures had to be reconsidered over the course of the project. Namely, both the Manager Assessment Post Survey and the creation of Individual Development Plans were pushed back to accommodate other organizational priorities.

At the beginning of the project, I created a Management Assessment Baseline Survey to get a sense of current management practices. The survey could be completed entirely online or done partly online and partly via an interview. The vast majority of participants opted for an interview, as it allowed them to complete the survey on a commute and with less work on their part. The hope was to administer a Management Assessment Post Survey in February to look for growth. The Baseline was administered as planned beginning in September, but due to team member schedules, the interviews lagged into November and December. Thus, doing a new round of Post surveys as early as February felt too soon to get any meaningful measurement of growth. The Baseline survey results did however prove to be an excellent tool for conversation across the organization. Because I was collecting so much data, I also opted to create individual reports for each manager to see their own results. The CEO requested that in talking with the E-Team about broad organizational culture survey trends, we use the reports of each chief to help us understand the results. In addition, managers on the External Relations Team used one manager meeting to dissect and support one another in analyzing their results. The full results of the Management Assessment Baseline at an organizational level can be found in Appendix E.

The other delayed measure was the creation of Individual Development Plans. Over the course of the project, it became clear that most of the staff was still experiencing growing pains with the home office's performance management system, which was only two years old. For example, in the organizational culture survey, only 72 percent of staff agreed or strongly agreed that they understood how their performance was evaluated at the Partnership. The CEO foresaw that we may need to do more work in improving the system, and felt it made sense to delay implementation of the Individual Development Plans to be part of a more comprehensive set of changes. The implications of this delay are further discussed in the Analysis.

However, the organizational culture survey data did begin to give us a picture of the impact of the Leadership Series, both its strengths and areas for improvement. Our focus questions are included below, and the figures represent the proportion of staff who agreed or strongly agreed, on a five-point scale.

Table 4

Partnership Staff Survey Focus Question Results

	Dec 2015	June 2016	Dec 2016	July 2017	**January 2018**
14. This last year, I have had opportunities at work to learn and grow.	70%	87%	93%	76%	**91%**
32. My manager helps me to develop to my fullest potential.	53%	58%	64%	64%	**70%**
33. My manager holds me accountable for continually developing my skills.	55%	71%	69%	76%	**79%**
34. My manager knows what sustainability looks like for me.	50%	55%	52%	60%	**62%**

Full data can be found in Appendix B: Partnership Staff Survey Results

Across the board, there was encouraging growth on the focus questions. Namely, the Gallup Q12 question on opportunities to learn and grow saw a growth of 15 percentage points relative to July 2017, a much larger than expected jump. It is hard, however, to know how much of that was driven by the participation of so many staff in the Leadership Development Series itself versus manager-driven opportunities to learn and grow. The evidence seems to point to the driver being the Series itself, as the growth was considerably smaller in the question on managers helping to develop skills. In other words, the higher score may be evidence that the Series served as effective professional development for staff members generally, but not evidence that it improved manager practice.

The organizational culture survey also asks a question on planned tenure at the Partnership that begins to give hints for future retention, though it's an imperfect measure. Notably, the number of staff members saying they plan to stay three or four more years doubled, which is in line with the goals the organization set around retention of an average tenure of three or four years overall. It is also worth noting that three fewer people said they were "unsure" about how much longer they would stay, which demonstrates more intentionality around sustainability.

Table 5

Partnership Staff Survey: Planned Tenure Responses

I plan to work at the Partnership for at least:	July 2017		January 2018	
	#	%	#	%
Not sure	12	27%	9	19%
6 more months	3	7%	2	4%
One or two more years	20	44%	21	45%
Three or four more years	5	11%	10	21%
Five more years or more	5	11%	5	11%

Partnership for Los Angeles Schools internal data

Analysis

Clearly, the Leadership Development Series overall had some strong but ultimately mixed results. The organizational culture data showed the beginning of shifts in attitudes toward managers and perceptions of manager practice, and some promising new perceptions of opportunities for growth and learning in the workplace. However, the questions on actual manager practice (checking in on progress, for example) showed that these positive feelings may not actually have been grounded in shifts in behavior. To help understand both the successes and shortcomings of the Series, I looked to the Leadership Practices framework codified by Marshall Ganz and Emily Lin in *Learning to Lead: A Pedagogy of Practice (2011)*. Their framework seeks to explain the conditions and actions necessary to develop distributed leadership that moves a group toward action. While the framework is typically used in the context of community organizing and political campaigns, I see reasons why it is relevant to the work of the Series, as well.

First, the framework is grounded in the intention to inspire action in a group that faces some sort of problem and where current perceptions of the problem are mixed. While some constituents may be deeply aware of the issues, others require foundational work to understand the impact of the problem on their lives. The wide variation in the Management Assessment Baseline suggests that the Partnership team was not in agreement about the need to change manager practices.

Second, the framework assumes a volunteer mindset – campaign workers are not paid for their time or compelled by threat of firing to complete tasks. Although we made a decision to make the Series "required" for managers, in reality, there was little accountability for attendance and participation. Thus, they were akin to volunteers who must be inspired to find their own inner motivation.

And lastly, the framework pushes toward the goal of leadership development across all participants. The framework posits that while traditional top-down campaigns and organizing campaigns have the shared goal of winning the issue or the race, only organizing campaigns have the additional goals of developing new generations of leaders and thereby creating collective power for future campaigns. Similarly, the Leadership Development Series, as the name said, had a goal of developing the leadership of each manager individually, in addition to moving org-wide metrics.

Of course, there are a few caveats to the framework's applicability in this context, which I will describe further below. But all of these factors together led me to believe this framework would be a useful one to dissect both the successes and the failures of the Leadership Development Series.

Overview of the Leadership Practices Framework

Ganz and Lin (2011) posit that there are five foundational practices to leadership development that build upon one another. Each requires an increasing level of autonomy across an organization, as well as the improved leadership skills of its members. Thus, if one practice is skipped or done with less fidelity, it is likely to cascade into the next.

These five practices lead toward three intertwined and equally important goals: successful achievement of campaign goals, the individual leadership development of each participant, and the creation of increased collective power for future campaigns.

The five leadership practices are as follows: Shared Stories, Shared Relationships, Shared Structure, Shared Strategy, and Shared Action. The table below summarizes the central idea of each practice. I then explore these practices in greater depth in the context of the Leadership Development Series.

Leadership Practice	Description
Shared Stories	Leaders need a sense of what calls them individually to leadership, what unites them with their fellow constituents, and what makes their problem an urgent one to address now. These shared stories or narratives are a foundational source of courage required for persevering through downturns in the campaign.
Shared Relationships	Leaders need to build relationships with their constituents to deeply understand their narratives and what the problem they are addressing looks and feels like in their daily lives. These relationships are typically built in 1:1 settings and need to be widely distributed, rather than one leader holding all the relationships.
Shared Structure	Constituents need to have a clear and defined role in the campaign that allows for efficient and effective collaboration. Teams need to be developed with shared norms for operating, senses of purpose and feedback loops. All of these must be explicitly defined, such that the team can regularly check back in on its effectiveness.
Shared Strategy	Constituents need to have a shared sense of how their shared problem will be addressed and why, with opportunities to provide their own voices and input on a regular basis. All constituents, regardless of position, need visibility into both the strategy and the tactics, and to be in constant communication about how those both shape each other.
Shared Action	Constituents need to have the opportunity, early and often, to engage in real action together. Faster learning cycles of small tactics allow for building a stronger sense of team and efficacy, which in turn leads to more action and building more power as more constituents get involved.

Adapted from Ganz and Lin, 2011.

Shared Stories

In the context of the Leadership Development Series, a shared narrative was needed to understand the purpose and importance of the Leadership Development Series learning goals (managing self, managing others, and managing the work). Given the mission-focused and fast-paced nature of the Partnership, employees needed a compelling justification to hold time on their calendars for the sessions.

In large part, I initially assumed this narrative had already been built through the work of the organizational culture committees, which had been running for the majority of the previous year. Both the CEO and the departing Chief Strategy and Operating Officer (CSOO) felt confident that the common conclusion of all three committees had been a need for manager support. In addition, the collaborative strategic planning process of the previous year had landed on manager support and development as a central strategy for organizational sustainability. All of these signals together led me to conclude that the work of building a shared narrative was largely done.

However, I ignored an important signal indicating that there was not yet a shared narrative: the original round of feedback on the learning goals. The feedback we received at that time indicated a sizable portion of the team felt the committees had agreed that manager support was important in terms of more technical management skills, not the more adaptive leadership skills that require self-reflection, and not skills around managing across lines of difference. Indeed, a narrative had formed, but it was that managers needed help managing and prioritizing workloads and teaching others how to manage and prioritize workloads. By choosing to ignore that feedback, I inadvertently created a *new* narrative, which was that this Series was disconnected from the work. This explains why, consistently, the scores around applicability to work were lower than levels of engagement in the sessions.

Similarly, there were some foundational stories in place about who the Partnership "is" that I did not take into account. Namely, the Partnership considered itself as a transformation organization, and a fast-paced team that works long hours to achieve external results, always prioritizing the needs of its schools above its home office. Inserting a series of sessions and a new coaching relationship that focused on internal work ran deeply counter to the organization's story about itself.

On the positive side, we took great pains to use chiefs as messengers to highlight a narrative around the connection between our work in supporting managers and our work in schools. In each session, we highlighted how what we were doing in that session would be practices we would want of our school leaders and teachers. This emphasis, in part, explains why attendance, even among those opting in, remained relatively high throughout the Series.

Shared Relationships

Some of my earliest work for the residency more broadly involved meeting with each member of the team individually. By my second month, I had met with well over 80 percent of team members, and by the time the Series launched in October, I had met with everyone. I also spent far longer than anticipated strategizing on coaching relationships. Both the departing CSOO and the CERO weighed in heavily, and by the end, the entire E-Team had reviewed and approved the pairings. While this process was painstaking, it proved to be foundational. No team member was paired with a coach from the same team, and team members reported appreciating the opportunity to connect with someone new.

Our careful attention to the pairings helps to explain the relatively high participation in coaching, as well as the consistent qualitative comments in exit tickets on the usefulness of the coaching relationship. In addition, on the organizational culture survey, we saw a 16-percentage point jump in response to the question "I have a good friend at work," adapted from the Gallup Q12, from 56 to 72 percent of staff members agreeing or strongly agreeing. As mentioned in the Review of Knowledge for Action, peer relationships are a key driver of retention, so these shared relationships may indeed be part of what is driving the increased number of team members planning to stay for three or four more years.

However, it was consistently harder to build shared relationships beyond the coaching relationships, leading multiple team members to report in one-on-one conversations with me that they didn't feel bonded with Leadership Development Series participants as a whole. With 36 people in the room, some of whom were managers and some of whom were not, building these relationships was difficult, and creating relationships across the whole Series may have been an unrealistic goal. People came into the room with variation in types of challenges and concerns and, importantly, variation in levels of enthusiasm. To address the variation in types of challenges faced by managers and non-managers, we set norms early on that we would have confidentiality but that we would be respectful of the people in the room by not divulging specific names or situations when discussing challenges. While helpful for catering to a mix of needs, this restriction also limited the depth of relationships that could be built, and likely limited what kinds of thoughts and ideas participants shared at all. So while opening up the Series to non-managers felt like the right call at the time in response to democratizing PD opportunities, and was specifically called out as a positive feature in the qualitative comments on the exit ticket surveys (see Appendix F), it came with real costs.

To address the variation in enthusiasm, I attempted to meet individually with people who expressed concern or disdain for the time they were expected to attend, in order to get their feedback and try to invest them in the construction of the series as it went on. Largely these meetings got cancelled for a variety of scheduling reasons, which spoke to both the real work demands that caused their concern in the first place, but again underscored the lack of enthusiasm for the Series. As noted, the March session had a very low attendance rate, an outlier for the series. As some individuals began to share that they would not be there because of existing meetings at school sites, it also gave permission for other people to deprioritize the time for less pressing concerns. Thus, the 18 people in attendance were many of the most enthusiastic and engaged participants in general. The session also had some of the most positive ratings and qualitative comments. For example, one person wrote, "I really appreciated the small group and the opportunity to really listen and be heard." This result suggested to me that the variation in enthusiasm was a more important condition to consider than I had previously realized, and the efforts at individual persuasion were less compelling than a "coalition of the willing" approach might have been.

In addition, while I met at least once with everyone, consistent meetings with certain team members were a logistical impossibility. In particular, many members of the Academic Team (A-Team) were almost entirely out in the field and were largely only in the office on Friday afternoons, which were usually reserved for their team and level-alike meetings. Thus, my own relationships tended to be strongest with Operations (Ops) and External Relations (X-Team) team members. These relationships were mirrored in the attendance data at sessions: A-Team was 34 percent of participants, but 45 percent of absences. Importantly, I also had standing check-ins with the leaders of every other team, but our CAO had such a packed schedule that adding another meeting was not possible for him. The cascading effect of this was that he was not able to give regular feedback on sessions or provide input to support making the sessions relevant for his team. This lack of feedback also meant that he was not in a place to whole-heartedly back up the importance of the Series with his team members in one-on-one settings, as both the interim CSOO and the CERO were able to do.

Shared Structure

Shared structures, in the context of the Leadership Development Series, entailed structures for the sessions themselves, community agreements for how we would operate, and an understanding of roles. The places where these structures flourished versus failed maps out quite clearly to places where relationships existed, or did not exist, and to outcomes in terms of coaching participation, Series attendance, and team growth on the organizational culture survey.

We spent significant time before the Series ever started on the basic scope and sequence for the Series, and how each session would build on the last. The feedback we received came from across teams, but more heavily from Operations and External Relations, where most of my relationships were. Those individuals agreed in advance not only on the goals, but on the idea of rotating between focus goals for each session. Their early investment in this concept meant that they were not only present and excited participants themselves, but also shared their perspective with other team members in informal conversations. For example, the Director of Family and Community Engagement gave early and frequent feedback on the structure of sessions. Her influence changed the way we thought about constructing coaching pairings and the role of cross-team collaboration. In terms of impact on outcomes, her team members had a 100 percent opt-in rate, and a significant increase in their ratings of managers caring about them as people on the organizational culture survey. On the other hand, other key leaders on the A-Team were only given the opportunity to give cursory input on the goals, and then were not consulted at all about the overall structure. In terms of outcomes, those leaders' teams had much lower opt-in rates and even attrition due to attendance issues. In fact, all three of the team members who opted in and then left the series came from teams in which the manager was not consulted about structure or goals. Notably, at the March 16th session, which had a low attendance rate overall, 94 percent of the absences came from the A-Team – participants from Ops and X-Team were almost 100 percent in attendance.

An alternate explanation for the difference between these two groups might be the pre-existing interest of some teams and leaders to engage in this kind of work. For example, the Director of Family and Community Engagement was already certified as a leadership coach, and had already begun to institute adaptive leadership and coaching practices with her direct reports. I believe the difference in readiness was an interrelated factor with, or even a precursor to, the differences in my relationships – I was drawn to and leaned heavily on those with whom I already found common ground in terms of approach and underlying beliefs about teams. I then took their voices more seriously in the development of the sessions themselves, and they had more opportunities to grow their own enthusiasm for team leadership, coaching, and other learnings from the Series.

We also spent a combined 45 out of 150 total minutes at the first two sessions establishing a shared structure around norms and agreements. As mentioned previously, we set in place norms of confidentiality and keeping out specific names, but we also set norms that were more practical, like an agreement to start and end on time. When one norm was broken in the first session, we revisited it in the second to attempt to create a culture of honest self-reflection and adherence to shared agreements. These conversations proved to be important, and also reflected a critical mass of positive relationships that had been built in advance. When we revisited the broken norm in the second session, I was able to turn to key allies in the room to help move the conversation forward in a productive way. And while the adherence to norms was hard to measure, it is noteworthy that while most meetings at the Partnership started five or more minutes late, the Leadership Development Series sessions consistently began on time, with few if any latecomers. This shared sense of ownership for keeping our agreements resulted in the strong attendance rates, as well as the ratings for the sessions in terms of feeling heard and valued.

However, we failed to establish shared understanding of roles – for coaches, for the leadership team, or for me – which is a central tenet of creating shared structures. This misstep, I believe, explained why management attitudes failed to translate immediately into changes in manager practice. One of the most important roles to establish was that of the peer coach. In spite of the time we spent constructing the pairs, we did not put an equal amount of time into establishing a common understanding of what each person would do as a peer coach. This was especially important because of what "coaching" tends to mean in educational contexts, which is more expertise-based and problem-solving, rather than driven by the individual's needs and grounded in an adult development framework. In turnaround contexts, in particular, coaching tends to be highly pressurized and focused on getting to a specific metric or outcome in a short amount of time. As noted, the observations I was able to do of coaching in the field fit that mold – Partnership staff coaching in school sites had to grapple with the tensions faced by turnaround leaders, and for the most part tended toward urgency and short-term needs of the moment. With a Series that leaned so heavily in the other direction, even the word "coaching" likely felt sharply disconnected from the "coaching" happening in the core of the Partnership's work at the schools.

There was also more work to be done in setting the right conditions for strong coaching. In informal check-ins, it became clear that when coaches were on similar "levels" of the organization (both directors, for example) and at least one person had significant coaching experience, the relationship flourished. However, in many of those relationships, one or both of those conditions were missing. In that case, the fact that we had not spent time norming as a team on peer coaching relationships became problematic. One team member reported to me that she had never actually had the chance to coach – her peer coach was under the impression that he was there to coach her exclusively, since he was the one who had previous coaching experience. In another, a team member reported that he simply felt uncomfortable coaching because although this person was not his manager, he was his "superior" in terms of organizational position. This meant that for many of our managers, the broad concepts from the leadership sessions had nowhere to become practically applied to their daily work. Ideally this application would have happened with their coach but could not if the coach did not see applying Series concepts to day-to-day work as their role.

Second, we did not establish a shared understanding of what the role of the E-Team needed to be both in the sessions and in manager development more broadly. While the CEO was my day-to-day supervisor and the CERO was overseeing the Leadership Development Series, we did not step back with the E-Team as a whole to discuss their collective role. On a practical level, this meant I was regularly chasing down the remaining two E-Team members for input and support, and at times having to go without it. Additionally, the round of observations and debriefs came as a surprise to some members of the E-Team and was pushed back to a later date more than once, again reflecting my own lack of communication with these parties. On a more theoretical level, this also meant that we did not have a venue for discussing how this work fell in among other priorities and initiatives, and how to prioritize with team members as those other commitments came up. One small example of this is in the delay of the Management Assessment Baseline interviews. I was largely tracking down team members on my own and badgering them to complete their survey and interview. Ideally, creating space for these interviews to happen would have been part of a push from the E-Team to help measure progress of the sessions. However, I did not think to ask E-Team members for help on the survey at the time as, again, we had not clarified what their role would be.

Similarly, we did not establish a shared understanding of what my particular role should be. Early on, it was clear that part of my role would be to facilitate the sessions, pulling in co-facilitators wherever possible, but not much beyond that. For example, with some managers I also played a role as an observer and occasional coach. However, that was informal and again mapped to where I had relationships. A step-back conversation to talk about my role more holistically might have provided an opportunity to discuss that coaching as a feature of my role and connected me more strategically with managers who needed support, rather than just those who asked.

In the case of both the role of the E-Team and my own role, there are three key reasons why these conversations did not happen. First, I failed to foresee that these norming conversations would be needed. My focus was largely on getting the sessions executed, rather than on the conditions around them that would make the sessions successful. Second, the organizational culture did not necessarily support step back conversations to reflect on process. Early in my tenure, the departing CSOO suggested I join an E-Team meeting to discuss how the July org culture survey data would be shared out with teams and the general process for analysis together. This meeting was rescheduled twice before it was removed from the calendar because the data were already shared at that point. In a similar example, in observing three different project debrief conversations, I saw that all three had been rescheduled and in the end, lasted less than thirty minutes, focusing mostly on reading through exit ticket data rather than generating key takeaways. Lastly, the Partnership team had actually self-identified role clarity as an area of growth for the organization as a whole. In February, the E-Team decided to roll out a new system for project management that uses a framework called "MOCHA" to clarify roles and responsibilities. Lack of clarity of roles was not unique to this Series, but rather a broader condition at the Partnership.

Shared Strategy

If the central tenets of the Shared Strategy as a leadership practice are that strategy needs to be visible to and understood by all, and that strategy and tactics need to be deeply intertwined, Shared Strategy is by far the biggest gap in the roll-out of the Leadership Development Series.

First, the strategy of using a Leadership Development Series made up of training, coaching, and observations to address sustainability issues was a strategy I thought was explained thoroughly through the organizational culture committees. However, as mentioned above, different narratives had been created in the committees on root causes of turnover and, therefore, the necessary solutions. As such, the strategy of using trainings, coaching, and observations to address sustainability issues was not clear to everyone. At the same time, the time to calibrate whole-group at the Partnership is extremely limited. In fact, an ongoing debate in the functional teams (Academic, Operations, and External Relations) is figuring out what gets decided whole-group versus in smaller sub-teams or in opt-in committee settings. Meeting time is limited and there are varying opinions about what is worth discussing. So in thinking about involving the entire team in a decision, the prospects of facilitating such a discussion become even more daunting. Logistically, because of the sheer amount of time Partnership staff members spend outside of the office, either at schools or with community partners, the only time the team can be together is during all-staff meetings, which happen monthly and are usually tightly packed. Additionally, the team does not have clear norms for such a conversation, nor a decision-making protocol for how much of the team would need to agree before a decision could move forward. Given these conditions, the divided stories about the role of management in sustainability translated into confusion about the strategy behind the Leadership Development Series itself.

In addition, when provided with opportunities to adjust strategy based on feedback, outlined in the Description, almost all of it was ignored for various reasons. While each individual decision to proceed in a different direction made sense at the time, collectively it is clear that I was not prepared to take feedback on the strategy overall. This also speaks to my own role as a hired outsider to take on this work – because the majority of the internal talent work still lay with our Director of Talent, the Series stayed relatively disconnected from the core functioning of the Partnership. I continued to see the work as a PD service I was providing, rather than an integral part of how we were thinking about broader human capital strategy at the Partnership, and this perception then influenced (and was influenced by) the perceptions of other team members.

The evidence for lack of understanding about the strategy can be seen in the qualitative comments for the Leadership Development Series sessions (see Appendix F). One such comment from session three, in November, said, "It all still feels disconnected. What happened to talking about sustainability?" In anecdotal conversations with team members, I found myself often re-explaining the connection back to the organizational culture committees, and again learning that memories about conclusions from the committees were more mixed than I had anticipated.

The second component of a shared strategy is a tight tie between strategy and tactics, in which both are consistently informing one another. Ideally, this is grounded in the shared understanding of roles already developed in which individuals or teams feel clear on their responsibility to take the lead on one or the other and stay in communication with each other. Ganz and Lin explain that the word "strategy" comes from "strategos," meaning general, who would stand at the top of the mountain, overseeing his army, or "taktikas" (Ganz & Lin, 2011). This division only works if the general stays on the mountain, but also stays in communication with the army on the ground.

In the context of the Leadership Development Series, the link between strategy and tactics would mean that the overall strategy of manager development as a lever for sustainability would be tightly tied to the on-the-ground work of the Series sessions, coaching, observations, and other emerging tactics as needed. However, our lack of clear roles in terms of owning strategy or tactics became clear at this juncture. I led the tactics well but did not either set aside time for myself nor assign a role on the leadership team for staying focused on the bigger picture strategy. As a result, we at times lost sight of the purpose of the Series – not as professional development for its own sake, but as a method for improving manager practice to improve sustainability for team members overall.

The evidence for this disconnect is clear in two places. First, the CEO, Director of Talent, and I delayed the implementation of the Individual Development Plans to instead be part of a broader set of changes to the performance management cycle to be rolled out in the next school year. While this was an understandable shift, it also demonstrates that we were thinking of the Series as something separate from focusing on manager practice, as the performance evaluation check-ins are by far the most frequently used source of manager-managee growth conversations. If we had been seeing the Series as a tool for manager practice in the service of employee retention, the delay of the Individual Development Plans would have prompted a question of where else we would see the skills learned in the Series implemented in practice. Second, the organizational culture survey data shows large gains in opportunities to grow – around twenty percentage points – but much more moderate gains in perceptions of manager influence on growth – less than five percentage points. This suggests that the Series had become a useful vehicle for personal and professional growth, or at least the belief that the Partnership provides opportunities to do so, but not necessarily for driving an immediate shift in manager practice.

That said, it is worth noting that individual managers across the organization decided independently to include questions from the Manager Assessment survey that spoke to the goals of the Series in their own evaluations, demonstrating a clear link for those individuals between the Series and their own practice as managers. These individuals again map to where there was pre-existing interest, strong relationships with me, and therefore more opportunities to give input on the Series and their own role within it. These individuals were also all in attendance at the March 16th session, again suggesting their buy-in for the Series and its applicability to their work. The implications for my own relationship management and the strategy behind it in service of the Series goals are discussed further in the Implications for Self.

Shared Action

A shared understanding of a strategy and its accompanying tactics is a prerequisite for taking part in shared actions and celebrating shared wins. The collective sense of ownership that comes with developing a shared strategy allows participants to then also take pride in victories, knowing that their work contributed to the success. The research on change management tells us that these kinds of early, small victories are vital for cementing new practices (Kotter, 1995). In the case of the Leadership Development Series, early evidence suggested that the lack of shared strategy had an impact on shared action. For example, after completing the analysis of the organizational culture survey data, I sent the data out to the E-Team with a brief summary of the results, which included highlighting the growth in the focus questions noted above. In individual conversations with chiefs, they each had a different understanding of what drove the growth for their team and expressed a desire for future surveys to be broken down to the level of individual managers to see what was driving the growth there. While it is impossible to know what truly drove the increase in the survey results, or even if that was just a fluke, the disconnect expressed by chiefs between the work on manager development and the survey outcomes was itself evidence of the impact of lacking a shared strategy.

Framework Caveats

While the Leadership Practices framework was useful for unpacking the evidence from the Series and its impact on moving managers as a collective at the Partnership, the framework rests on many assumptions that do not apply to our context and worth exploring in more depth.

First, the practices are aimed at moving a group as a whole toward action, with a premium placed on collective ownership and buy-in, rather than individualized supports. It is possible that simply in accepting and applying this framework, we sacrificed opportunities to meet each manager with unique supports. For example, it is possible that a few highly-experienced coaches would have been better able to provide support to high-need managers, rather than investing in a peer coaching system in which everyone got coaching and support, with varying levels of quality. Or perhaps group learning sessions assumed group needs, when really each manager's challenges were so unique that a better approach would have been to meet with each manager and create a customized learning plan that utilized outside resources. Our data on attendance, ratings, and survey outcomes show positive experiences and notable growth for the majority of participants, but clear outliers did not get as much from the experience in the sessions or coaching. It is possible that the framework itself reflects the mistakes we made in ignoring the outliers in a way that was detrimental.

Second, the practices are explicitly named as being in the service of organizing a constituency. As explained by Ganz and Lin, the word "constituency" comes from the Latin "con stare," meaning "stand together." A constituency stands together to face a common problem. The differences in types of work undertaken by Partnership employees is notable and somewhat unique to the Partnership's model. Almost every manager in the Partnership is overseeing a different type of team dynamic – teams of two in which the approach is more of a division of the work rather than distinct duties (the school operations team or the restorative communities team, for example), or teams of coordinators who are almost never in the office and spend more time working with the senior director as the principal supervisor for their level than their own team or manager in the office (the math and literacy teams). In some ways, the "constituency" of managers at the Partnership was already an extremely loose one. Introducing non-managers into the mix made that shared experience even looser. Starting from a place of a shared problem or need may have been a false premise altogether.

Lastly, as mentioned, the framework is largely applied to volunteers in a campaign. While the volunteer mindset overall applied well to the Series context in terms of needing to build intrinsic motivation, one key difference was that managers at the Partnership have to do other work together beyond the "campaign" of the Series. The implications of that difference were two-fold. First, peer influence likely mattered more than in a campaign context – if one's supervisor or close colleague was highly motivated about the Series, there may have been an undue influence on that individual to opt in, and that influence was also likely true in terms of opting out. Thus, our opt-in rates within teams may not have been clear evidence of series success or failure so much as peer influence. Second, some managers at the Partnership are more compliance-oriented than others, so while there wasn't any real accountability for attendance, they continued to attend anyway, regardless of inner motivation to do so. The Leadership Practices Framework relies heavily on a core leadership team being in place that is highly motivated and ready to evangelize to others. An entirely opt-in model would have more closely mirrored that structure. As it was, the Leadership Development Series' mandate for managers and resulting variation in enthusiasm may have meant that attempting to create a shared sense of story, relationships, structure, strategy, and action was an unrealistic expectation for the group as a whole.

Conclusion

While all five leadership practices were in place in some form, though missing in others, the fundamental lack of shared stories around the need for the Leadership Development Series impacted the roll-out overall. These disparate narratives were then left uncorrected, or even reinforced, by the wide variability in my own relationships with participants, as well as their relationships with one another. These relationships mapped clearly to the variability in experience of the Series, with many enjoying a strong and even transformational professional development experience, and key outliers feeling disconnected from the Series overall. The investment upfront in establishing shared agreements and structure for the Series were key to the successful experience for the majority of participants, but was undermined by the lack of clarity on roles for coaches, myself, or the leadership team. This lack of clarity then translated into all shapers of the Series (myself and the leadership team) becoming immersed in the tactics of the Series, which allowed it to become disconnected from the overall strategy of manager development as a means of improving retention. And lastly, without a shared understanding of that overall strategy, shared actions and wins were difficult to ascribe meaning to, and therefore difficult to celebrate or learn from collectively.

In the following sections, I will examine what I have learned from those successes and failures for myself, for the Partnership, and lastly for the education sector overall.

Implications

Implications for Self

Thinking about the strategic project through the lens of the Leadership Practices framework helped me to see not only the conditions and foundational practices we missed, but also my own moves as a leader that contributed to both the successes and failures. These are lessons that speak more broadly to my own takeaways for future leadership challenges, and to my role in shaping those conditions and practices.

First, I learned the importance of staying focused on the conditions for, as much as the execution of, a project, even when that means slowing down the execution. My own bias has traditionally been toward experimentation and action, with the belief that we would change the surrounding conditions through that action. However, this bias was formed in the space of a small start-up, where I was among the first five staff members to create the founding team. In a larger and more established organization where strong shared stories and beliefs already existed, those stories and beliefs needed be taken seriously as factors for success. Instead, I was quick to dismiss those stories and beliefs as something team members would soon "get over" or realize were "wrong," as seen in my responses to much of the feedback received on the Series learning goals. In this particular project, when it became clear that the very notion of slowing down one hour per month to focus on self-reflection felt counter to organizational norms, I should have suggested we do some more foundational learning practices to begin to shift those conditions (see Implications for Site, below). This also would have required me to spend my own political capital on getting buy-in for delaying the Series, especially since the culture committees had been mulling on some specific ideas around what the manager trainings should look like for the better part of a year. That said, and in part because of that reality, slowing down to focus first on conditions before moving to execution would have pushed my own leadership deeper and the results for the organization to a different level.

Second, also stemming from my bias for experimentation and action, I learned the dangers of rushing past the details of role clarity. As we formulated the project plan for manager development, the CERO pushed a few times for greater role clarity for herself and the entire leadership team. After a few rounds of attempting to gain this clarity, I became uneasy about pushing any further on the point, for fear of slowing down the roll-out of the Series. This was about my own preoccupations with wanting to be seen as action-oriented, rather than process-oriented, and not about the goal of a successful management development program. I also tend to be a stronger big-picture thinker than a details thinker, and can at times even be dismissive of going too deep into the weeds on things like role clarity. However, the details of each team member's role were the real heart of the work and where we eventually lost clarity as the Series played out.

In retrospect, these weeds were worth diving into. Even a short-term loss of political capital with the E-Team from spending so much time on process would have been worth it for a stronger shared understanding of roles for the Series. At the very least, I could have used breaks in the Series (for example, over the winter holidays) as an excuse for re-joining the E-Team to recalibrate in real time on how the roles were playing out. Understanding all of the spiraling impacts of role clarity, or lack thereof, makes me believe that this upfront time would have been well worth the potential delays.

Third, I learned that even though the work I was taking on through the Series was adaptive in nature, technical changes, both related and unrelated to the specific work of manager development, provided the credibility I needed to carry the project for the first few weeks. Separate from the Leadership Development Series, I spent my first few months of residency helping the organization overhaul their benefits offerings. I was at first worried about taking on this project, as it felt disconnected from manager development and more like a project management task. However, it was also unclear who else would be able to lead the work, so it felt like a necessary project to add to my work stream. I created an overall project plan, developed surveys and focus groups, worked with the Senior Director of Finance and

Business Affairs to work out the budget, and then worked with the E-Team and board to finalize a package we rolled out to staff in October. While these tasks were all technical in nature, they also resulted in an 11-percentage point growth in satisfaction with benefits (see Appendix B: Partnership Staff Survey Data). More importantly for my own leadership, they also built credibility with both the leadership team and the staff. They helped me demonstrate my dedication to hearing and responding to staff needs, while also keeping in mind organizational priorities. As a result, the leadership team took seriously my sense of what I heard from staff and instincts for how to respond. Additionally, the staff felt as though I heard their voices and put in a good faith effort to respond. All of this meant, when the Leadership Series started, many staff opted into the Series even though it was not exactly what they had been picturing from the organizational culture committees' recommendations. Their faith in me, in part because of those technical wins, helped carry us through the first few sessions.

This success should have taught me early on to look for other technical wins to keep my credibility intact. However, I did not always keep in mind the value of those kinds of projects. For example, before the Series ever started, multiple staff members raised the point that the performance management system's current template felt cumbersome and difficult to navigate. This feedback was particularly concentrated among senior leaders working with schools, who felt it was not modeling the kind of systems we would like to see principals using with their teachers. While a total overhaul of the template would have been a big lift, and likely brought up some adaptive challenges, finding small tweaks and places to streamline would have been an excellent project to build credibility with some of those leaders, who also felt the Series was repetitive of their current expertise, and perhaps given me opportunities to talk with them about their current performance management practices to get better insight into how to support them.

Overall, in places where I took on more technical projects, I saw new opportunities open up to carry staff with me on a more difficult adaptive road. In places where I delayed or skipped over potential technical projects, I saw a loss of buy-in from leaders impacted by those projects. For my future leadership, I will purposefully build in time to take on such projects, even when that means delaying other work, knowing that those technical wins can accelerate adaptive work down the line.

Fourth and finally, I learned for my own leadership that building relationships within internal teams holds all the same political weight, complications, and opportunities for strategizing as external relationship-building. My previous work had focused heavily on relationship-building with external partners. Building coalitions with diverse organizations required thinking politically about how my relationship with one person or group might impact my ability to build a relationship with another. This residency was entirely internally focused, and that same notion around the politics and importance of relationship-building continued to hold true.

My initial approach was simply to meet one-on-one with every individual in the organization to understand each person's perspectives and needs. But over time, I found a power map, much like the ones I had created for external partners in my previous work, was necessary to help me understand the intersection of existing team dynamics and my own relationships with each person. This power map changed over time and was not always easy to construct, but the greatest takeaway was its overall complexity. For example, as my ties grew stronger with many of the more junior ranks in the organization, my ties to their managers became more complicated. Managers expressed suspicion to me, or to chiefs, that I was actually undermining team culture by developing those relationships with their team members. In my external work, I would have counteracted this kind of suspicion by investing time in building up ties with managers – setting aside real time and resources to strengthen my relationship with that person or group, independent of their ties to the other person or group. In this role, because of its internal focus, I had not been thinking about "relationship management" as a work stream that needed dedicated time. In any future leadership role, internally or externally focused, I will keep in mind that relationship management is its own necessary and valuable use of time.

I would also spend more time thinking through the opportunities for developing and engaging relationships strategically. In the Leadership Series, I largely built relationships with those 1) in the office, and 2) already excited about the work of coaching and teaming. This may have actually been the right approach – focusing my time on a group of enthusiastic early adopters – but I did not come to the work with that strategy in mind, and thus was not building relationships with the intention of creating future "evangelists" for the work of coaching and adaptive leadership. By explicitly noting the connection between relationship development and strategy for myself, I may have seen the naturally-emerging relationships as a compelling reason to make the Series opt-in for that group of early adopters, or pushed all the harder to build relationships where they were missing among high-influence individuals on the team. In summary, in addition to building in time for relationship management, I would also bring to it the same lens of strategic investment of time and resources that is required in a political campaign.

Implications for Site

In looking back at the project, as well as its takeaways for my own leadership learning, one reflection came up multiple times: the value of creating a shared narrative around the purpose of time set aside for self-reflection and management practices. As such, all of my recommendations for the Partnership focus on how the organization might work toward that shared narrative.

First, the Partnership should engage its school-facing team members in sourcing and codifying management practices from its school sites. While the Partnership's rubrics for school leaders' evaluations do an excellent job of measuring instructional leadership, they do not necessarily capture the more managerial aspects of the principalship – running meetings effectively and efficiently, employing retention techniques with high-performing staff, or coaching teachers on time management strategies, for example. At the home office, the Partnership's management competency rubric that it uses for its own performance evaluation cycle (see Appendix G) focuses almost entirely on the technical aspects of management that lead to employee goal attainment, not the adaptive leadership aspects of management that get beyond immediate goal attainment and toward inspiring intrinsic motivation and long-term performance and retention. Before launching next year's Series, the Partnership should work with school facing staff to develop a management competency rubric that is inspired by what we believe excellent principals should be doing as managers, with the goal of long-term performance and retention. The goal would not be to develop a single rubric for both settings, given the differences in context. Rather, the goal would be to create unifying language, driven by a core set of beliefs and a vision for adaptive leadership that can help both home office and school sites envision the application of these concepts in their context.

Developing a management competency rubric alongside schools would accomplish a few things. First, it would make the link back to school sites more organic and genuine, helping to build buy-in for staff who spend the overwhelming majority of their time in the field. Particularly for the Academic Team, it would provide a compelling reason to spend time ensuring this competency is worked on in the same way any others are – the Partnership cannot expect to have credibility with school sites to coach and lead them in an area where the organization is struggling itself. Second, creating a rubric would provoke a conversation about all the aspects of excellent management in relation to one another, including the role of self-reflection and coaching. Rather than only one or two people making the argument that self-reflection plays a foundational role in the other aspects of management, like conflict resolution or calendar management, creating such a rubric would require a broader conversation about how those practices speak to each other. Such a conversation would also provide a more depersonalized venue for discussing strong management, which does not feel like it is making a judgment on anyone's current approach. Third, a rubric of management practices grounded in school sites would allow the Partnership to source exemplar practices and even potential professional development facilitators from the field. There may be a principal, for example, who has found ways to run excellent meetings with diverse teams, an area of growth in the home office. The rubric would allow the team to have common language to understand what is working about those meetings, and team members could go observe those meetings to bring back ideas.

Overall, the recommendation to ground management practices in principal practice comes back to the notion that the Partnership should model in the home office what it expects out of its schools, and think of the home office as a "laboratory" for experimentation with practices that can translate out to schools. The school-focused and mission-focused aspect of the culture is a tremendous asset, and one that can work in the Partnership's favor to develop that shared narrative around management practices.

Second, the Partnership should institutionalize more learning and reflection routines that are lower stakes, but with broader reach. Currently, there are two consistent avenues for learning and reflection: the performance management cycle, which includes opportunities for

360 feedback, and team and all-staff meeting exit tickets. Both of these feedback routines are private, and so inherently variable, and neither ideal for consistently developing a learner's mindset. All-staff and team meetings exit ticket feedback is distributed to the presenters and whether or not it is discussed again depends on the presenter's manager and their own appetite for revisiting the session. Performance management conversations happen entirely in a one-on-one setting, and the stakes are inherently higher for digesting that feedback, given the need to end with an evaluative rating.

Rather than attempting to overhaul the performance management conversations, which by definition will continue to feel high stakes, the Partnership could provide additional learning opportunities through the exit ticket feedback regularly collected in both all-staff and team meeting settings. These opportunities would ideally feel lower stakes and could help create routines around using feedback for reflection and growth, as well as help managers increase their own self-awareness and model reflective learning for their direct reports.

Specifically, the Partnership could make it a norm for teams to use one hour of a meeting each quarter for an "After Action Review" (AAR) of their meeting practices, where they look at trend data in exit ticket feedback and attempt to collectively diagnose what is working and what new ideas they could try to improve their results. The routine of it, repeating once each quarter, would be particularly important for both lowering the stakes (any new idea is only getting tried for two to three months at a time) and for practicing the self-reflection skills required to diagnose connections between inputs and outcomes. While Partnership staff members are of course professionals who have those skills, if they are under-utilized it is easy to forget how to use them, particularly in looking at one's own work.

Additionally, all events at the Partnership that involve more than one team should be followed by a standardized debrief procedure, using the AAR protocol or otherwise, to capture key learnings. These kinds of debriefs after big events happen on some teams some of the time, but are often delayed, cancelled, or squeezed into a 30-minute meeting. Having a standard practice around reflection and learning from events would serve two purposes. First, it would provide a tool and some common language that might make these types of meetings easier to conduct and keep sacred. Second, it would help send a signal that learning from action is equal in importance to the action itself. The work the Partnership undertakes at schools to transform results requires both risk-taking and ongoing, iterative learning. As such, simply executing is insufficient – the Partnership needs systems for both executing and quickly learning and improving. Having a set system in place for such learning helps to elevate the importance of that portion of the implementation cycle, and thus ensure it happens with regularity and rigor.

Finally, in the service of building a shared narrative around the purpose of management support, the Partnership should build measures of manager effectiveness into manager performance evaluations. Managers could set goals around their team's ratings on the organizational culture survey, or even around the average tenure for their teams. Currently, all managers are rated on the aforementioned management competency rubric as one of two to three competency goals, which follows the portion of the evaluation focused on individual annual deliverables. Goals for managers using this rubric tend to be focused on either team goal attainment, or team ratings of manager practice. Instead, managers at the Partnership should set specific goals around their team's retention, taking into account historical trends for the role and the team's current tenure.

This goal-setting process would again serve multiple purposes. First, having a retention goal would underscore the connection between management practice and organizational stability, an area of concern already present for most staff members. Having such a goal embeds a focus on improving management practice as a priority, equal in importance to other deliverables on each staff member's plate. Second, a retention goal prompts an explicit discussion of expectations for retention that currently goes largely unspoken and is currently creating a variety of narratives around the team for how high turnover is and should be. For example, associates, the most junior positions in the organization, have a higher turnover rate than other positions. However, in conversations with the CEO and other managers of associates, this high rate was largely expressed as the expectation – the associate position is intended to be an entry-level role that gives a young person access to a wide variety of work, with the knowledge that they will likely move on in a year or two. At times this move has been into other positions within the organization, but often not. Because the organization has not explicitly stated as the expectation that average tenure for associates should be lower, their departure is often interpreted by some team members as evidence of a culture problem or even poor management. A goal around retention that is publicly available would create a venue for debating that interpretation and perhaps unearthing ways in which that expectation is inadvertently creating a self-fulfilling prophecy. And lastly, a clear goal for retention would create a new avenue for reflection and learning with managers to both explore the impact of their own management practices and bubble up organizational practices that may be impacting retention. Currently, when team members depart, their exit interview data lives only with the Director of Talent. She then determines if and when that information is relevant to share with managers, largely only when there are clear patterns across multiple interviews that need to be addressed. A specific retention goal would give an avenue for proactively sharing that information, in the service of diagnosing what could better help that manager reach his or her retention goals. If and when managers see information that feels out of their control but impact retention, there would be greater incentive for each manager to take a leadership role in raising and addressing those concerns.

With an opportunity to ground the Partnership's understanding of excellent management in the aspirations the organization holds for its school leaders, a variety of opportunities for practicing self-reflection and learning conversations in low-stakes spaces, and a goal around retention that keeps management practice front and center in individual priorities, the Partnership would be in a stronger place to build a shared narrative around the value of management as a practice. Investing in this narrative would then provide the solid foundation needed to build shared strategy, shared actions, and shared wins in strengthening the Partnership's culture, retention and, ultimately, impact on students and families.

Implications for Sector

The Partnership's model is a unique one in the education sector, but the learnings around retention and manager development can be applied to a variety of organizations, whether they are engaging in school transformation work or otherwise.

First, it is worthwhile for any organization to invest time in creating a cohesive narrative around the drivers of employee retention. In reviewing the literature on retention in the education sector, it became clear that there are as many narratives about both what drives retention and what the retention numbers mean for organizations as there are researchers. And as mentioned, even within the Partnership itself, there were various perspectives on the links, or lack thereof, between manager practice and employee retention. In any organization, time must be invested in creating that shared narrative. For example, at a school or district level, this might mean working with teachers or other school staff to create a shared theory of action for how excellent educators get retained. In a non-profit, this might mean a board statement in the strategic plan that lays out their philosophy on how they attract and retain talent. Regardless of form, the public and explicit narrative around drivers of retention will allow for easier testing of that hypothesis, and an ongoing conversation about how to better retain high-performing team members.

Second, both internal and external metrics of progress should include both measures of retention of high-performing employees, as well as experimentation in that pursuit. As we already know from countless other policy experiments in the education sector, what we measure becomes a driving force to determine what work gets prioritized. Internal-facing team development and human capital strategy often gets deprioritized, and those metrics (such as team retention and staff satisfaction ratings) are often not included in either internal progress measures, such as strategic plans, or external-facing ones, like report cards or grant reports. This is likely coming from an understandable place of wanting to measure outcomes, rather than inputs or outputs. However, the impact of turnover on institutional knowledge and iterative progress suggests that retention may be an output worth measuring. That said, retention of high-performing team members is somewhat complicated to measure, given the length of time we are looking to measure and the variability in measures of "high-performing." So, it may also be worthwhile to measure experimentation in the pursuit of employee retention, building on the shared narrative around drivers suggested above. For example, if an organization determines collectively that principal practice and professional development opportunities are the key drivers of teacher retention, a strategic plan might include measures of both teacher ratings of principal practice and teacher ratings of PD opportunities.

Lastly, we need more research from the field on best practices in managing across lines of difference, particularly as it relates to the role of race and privilege in the context of the United States. Much of the research I found was either grounded in international contexts or was built on frameworks of bringing out diversity of thought, such as introverts and extroverts, not necessarily diversity of experience in which power and privilege dynamics are also at play. While both international contexts and connections to diversity of thought are useful and interesting, they are insufficient for the challenges faced by managers of racially diverse teams in an American context. A Latina principal leading a team of young white female teachers, for example, needs different tools and supports to both understand the challenges and address them than does a white person leading other white people, even if they are all mixes of introverts and extroverts. The history and context of the former team will play a larger role and require a different kind of support. The literature that does exist on the topic of racially diverse teams is largely grounded in suggested frameworks and practices, rather than any actual research on what works. As schools and districts work to diversify their teaching forces, this effort must go in tandem with an effort to support their managers (principals or district office personnel) in leading diverse teams through a lens of race, power, and privilege. In order to provide that support with fidelity, we need a more research-based understanding of best practice.

Across the education sector, non-profits, districts, and schools face common challenges in attracting and retaining great people. Regardless of context, a shared narrative and measures of retention tied to that narrative will help those organizations create a stronger shared strategy to address those challenges. And across the field, additional research on doing that work in the context of racially diverse teams through a lens of power and privilege will allow leaders to do that work more thoughtfully and with better outcomes for all employees.

Conclusion

Management scholar Jim Collins once wrote, “Great vision without great people is irrelevant” (2001). Public education as a sector in the United States holds a great vision for our young people – every child receiving a great education that gives them access to social mobility. To make this vision relevant, the sector also needs to attract and retain great people in its classrooms, board rooms, and non-profit offices. The Partnership, as a non-profit working to transform public schools, has found methods to attract that talent – its people are highly mission-aligned and the team is beginning to see strong results for its 18 schools. However, it also faces an average turnover rate of 18.3 percent in its team of around 45 employees, leading to limits on its own capacity, losses of institutional knowledge, and drops in team morale that then spiral into further losses of team members. With a small team and a big mission, each departure is felt widely and deeply across the whole office.

All of the drivers of this turnover are unclear, but the Partnership's own organizational culture committees came to a similar conclusion as the broader research: a manager can be a key lever for retaining excellent talent, or for pushing it out. The research also demonstrated that being a great manager in a complex environment, whether it be a diverse team setting or a fast-paced turnaround environment, both attributes of the Partnership, required a new level of leadership: skills in self-reflection, a willingness to demonstrate vulnerability and examine one's own practice, and a deep commitment to constant learning. While traditional management development courses could help managers improve technical skills like project management, delegation, or calendar techniques, these skills are necessary but not sufficient for the kind of leadership required in a place like the Partnership. Instead, managers would need support in developing their adaptive leadership skills, with opportunities to reflect and coach one another on an ongoing basis.

Thus, the Leadership Development Series was created to give managers at the Partnership exactly that space, in an attempt to support managers in retaining their teams longer. The project succeeded in creating new relationships and new structures for development, such as peer coaches and observation cycles. However, we missed a vitally important foundational step: creating a common narrative around the causes of sustainability challenges, and the role of management skills, and namely adaptive leadership skills, in negotiating those challenges. Without this shared narrative, the leadership team could not get a clear sense of their roles in cementing the Series' place in the organization, nor could the team as a whole build a sense of ownership for its strategic place in the goal of retention, and lastly, nor could the team build excitement for moments of shared action in its roll-out. More specifically, the lack of shared narrative allowed the Series as a tactic to get divorced from a broader strategic goal of employee retention, meaning that key ties to other human capital strategies, like the performance management cycle, were easy to lose.

With that understanding of the project's successes and flaws, the implications for myself, the Partnership and the sector are clear. For myself, my role in narrative creation needed to be around slowing down implementation of the Series in the service of creating the right holding environment. Namely, I needed to pay closer attention to the signals coming from the staff about their own current narratives around retention, and incorporate those into my own understanding, even mirroring those back to the leadership team when in conflict with the stated narrative. In the same vein, I needed to push for role clarity for myself and the leadership team, beyond the technical and into the more philosophical elements of our roles in the broader strategy of employee retention. And lastly, I needed to hold up relationship management and its accompanying strategic implications as an equally important part of my work to some of the more execution-focused aspects of the project. For the Partnership, there is exciting work to be done in creating more fertile ground for adaptive learning, including engaging its schools to create a common understanding of great management, creating low-risk learning environments, and including retention as a goal for managers to underscore their role in retaining great staff. And for the sector, there are lessons to be learned about the value of creating a coherent narrative around what retains talent and the value of setting metrics aligned to those narratives.

While the competition for talent is real, it is also true that the education field has rewards that no other sector can offer: a chance to hold and change our future and the opportunity to impact every other sector through our students. These future-looking and theoretical rewards are not always enough, however, and in those moments, using the vast research we have on other drivers of retention to think strategically about how to keep our talent is critical. At the Partnership, and across the education sector, working with our managers to create environments for our adults that are as rich and rewarding as the ones we hope for our students has the potential to address this talent question. We need not only great people, but great managers of people, and great environments that support and hold those managers as they lead. This will help us make our great vision for our students a reality.

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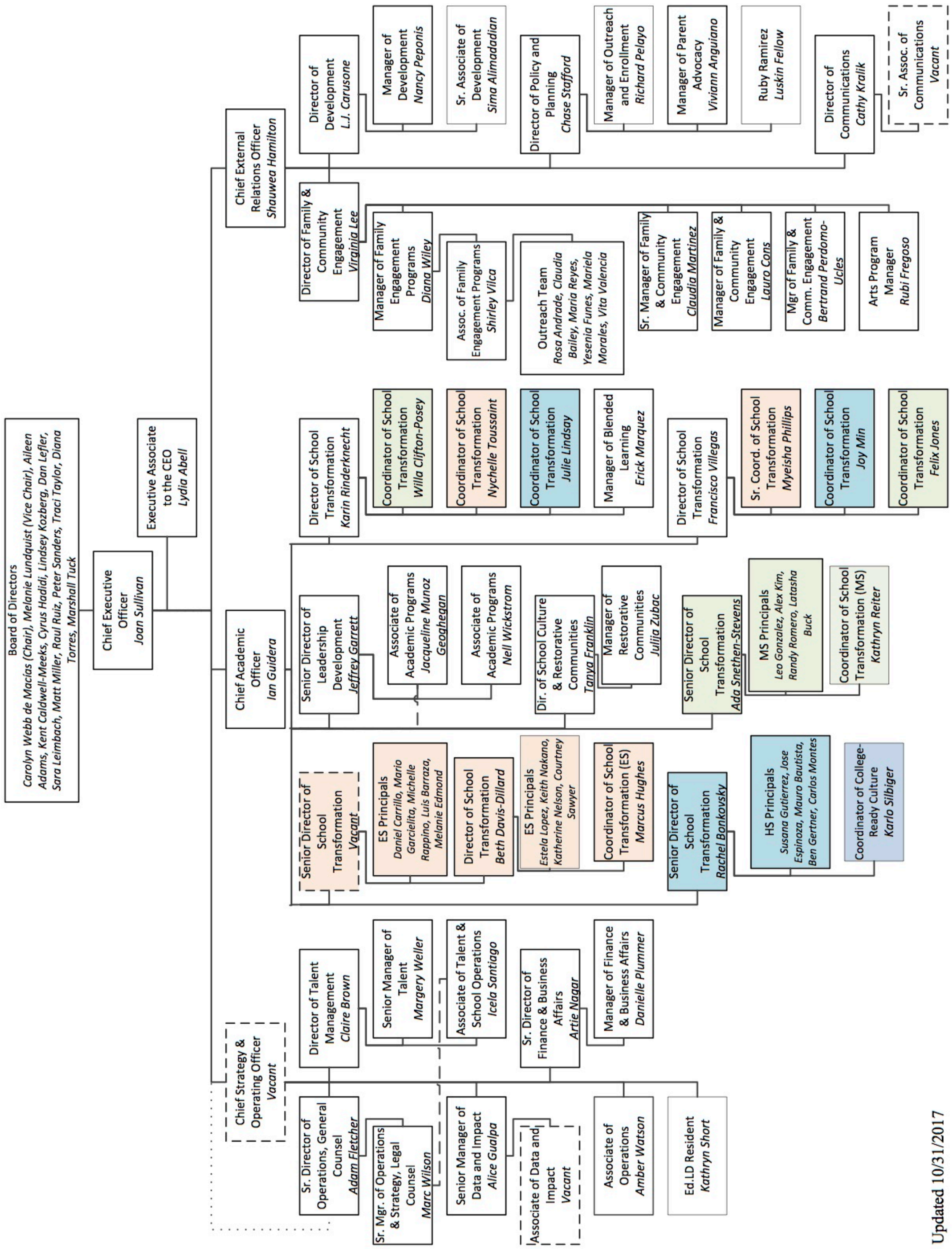
Appendices

Appendix A: Organizational Chart



Appendix B: Partnership Staff Survey Results

Raw Questions	Total Dec 2015	Jun 2016	Dec 2016	Jun 2017	Jan 2018
Number of Respondents	40	38	43	45	47
3. Indicate your agreement with the statement: I am satisfied with the following non-monetary compensation components at the Partnership. [Benefits]	65%	84%	N/A	80%	91%
4. Indicate your agreement with the statement: I am satisfied with the following non-monetary compensation components at the Partnership. [Retirement plan]	68%	89%	N/A	80%	79%
5. Indicate your agreement with the statement: I am satisfied with the following non-monetary compensation components at the Partnership. [Work hours]	53%	45%	N/A	58%	55%
6. Indicate your agreement with the statement: I am satisfied with the following non-monetary compensation components at the Partnership. [Access to colleagues]	65%	82%	N/A	91%	82%
7. Indicate your agreement with the statement: I am satisfied with the following non-monetary compensation components at the Partnership. [Work space]	35%	89%	N/A	87%	81%
8. Indicate your agreement with the statement: I am satisfied with the following non-monetary compensation components at the Partnership. [Resources]	43%	58%	N/A	64%	45%
9. I know what is expected of me at work and what it means to do my job well.	73%	89%	86%	93%	91%
10. I understand how my performance is evaluated and how it relates to my professional opportunities at the Partnership.	68%	76%	N/A	69%	72%
11.There are opportunities for professional growth at the Partnership.	53%	47%	N/A	62%	70%
12. My day-to-day work makes good use of my strengths.	68%	66%	N/A	69%	77%
13. At the Partnership, I have the opportunity to do what I do best everyday.	48%	61%	67%	62%	70%
14. This last year, I have had opportunities at work to learn and grow.	70%	87%	93%	76%	91%
15. In the last six months, someone has talked to me about my progress.	N/A	87%	93%	80%	85%
16. I look forward to coming to work every day.	75%	63%	N/A	69%	81%
17. I am proud to tell others that I work here.]	83%	84%	N/A	93%	98%
18. I have a good friend at work.	30%	42%	62%	56%	72%
19. I would recommend the Partnership as a great place to work.	55%	55%	67%	69%	74%
20. Our strategic plans and initiatives are rigorous and will ensure that our students are prepared for college.	55%	55%	N/A	71%	66%
21. The mission of the Partnership makes me feel my job is important.	100%	95%	100%	100%	98%

22. I know how to learn more about the work and priorities of other teams.	N/A	N/A	57%	73%	77%
23. In the last seven days, I have received recognition or praise for doing good work.	70%	66%	71%	76%	83%
24. There is someone at work who encourages my development.	65%	76%	79%	78%	89%
25. Partnership staff holds each other accountable for meeting high expectations.	70%	68%	N/A	87%	79%
26. The Partnership recruits top talent.	75%	82%	N/A	93%	89%
27. My co-workers are committed to doing quality work.	88%	89%	95%	98%	91%
28. I feel like this job is sustainable for me.	50%	39%	64%	56%	53%
29. Even on hard days, I know the Partnership is the best place for me.	50%	42%	60%	60%	62%
30. As a staff, we allocate the resources and time needed to achieve our goals.	20%	26%	24%	38%	40%
31. I have the materials and equipment I need to do my best work.	43%	55%	67%	53%	47%
32. My manager helps me to develop to my fullest potential.	53%	58%	64%	64%	70%
33. My manager holds me accountable for continually developing my skills.	55%	71%	69%	76%	79%
34. My manager knows what sustainability looks like for me.	N/A				62%
35. My manager, or someone else at work, seems to care about me as a person.	N/A	95%	93%	91%	94%
36. I am fairly compensated for my work.	63%	74%	62%	67%	68%
37. My opinions seem to count.	63%	68%	74%	78%	81%
38. I have confidence in decisions made by the E-team.	58%	63%	N/A	82%	72%
39. Overall, I am satisfied with working at the Partnership.	65%	63%	79%	69%	83%
40. I believe the Partnership (as a whole) serves our communities in a respectful and culturally competent manner.	N/A	N/A	N/A	80%	72%

Appendix C: Partnership Budget

		FY 2016-17 Projected Actuals	FY 2017-18 Proposed Budget	Change from 2016-17 ($)	Change from 2016-17 (%)
(1)	**REVENUE**				
(2)	Private Funding committed	$12,312,819	$ 8,578,300	$ (3,734,519)	-30%
(3)	Private Funding received in prior year(s) for 2017-18	$ -	$ 224,391	$ 224,391	N/A
(4)	Public Funding	$ 186,223	$ -	$ (186,223)	-100.00%
(5)	Expected Fundraising	$ -	$ 4,531,972	$ 4,531,972	N/A
(6)	**TOTAL REVENUE**	$12,499,042	$13,334,663	$ 835,622	**6.69%**
(7)	**EXPENDITURES**				
(8)	**PARTNERSHIP HOME OFFICE**				
(9)	Partnership Support Team	$ 6,602,077	$ 6,777,857	$ 175,780	2.66%
(10)	Material & Supplies	$ 704,878	$ 781,901	$ 77,023	10.93%
(11)	**SCHOOL TRANSFORMATION MODEL**				
(12)	**Great Leaders**	**$ 412,804**	**$ 447,577**	**$ 34,773**	**8.42%**
(13)	School Leader Growth & Development	$ 323,116	$ 336,931	$ 13,814	4.28%
(14)	School Leader Talent	$ 89,688	$ 110,646	$ 20,958	23.37%
(15)	**Highly Effective Teaching**	**$ 1,373,158**	**$ 1,856,896**	**$ 483,738**	**35.23%**
(16)	Teacher Leadership	$ 693,044	$ 754,808	$ 61,764	8.91%
(17)	Teaching & Learning in the 21st Century	$ 656,030	$ 1,073,657	$ 417,628	63.66%
(18)	Teacher Talent	$ 24,085	$ 28,431	$ 4,346	18.04%
(19)	**Engaged & Empowered Communities**	**$ 432,857**	**$ 485,332**	**$ 52,475**	**12.12%**
(20)	Collective Impact	$ 115,610	$ 84,196	$ (31,414)	-27.17%
(21)	School Level Capacity Building	$ 90,473	$ 33,323	$ (57,150)	-63.17%
(22)	Parent Leadership	$ 226,774	$ 367,813	$ 141,039	62.19%
(23)	**Strategy & Support**	**$ 1,146,039**	**$ 1,485,101**	**$ 339,062**	**29.59%**
(24)	Financial Sustainability	$ 56,672	$ 227,865	$ 171,193	302.08%
(25)	Communications	$ 247,977	$ 176,714	$ (71,263)	-28.74%
(26)	Organizational Culture	$ 74,744	$ 97,656	$ 22,912	30.65%
(27)	Network Growth	$ 510,985	$ 215,450	$ (295,535)	-57.84%
(28)	Systems Change	$ -	$ 36,623	$ 36,623	N/A
(29)	Network Wide Supports	$ 255,661	$ 730,793	$ 475,132	185.84%
(30)	**TOTAL EXPENDITURES**	$10,671,813	$11,834,663	$ 1,162,850	10.90%
(31)	**NET INCOME**	$ 1,827,229	$ 1,500,000	$ (327,229)	-17.91%

Appendix D: Leadership Development Series Scope and Sequence

	Manager Meeting Focus*	Tools introduced/used	Observation Cycle	Coaching	Other Manager Responsibilities to note
September 2017	Introduction to goals, coaching pairs, norm setting and community building	Coaching for Transformation Framework	--	--	Goals due
October 2017	Managing Self: Self inventory, developing growth goals	360 Feedback Strengths Finder Social Styles Individual Development Plans Observation "Look For" Document	Chiefs observe	Coaching pairs: Norm setting and growth goal setting	
November 2017	Managing Others: 3 Levels of Listening/Humble Inquiry and Coaching 90 minutes: fold in individual goals check-in meeting	3 Levels of Listening/Humble Inquiry Check-in agendas	Coach observes 1 check-in	Coaching pairs: 3 Levels of Listening/Humble Inquiry practice on leadership dilemma	Individual goals check-in due Dec. 1
December 2017 OPEN	Managing the Work: TMC training??		--	Coaching pods: Fishbowl practice	
January 2018	Managing Self: ITC Maps Rubric review - look back at Management competency and edit/add as needed from the Self Awareness and Self-Management elements of the SEL standards	Immunity to Change (ITC maps)	Chiefs observe	Coaching pairs: 3 Levels of Listening/Humble Inquiry practice on leadership dilemma	
February 2018	Managing Others: Soliciting, and then giving, feedback 90 minutes: fold in individual goals check-in meeting	Feedback framework from staff retreat Self-Management and SCARF Threats	Coach observes 1 check-in	Coaching pairs: 3 Levels of Listening/Humble Inquiry practice on leadership dilemma	Individual goals check-in due Feb. 23
March 2018 OPEN	Managing the Work: Meeting facilitation and best practices		--	Coaching pairs: ITC Map	
April 2018	Managing Self: Carving out time for reflection Rubric Review:	Outlook calendar	Chiefs observe	Coaching pairs: ITC Map	

	Growth Mindset				
May 2018	Managing Others: Promoting reflection in others 90 minutes: Fold in EOY conversations meeting		Coach pod member observes 1 check-in	Coaching pods: Fishbowl practice	360 Feedback due
June 2018 OPEN	Managing the Work: TMC follow-up		--	Coaching pairs: ITC Map	
July 2018/ August 2018	Wrap up year one - Check-in on goals, growth goals for coming year Rubric Review: Social Awareness and Relationship Skills		Chiefs observe	Coaching pairs: ITC Map	Manager ratings due to E-Team July 23; EOY Evaluations due August 10 Goals for 2018-19 due August 31

Appendix E: Org-Wide Management Assessment Baseline Results

When asked how to share the data, teams and sub-teams broke down accordingly (I only included teams with 3+ members):

	Ops		X-Team			A-Team				Whole org
	All	Talent	All	Dev't	FACE	All	Math	Lit.	PM	
Big trends	0%	0%	35%	0%	66%	6%	0%	0%	100%	22.5%
Key quotes	0%	0%	30%	50%	33%	17%	0%	0%	0%	20%
Full data	100%	100%	35%	50%	0%	77%	100%	100%	0%	57.5%

Question	Ops	X	A	Whole Org
In the last 30 days how frequently have you heard your manager reflect critically on their own thought processes? *(1=Never; 5=Frequently)*	4	3.2	3.6	3.2
In the last 30 days how frequently have you heard your manager reflect critically on their own thought processes through a lens of the role of race, class and privilege? *(1=Never; 5=Frequently)*	2.4	3.1	3.2	2.7
How much of a priority does this growth area appear to be this year? *(1=Very low priority; 5=Very high priority)*	2.8	3.3	2.8	3.1
Did you tell your manager about the last challenge or setback you faced in your work?	YES: 100% NO:	YES: 93% NO: 7%	YES: 82% NO: 18%	YES: 88% NO: 12%
How frequently does your manager... [Encourage you to reflect critically on your own thought process?] *(1=Never; 5=Frequently)*	4	3.4	3.3	3.5
How frequently does your manager... [Solicit feedback about their own management practices?] *(1=Never; 5=Frequently)*	3.6	3.2	3.6	3.0
How frequently does your manager... [Offer feedback on a work product?] *(1=Never; 5=Frequently)*	4.8	3.5	3.4	3.8
How frequently does your manager... [Offer feedback on your personal and professional growth goals?] *(1=Never; 5=Frequently)*	4.4	3.4	3.8	3.6

Think about the last time you received feedback (work product or personal/professional). How well did your manager listen before, during and after providing that feedback? *(1=Very Poorly; 5=Very Well)*	4.6	3.5	3.9	3.8
[Optional] Did your manager inquire about your own communication and feedback preferences? If so, how?	No: 80% Yes: 20%	No: 80% Yes: 20%	No: 28% Yes: 72%	No: 51% Yes: 49%
Now think about your relationship with your manager holistically. How would you rate your relationship? *(1=Very weak; 5=Very strong)*	4.8	3.4	3.8	3.8
On a scale of 1 to 5, where 1 is "Strongly Disagree" and 5 is "Strongly Agree," please rate your level of agreement with these statements.				
My manager believes I can grow my skills in the fundamentals of my work.	5	3.5	4.4	4.3
My manager cares about my communication preferences.	4	3.3	3.9	3.7
My manager communicates clearly and consistently.	4.6	3.1	4.1	3.7
My manager expresses gratitude for me and my work.	4.8	3.3	4.6	4.1
My manager cares about my sustainability here.	4.4	3	4.2	3.8
When was the last time your manager actively inquired about your sustainability and workload?	Within the last… 1 month: 60% 2 weeks: 40%	Never: 15% Within the last... 6 months: 15% 3 months: 15% 1 month: 23% 2 weeks: 32%	Never: 17% Within the last... 6 months: 6% 3 months: 6% 1 month: 17% 2 weeks: 44% Other: 11%	Never: 12% Within the last... 6 months: 9% 3 months: 14% 1 month: 23% 2 weeks: 35% Other: 7%
How well would you say your manager currently delegates work? *(1=Very poorly; 5=Very well)*	4.4	2.9	3.8	3.6
How well would you say your manager currently models time and calendar management? *(1=Very poorly; 5=Very well)*	3.6	3.1	3.7	3.5

Appendix F: Selection of Qualitative Comments from Leadership Series Exit Tickets

Session 1
Great use of time, went by very quickly. Loved the reading, especially the one on race and leadership. Well organized and engaging. Thank you for doing this. I was feeling anxious about the session but from the very first activity I was put at ease. Thank you. I'm feeling especially unconvinced that the coaching model we're discussing will be useful. This is probably my own issue to resolve, but this is where I'm at. I think it's great we are investing in our development as leaders and that this is open to everyone in the org. The PD is very welcome.
Session 2
Great readings! Not enough time to do them justice. Coaching practice is so important! I'm not sure there is any value in cramming it in. How can we do less, but deeper? Everything today was so important! Time went too fast – don't think we spent enough time in high leverage stuff like the coaching conversation I remain very skeptical of these coaching pairings. I don't feel that this will help me. Thank you for addressing your teaching/learning moment and having Ian address it as well. I think that modeling is the best way to create a brave space.
Session 3
The defensive article was a great lens to issues I struggle with. I was sorry to see it wasn't covered. Maybe it would be good content for a staff meeting? Please. We need help with this. Also, we are held accountable for our goals but managers are not held accountable for the feedback given. Because of power structures there is little incentive for me to continue to give feedback. I appreciated the deeper dive, more large group discussion, and connecting with other folks outside my immediate team. It all still feels disconnected. What happened to talking about sustainability? The most valuable part of these sessions thus far have been time with my coach. So the more we can have that time, the better. A lot of the material we are covering I have had a lot of experience with. I'm pushing hard to stay in learner stance, but I did want to flag this. I'm probably not the only one. Today's session was useful and immediately applicable to upcoming meetings. I also loved how interactive and engaging today's session pushed us into being. More please!
Session 5
I liked the opportunity to hear the coaching session between a sr. director and principal – are we able to see the other example videos? Shared facilitation was phenomenal! I wish more people could watch/discuss Joan and Kathryn's check-in More discussion time in a larger group would have been helpful for broader scope of opinions/insight. I was interested in all of the topics, and choosing just one felt limiting. I would've appreciated hearing a coaching session both affirming and challenging. We only heard an affirming model. Thank you for preparing the videos. Really enjoyed the group discussion with time for team and coach.

Session Six
I actually appreciate the smaller group and its energy. This was great and I wish we had more time to dive deeper Coaching has been instrumental for my sustainability at this org. It's helpful to have additional support through this peer coaching model. I think it would be beneficial to do a basic training for folks on coaching. From my observations, I don't think that all people have the skill set, which makes it challenging to maximize this opportunity. I appreciated the small group and the opportunity to really listen and be heard Great session; more time for discussion would be good

Appendix G: Partnership Management Competency Rubric

	Ineffective = 1	Developing = 2	Effective = 3	Highly Effective = 4
Management Skills (Managers Only)	• Individual's work is rarely oriented toward supporting direct reports to meet goals and grow professionally. • Individual rarely communicates expectations to direct reports, and rarely utilizes the Partnership performance management process to support direct reports' growth. • Rarely provides feedback that leads to growth.	• Individual's work is regularly oriented toward supporting direct reports to meet goals and grow professionally. • Individual regularly communicates expectations to direct reports, but expectations may not be high or ambitious. • Regularly utilizes the Partnership performance management process to attempt to support direct reports' growth. • May make decisions in interest of the team, but not always in the interest of Partnership-wide mission and goals. • Regularly gives feedback that leads to growth.	• Individual's work is frequently oriented toward supporting direct reports to meet goals and grow professionally. • Individual frequently communicates high expectations to direct reports. Frequently pushes direct reports to develop and work toward goals. Sees how direct reports play a role within their team. • Frequently makes strategic decisions in the interest of team-wide and Partnership-wide mission and goals. Supports development of direct reports through Partnership performance management process, including holding check-ins and monitoring progress toward goals. • Frequently gives direct, objective, and constructive feedback that leads to growth and job satisfaction for direct reports.	• Individual's work is always or almost always oriented toward supporting direct reports to meet goals and grow professionally. • Individual always or almost always communicates high expectations to direct reports. Always or almost always pushes direct reports to develop and work toward stretch goals. Maintains eye on the "big picture" and sees how direct reports all play a role within their team and also in the Partnership organization. • Always or almost always makes strategic decisions in the interest of team-wide and Partnership-wide mission and goals. Maximizes development of direct reports through Partnership performance management process, including leveraging check-ins and goal tracking to ensure transparency between manager and direct report. • Always or almost always gives direct, objective, and constructive feedback as well as makes recommendations for growth steps.