



Innovating for Equity: Schools Designed and Co-Created to Disrupt Institutionalized and Systemic Racism

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**Innovating for Equity: Schools Designed and Co-Created to Disrupt
Institutionalized and Systemic Racism**

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

Submitted by

Crystal Palmero Ward

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

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Dedication

For the remarkable children and young people I have had the honor to learn from and serve as your teacher, coach, and leader. Your generosity, love, intelligence, and dreams give me hope.

You are my why.

Acknowledgements

To my parents, the seed of possibility and audacity was planted in my heart because of your belief and love in me. Leaving the Philippines and Youngstown, Ohio set in motion a series of events that have led us to this very moment. This accomplishment is a direct result of your collective sacrifice and courage.

To my siblings: My big brother, Joey, as a kid all I wanted to do was stand out from your gigantic shadow, not realizing that you paved the way for me to be fearless by leading by example. My A1 and favorite sister, Catherine, you've taught me how to live life with joy and to laugh until my cheeks hurt. Your gentle spirit and generosity is needed in this world. My heart grew infinitely when you were born, Michael. With so few words, you speak volumes. You have a gift and story that can only be written by you – I'm so proud and can't wait to learn from you. Your collective support has sustained me, made me laugh, and pushed me forward in the most critical moments.

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Abstract

The current U.S. K-12 education system is antiquated, and it has consistently failed to serve our country's most vulnerable populations. Despite the rapid transformation of our world community, technology, and the economy, and the soaring demand for highly skilled and educated workers, the industrial model of schooling used in our 21st-century classrooms remains virtually unchanged. Transcend's mission—to inject and accelerate innovation into the core design of schools—is predicated on the belief that schools must become more equitable and exceedingly better at preparing all children for college, life, and career. We also know that innovation alone will not result in tangibly improved and equitable outcomes for our nation's school children, unless the systems, beliefs, institutions and structures that uphold racism are disrupted in the innovation process.

As a Transcend resident, I had the opportunity to lead the creation of a school design incubator pilot that addressed the following core questions:

1. What inputs and experiences promote the conviction to deliberately re-design schools to provide equity-centered outcomes?
2. What coaching supports help school founders independently leverage Transcend's assets to design their schools' visions?
3. What leadership skills and beliefs are required to innovate successfully?

Introduction

Transcend Overview

Transcend is an education nonprofit that operates nationwide with the mission of accelerating innovation in the core design of schools. Founded in 2015 by Jeff Wetzler and Aylon Samouha, Transcend aspires to be the research and development (R&D) engine of the education sector. Wetzler and Samouha founded Transcend in response to communities' increasing demand for better schools. They also were motivated by their understanding that the traditional model of school, inspired by industrialization, is not only outdated but is failing to ensure that all students can be successful in school, life, and career. They have a firm conviction that it is necessary, and possible, to create exceedingly better and more equitable models of schooling.

Three core assets enable Transcend to do its work: its talent force, a strong knowledge base, and its networks. Using these assets, Transcend has come to believe it has a two-fold role in the field: (1) with its partners, to conduct intensive R&D to co-create “catalytic models,” and (2) to enable communities everywhere to advance their innovation journeys to improve schools. Transcend believes its partnerships will produce equitable and holistic results for kids, families, and educators. It hopes to inspire ever more communities to adopt and adapt its innovative designs, which will lead to the creation of extraordinary learning environments for many more of our nation's students.

Dream and Discover

Transcend's Dream and Discover (D+D) team, which sits within the School Partnerships function (see Appendix A for Transcend Organizational Map), is led by Brittany Erickson, an alumna of Harvard Graduate School of Education's Doctor of Education Leadership Program. For the past two years, the D+D team partnered with the

NewSchools Venture Fund in a program called the Collaborative. In each of the two years, the Transcend/NewSchools Collaborative brought together a national cohort of 10 design teams who took part in a highly selective process. Each cohort convened three times in a 10-month period to participate in design activities, to make “inspiration and learning” visits (curated experiences that bring educators to inspiring and thought provoking places meant to stimulate creativity and spark ideas for their school designs), and to have uninterrupted time to imagine how they would rebuild the future of schooling for their specific contexts. The Collaborative’s process served to advance aims Transcend has identified as critical to successful school model innovation:

- **Conviction:** The steadfastness and courage to reimagine school
- **Clarity:** A crisp and compelling vision and design for a new learning community
- **Culture:** Organizational norms and practices that support ongoing innovation, including trust, open communication, and risk-taking
- **Capacity:** A plan for assembling the people, time, skills, and resources to bring a vision to life
- **Coalition:** Strong relationships and a shared vision with students, families, educators, and community members who will ultimately make up a new learning community and carry the vision forward

A case study, titled “The Collaborative: What We Learned from Bringing Educators Together to Reimagine School,” summarized the key results and the six lessons learned from running the 10-month program (see Appendix B for Case Study Executive Summary).

Instead of creating a third national cohort for fiscal year 2018-2019, the D+D team ran seven pilots to test the spread of the codified school design materials developed by the Collaborative. I oversaw and led two of these pilots during my residency.

School Design Incubator Pilot

The school design incubator pilot came about because of demand from the field. Transcend was sitting on a rich supply of talented and self-driven school founders who wanted visioning support and coaching, but the organization did not have the internal

capacity to coach them and no other organization was offering to support these founders along their school design journey.

The school design incubator was able to meet the demands of this group while also providing a space in which to uncover and test the factors, beliefs, and conditions that facilitate equity-centered innovation, and to understand how our materials are being adopted in multiple contexts and environments.

Problem of Practice

When I began working at Transcend, a question that helped to frame the strategic project emerged: “How might we partner with new school founders in order to help accelerate their design journey using our codified process and assets?” As I became familiar with Transcend’s previous two years’ work by leading a large project with the Silicon Schools Fund, the critical realization emerged that we had the opportunity to clarify our vision of designing with a focus on equity while learning simultaneously how to push education leaders in creating new school visions that placed equity at the center.

Our aim as an organization was to impact all children through education; therefore, we had an imperative to accelerate our ability to help unearth and upend harmful beliefs and biases that often are present in the design and execution of schools, and that intersect with the underachievement of our nation’s black and brown and poor children. This sense that we had the opportunity to strengthen equity and leader awareness through our innovation process emerged while we were coaching the teams of incubator founders and the Bay Area design teams who were part of the Silicon Schools Fund project. This sense was further substantiated when we read The New Teacher Project’s (TNTP, 2018) most recent report, “The Opportunity Myth: What Students Can Show Us About How School Is Letting Them Down—and How to Fix It,” and spoke to a lead researcher from the study. For two years,

TNTP worked closely with five school systems to observe the in-classroom educational experiences of students, the goal being to gain a better understanding of the students' aspirations, the lives they imagined leading, and the role school played in helping them prepare to live out those dreams—or failed to do so. Across this sample, 94% said they planned on going to college, yet the Bureau of Labor Statistics cites that only 69.7% of high schoolers who graduated in 2016 actually enrolled in college. Moreover, inequity in college enrollment and persistence can be predicted by race. Georgetown University's Center on Education and the Workforce found that selective public colleges over-enroll white freshmen (64% of those enrolled vs. 54% of the college-age population) while under-enrolling black (7% of those enrolled vs. 15% of the college-age population) and Latinx (12% of those enrolled vs. 21% of the college-age population) freshmen. College persistence rates also illuminate inequities: across public and private institutions in 2016, 78.6% of white and 85.3% of Asian students enrolled and persisted a year later, compared to just 67% of Black and 70.7% of Latinx students (NSC Research Center, 2018). It is no surprise that, when considering whether schools were holding up their end of the bargain in preparing all students for college and life, by and large they are not.

“The Opportunity Myth” identifies four key themes in terms of how schools and teachers might fix the “myth”: by increasing opportunities to engage with grade-appropriate assignments, providing strong instruction that enables students to do the heavy lifting of thinking and problem-solving in their daily lessons, encouraging deeper student engagement, and having high expectations that underscore the belief that all students can meet grade-level benchmarks and standards. Of these four areas of improvement, adult expectations had the highest impact on student growth on state-standardized tests across all classrooms: the study results showed an achievement difference of +4.6 months between the top and bottom

quartile classrooms. Adults' high expectations had an even greater benefit for students who started the school year behind grade level; when comparing the top and bottom quartile classrooms on the state test, those in which the teacher had high expectations saw achievement growth of +7.9 months.

The conversation about the impact of teacher expectations on student achievement was launched as a national conversation when Robert Rosenthal and Lenore Jacobson published *Pygmalion in the Classroom* in 1968. This pivotal book captured the impact of teachers being told at the start of the school year that some students were “intellectual bloomers.” The net positive effect on those students' achievement, especially in the earliest grades, led the researchers to conclude that teacher expectations can have an impact on student achievement. This finding along with the TNTP report validate the fact that achievement is not solely driven by students' innate abilities, but instead, the expectations of adults and the decisions they make about a student's capabilities are key variables in student achievement.

The problem of practice, therefore, is framed by the following questions:

1. What inputs and experiences promote the conviction to deliberately re-design schools for equity¹-centered outcomes?
2. What coaching supports help school founders leverage Transcend's assets in designing their school vision?
3. What leadership skills and beliefs are required to innovate successfully?

¹ “Every child gets what [they] need in our schools – *every child*, regardless of where she comes from, what she looks like, who her parents are, what her temperament is, or what she shows up knowing or not knowing. Every child gets what she needs every day in order to have all the skills and tools that she needs to pursue whatever she wants after leaving our schools, and to lead a fulfilling life. Equity is about outcomes and experiences – for every child, every day” (Aguilar, 2013, p.xiii)

To organize myself to answer these questions in my review of knowledge for action, I pinpointed literature that focused on organizational strategy, innovation research, innovative leadership competencies, organizational ambidexterity, immunity to change, and equity.

Review of Knowledge for Action

Problem Identification and Root Cause Analysis

For decades, education reform across our nation has continually failed to produce wide-scale school improvement. In *Learning to Improve*, Bryk, Gomez, Grunow, and Lemahieu (2015) argue that failed education reform is due to education leaders “going fast and learning slow,” wherein they perpetually focus on disrupting the system substantially and quickly without considering “what it actually takes to make some promising idea work reliably in practice” (p. 16). These authors propose that school improvement must include isolating a specific problem to solve while ensuring that solutions are user centered. Stacey Childress and Geoff Marietta parallel Bryk et al. in purporting that the “first and most critical step of solving a performance problem is to accurately identify it” (2017, p. 2). As the literature suggests, school and school system improvement begin with a disciplined approach to identifying the problem we seek to solve.

Bryk et al. (2015) and Childress and Marietta (2017) agree that a strategy can only come after deliberately diagnosing a problem and analyzing its root causes, and they recommend leveraging practical tools to help identify the root cause of any problem. Bryk et al. suggest using a causal system analysis, which starts with an analysis of the root causes that are producing the dissatisfactory outcomes, while Childress and Marietta offer the Public Education Leadership Program (PELP) coherence framework as a tool for finding gaps in performance and coherence.

Innovation, Strategy, R&D

Before we can discuss how to innovate, we must first define innovation. We can then review the research on innovation and innovation strategy and synthesize how this informs action. *The Oxford Handbook of Innovation Management* states that the term

“innovation” has been used both “widely and promiscuously”; the handbook defines it as “the successful application of new ideas” (Dodgson, Gann, & Phillips, 2014, p. 4). Joseph Schumpeter, considered the father of the study of innovation, defines innovation as “new combinations” of existing elements (Dodgson et al., 2014, p. 5).

In 2014, Ammon Salter and Oliver Alexy penned a chapter titled “The Nature of Innovation,” in which they summarize the stylized facts of innovation studies and research over the past 50 years. They define a stylized fact as “a simplified presentation of an empirical finding” (Cooley, 1995). Of the 12 stylized facts they mention, four directly relate to helping to understand innovation within the context of Transcend and the education sector: (1) innovation is relational and often involves collaboration between two or more parties; (2) invention and innovation are separate and distinct concepts, although creativity is indispensable to invention; (3) innovators usually fail to capture returns from their innovations because creating innovation and capturing returns requires different skillsets; and (4) there is an agreed upon set of organizational routines that are most helpful in managing the innovation process.

The first stylized fact highlights what the business sector is keen on understanding: the how—that is, that the value of an innovation is only created through consumer and business demand; and the why—that is, the need for early adopters is a crucial initial step in spreading innovation. The second stylized fact cites three key factors needed for creativity: a person’s determination and intrinsic motivation, whether a person perceives their organization as having a climate that supports creativity, and working with leaders who tolerate failure and provide psychological safety to pursue activities that break from the norm. The third fact is that research has confirmed that “the skills required to generate innovation differ significantly from the skills required to capture their returns” (Salter &

Alexy, 2014, p. 12). Finally, the fourth fact includes the following routines that help support innovation: creating a separate unit where innovation can occur while leveraging core business assets; a culture that offers autonomy and tolerates failure; and a set of tools that help organizations select R&D projects to ensure there is not an over-reliance on instinct. These stylized facts collectively illustrate key conditions for organizational innovation and should inform decisions about organizational strategy.

Economist Gary Pisano (2015) defines strategy as “a commitment to a set of coherent, mutually reinforcing policies or behaviors aimed at achieving a specific competitive goal” (p. 2). Pisano’s “Innovation Landscape Map” (see Figure 1) reveals four types of innovation that happen along the axes of business models and technical competencies. The “Map” can help a business identify where their innovation fits within their current business model and their existing capabilities.

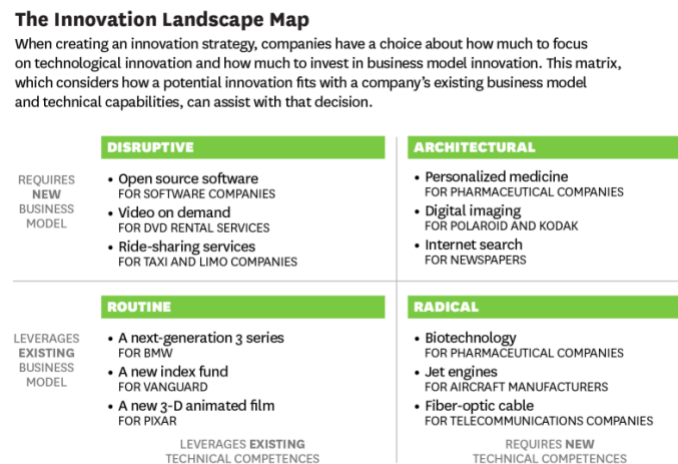


Figure 1. The Innovation Landscape Map, Source: Corning; Gary P. Pisano

Pisano (2012) writes that “a good strategy provides *consistency, coherence, and alignment*” (p. 1). If it is to achieve consistency, coherence, and alignment, an innovation strategy should be able to answer three key questions: (1) How does the innovation create value for customers? (2) How does the company plan to capture a share of the value produced by the innovation? (3)

What types of innovations allow the creation and capture of value and what resources should each type of innovation receive? (Pisano, 2015, p. 6-7). An innovative company should be able to answer these three questions and identify where in the landscape map the innovation it is creating falls, because this will inform whether or not it should create a new business model or acquire new technical competencies.

In *Creating an R&D Strategy*, Pisano (2012) states that organizations fail to improve their R&D performance because of misconceptions about what truly drives it. Underscoring that there is no one R&D model that works in all contexts, Pisano offers four categories within which leaders should make decisions when constructing an overall R&D strategy: architecture (organizational and geographical structure), processes (how R&D is formally and informally executed), people (mix of expertise among personnel), and portfolio (the criteria used to sort, prioritize, and select projects and subsequently allocate resources to). Figure 2 illustrates this decision-making matrix.

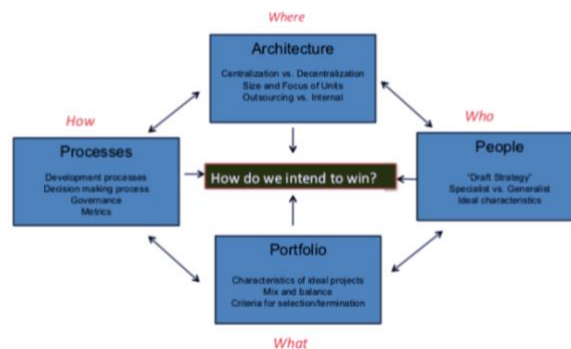


Figure 2. Elements of an R&D Strategy, Source: Pisano (2012)

If we are to create an R&D engine for the field within Transcend, our strategy must create coherence and be clear about how we intend to leverage and learn from innovations to improve outcomes for all students. Our strategy must also acknowledge the fact that innovation alone will not result in tangibly improved outcomes for our nation's school

children. Even with technological innovations that improve education, we must account for people whose investment, errors, and bias will create variability in the execution of a given innovation. Therefore, we must consider the question, “What leadership skills and beliefs are required to innovate successfully?”

After collecting competency data from approximately 5,000 leaders across various industries, Katherine Graham-Leviss (2016), a leading expert in talent analytics, summarized “The 5 Skills That Innovative Leaders Have in Common” for the *Harvard Business Review*.

Figure 3 illustrates the top competencies shared by innovative leaders.

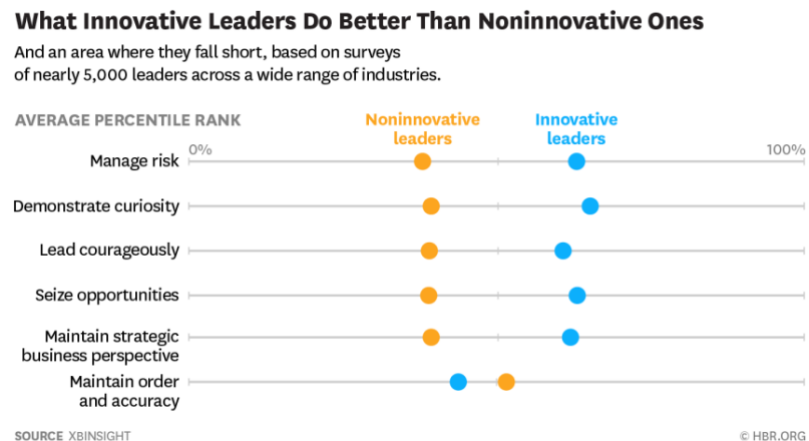


Figure 3. Comparison of Innovative and Non-Innovative Leadership Competencies, Source: XBInsight

To cross-check Graham-Leviss’ findings, I compared them to Robert Tucker’s 2017 *Forbes* article on the “Six Innovation Leadership Skills Everybody Needs to Master.” Table 1 maps the overlap between the innovative skillsets these two authors identified.

Table 1 *Comparison of Graham-Leviss' and Tucker's Innovative Leadership Competencies*

Graham-Leviss	Tucker	Definitions and Overlap
Manage Risk	n/a	Innovative leaders are adept at simultaneously pushing experimentation while managing potentially negative consequences and risks.
Demonstrate Curiosity	Fortify Idea Factory	Demonstrated curiosity is defined as a voracity and desire to know more and actively take in information in order to stay current and competitive. Fortifying the idea factory speaks to a leader's ability to generate ideas. Both skills necessitate the intake of information and dissemination of that information in a way that is useful for the innovation process and team.
Lead Courageously	Build Buy-In	Courageous leaders are compelling, proactive, and navigate tough decisions with decisiveness while acknowledging other team members' leadership qualities. Building buy-in is necessary to convince others that they should support your efforts. These skills speak to a self-assurance and ability to bring others along with you in your work.
Seize Opportunities	Opportunity Mode	Leaders that seize opportunities are proactive and they anticipate obstacles before taking action; they operate in the sweet spot between over-analysis and action. Opportunity mode thinking leaders are self-starters who see problems as opportunities and have the desire to take action to fill the gaps they identify.
Maintain Strategic Business Perspective	Think Ahead of the Curve	Maintaining a strategic business perspective means leaders have an acute understanding of their industry, the external environment, and their organization. Thinking ahead allows leaders to zone in on trends and disruptions within a given industry.

It is important to note that the last skill Graham-Leviss identifies, maintaining order and accuracy, is a competency that innovative leaders demonstrate less often than non-innovative leaders. When constructing their teams, innovative leaders must ensure that this skillset is present. The skillsets and competencies identified above help illuminate the ways Transcend can foster innovative leadership competencies internally, and it can inform how to support these same competencies in external partners.

Immunity to Change and Ambidexterity

With education initiatives and reforms in abundance, why are innovation and change not easily and successfully realized across all U.S. schools and districts? Two bodies of literature that examine organizational ambidexterity² and Immunity to Change³ shed light on the obstacles that stand in the way of innovation and change.

O'Reilly and Tushman's 2016 book, *Lead and Disrupt: How to Solve the Innovator's Dilemma*, introduces a business strategy that increases the likelihood of long-term success. They use the terms "explore and exploit" to describe situations where organizations facing change must do two things simultaneously that contradict each other: exploit current business assets through continuous and incremental improvement and innovation, and explore future markets the organization does not currently have a foothold in. The strategy of exploring and exploiting is difficult, and most businesses struggle to do both well because "exploitation emphasizes efficiency, productivity, and the reduction of variance, [while] exploration is the opposite, demanding search, discovery, and increased variance" (p. 94).

O'Reilly and Tushman also name a conundrum that the education and business sectors both fall victim to, the status quo: "In the short term, there are almost always compelling reasons to stay with the status quo" (2016, p. 102). They note that ambidextrous leadership requires leaders to be forward thinking, to see around the next corner in a given

² "Organizational ambidexterity refers to the ability of an organization to both explore and exploit—to compete in mature technologies and markets where efficiency, control, and incremental improvement are prized and to also compete in new technologies and markets where flexibility, autonomy, and experimentation are needed." (Tushman & O'Reilly, 2013, p. 324)

³ Immunity to Change is a theory developed by Robert Kegan and Lisa Lahey and define an immunity as a hidden commitment that prevents a person from changing their behavior. The Immunity to Change maps helps reveal a person's "immunity." The mapping process brings to the forefront four things: (1) a person's commitment to change, (2) behaviors that they are doing or not doing, (3) the hidden or competing commitments that hold the immunity in place, (4) the big assumptions a person has that prevent change. With this immunity map present, a person is able to test their big assumptions in an effort to overturn their immunity to change.

field, and to run experiments specifically designed to destabilize the status quo (p. 94). They do not deny that ambidextrous leadership is complex and requires an understanding that successful exploring and exploiting requires “separate subunits for the two but also different business models, competencies, systems, processes, incentives, and cultures. In short, it requires different alignment” (p. 94). To summarize, ambidexterity requires a business to do two oppositional things very well and to run those opposing things in a way that allows both to thrive so that incremental improvement and radical innovation can have productive outcomes within one company. Ambidextrous leadership is a precursor to embedding ambidexterity as an organizational norm and capability. The authors argue that the orientation for ambidexterity must be “repeatable and not a one-off event,” nor should it rely on a “single individual rather than a process” (p. 139).

Orienting a business toward ambidexterity speaks to a shift from the status quo at an organizational level but not to how to stimulate individual change. Effectively shifting the educational status quo and persistent culture requires people to change their behavior and mindset in a manner that increases their self-understanding. The challenges we face in making education equitable and universally excellent and robust for all children is adaptive in nature. The immunity to change framework helps us navigate and understand the choices we make and, subsequently, how we can make different choices in order to change.

Robert Kegan and Lisa Lahey (2009) describe the imperative for Immunity to Change, highlighting the fact that adaptive challenges⁴ require a transformation in mindset while advancing through the stages of adult development. They state that “many, if not

⁴ Note that the term “adaptive challenge” will appear throughout this paper. It is borrowed from Heifetz, Grashow, and Linsky’s definition: a challenge or problem that “can only be addressed through changes in people’s priorities, beliefs, habits, and loyalties.” Put another way, it requires operating, learning, and thinking differently in order to effectively face a challenge (2009, p. 19).

most, of the change challenges you face today and will face tomorrow require something more than incorporating new technical skills into your current mindset” (p. 29). When offering a context to explain why people are inherently resistant to change, Kegan and Lahey describe our immunity to change as a protective system that, if explored, is likely to bring us into a deep and intimate engagement with our feelings, which can cause defense mechanisms to surface. “It is not change that causes anxiety; it is the feeling that we are without defenses in the presence of what we see as danger that causes anxiety” (p. 49). To help us confront our natural reaction to resist change, which is to replicate behavior that is rooted in self-protection, the authors offer three ingredients that will unlock our potential to move ever closer to successful change: gut, head and heart, and hand.

The first ingredient is described as a gut-level desire for change, which occurs when the need for change is tethered to a real source of motivation: “Gut feelings can prepare us to take action either because the cost of the status quo (to ourselves or others) has become intolerably high, or because we’ve experienced a burst of hope from seeing a way forward that was never clear before” (Kegan & Lahey, 2009, p. 213). The second ingredient for change is what we think and feel, thus the head and heart dimension focus on a new orientation taking root when a person challenges something that has made them think or feel unsafe. Finally, the third ingredient is the hand, or the work of actively making decisions that shift both your mindset and your behavior. In essence, “success follows from taking intentional, specific actions—the reaching hand—that are inconsistent with our immunity so that we can test our mindset” (p. 218).

To recap, our individual immunities that arise from self-protection can hinder our ability to think and behave differently from the norm in order to shift the education sector in a positive direction. If we are able to expand our own mental development and increase our

self-awareness of the assumptions we hold about ourselves and the world, we will be able to recapture energy that can be used to tackle adaptive challenges. As Kegan and Lahey explain, “energy that had been trapped in the immune system is now released and can be redirected to feeling increasing competence and control in our lives. New energy leads to new action, and a particular kind of action furthers the process of adaptation” (p. 217).

Shortcomings of Review of Knowledge for Action

Although the literature described above has been instrumental in helping to inform my actions and distill a clearer theory of action, most frameworks and literature do not account for the historical inequities that exist in the United States, the difference in public- and private-sector realities, or the perspectives of people of color. The proven and research-backed frameworks and literature on innovation, R&D strategy, ambidexterity, and Immunity to Change are largely authored by white academics. This lack of diversity omits a critical lens and creates a gap that I felt acutely while looking to match the most vetted research to my actions.

Specifically, ambidexterity is focused on alignment in the business sector, where resources are not as scarce as they are in public schools and education nonprofits. The luxury of having separate units to perform integrally critical yet divergent work is not a reality in the majority of our schools, where capacity is already strained and teachers and school leaders are expected to do more with less. The fact that some organizations can raise funds to do innovative work outside of what is normally funded creates an issue of inequity, wherein some learning communities get more and others get less. Furthermore, the Immunity to Change framework has many benefits that are rooted in behavioral and adult psychology; it does not acknowledge the historically white, dominant nature of the study of psychology and the subsequent conclusions that are drawn from it.

A person's ability to change by testing their big assumptions is powerful, and the crux of overturning an immunity is finding evidence that disconfirms such big assumptions. Immunity to Change does not address or account for the internalization of assumptions that highlight institutionalized or systemic racism, prejudice, or oppression. Said differently, if a person of color is hoping to overturn an immunity with assumptions that are rooted in the unaddressed systems of power, white dominant culture, and racism, they are likely going to find evidence that confirms rather than disconfirms their assumptions. While this is one shortcoming of the framework, it is still an insightful and useful tool for laying the groundwork for personal change.

Finally, the literature on innovative leadership competencies completely omits any mention of equity in leadership practice. In education, and arguably all professional sectors, this is a tremendous oversight that cannot go unmentioned. Education leadership that fails to focus on equity will perpetuate the status quo of low and underachievement for our nation's most vulnerable children. Understanding the shortcomings of the literature thus far, I added a section to my RKA that speaks to equity and used these gaps to test some of my assumptions about what it takes to lead innovatively with equity as a central focus.

Equity

I believe that innovation in education should be squarely rooted in shifting achievement, performance indicators, and life outcomes along the lines of race, class, and learning differences. The most recent TNTP report supports this belief, stating that

the hard truth is that we have also seen a lot of “innovation” that continues to fall short of our basic promise to students. All too often, “meeting kids where they are” becomes an excuse for holding persistently low expectations, and ineffective

“differentiation” means some students get less and never get the chance to catch up.
(2018, p. 50)

The merits and outputs of innovation must disrupt the system to serve those it currently does not serve well. Accordingly, it is critical to examine the literature on systemic racism and marginalization so that our innovations are not designed without consideration for equity.

I begin with the myth of racial inferiority, because it must be made abundantly clear that the difference in achievement between black students and their non-black peers is not attributable to some innate ability but to systemic factors that drive this divide. Lisa Delpit begins her book, *“Multiplication Is for White People”: Raising Expectations for Other People’s Children*, by stating that “many reasons have been given for why African American children are not excelling in schools in the United States. One that is seldom spoken aloud, but that is buried within the American psyche, is that black children are innately less capable—that they are somehow inferior” (2012, p. 3). Delpit describes several facts that debunk the myth of inferiority and explain the low levels of academic success among African American children:

1. Many poor African American students do not get taught—they are filling out worksheets, completing written exercises, and the focus is on discipline and not on teaching and learning.
2. We are all impacted by America’s “deeply ingrained bias of equating blackness with inferiority” (p. 9), which creates a self-perpetuating cycle of stereotype threat in students. Additionally, society at large is eager to identify African Americans with almost exclusively negative behavior.
3. The curriculum taught to our children does not resonate with them or highlight their assets in positive ways, and/or does not recognize the culture young people carry with them.

Delpit asserts that we cannot and should not allow gaps in expectations to lead to gaps in achievement, yet time and time again across the United States we see the impact that failure to teach, bias, and a disconnected curriculum have on the achievement of our most vulnerable children (p. 25).

“The Opportunity Myth” report verifies Delpit’s assertions. TNTP’s first two resources—grade-appropriate assignments and strong instruction—overlap directly with Delpit’s explanation of the non-teaching and non-learning that is happening in classrooms. Having high expectations for students and believing in their abilities speaks directly to Delpit’s assertion that no one is immune to the implicit and explicit messages that associate blackness with inferiority. I would argue that teachers’ expectations are directly tied to this deeply held bias in our culture. Finally, the need for a curriculum that resonates with all students is directly tied to TNTP’s idea of students engaging deeply in what they are learning; children will not put forth effort in things that require sustained energy and productive failure if the work in front of them is not of interest and does not relate to their lived experiences or who they are.

As mentioned in the introduction, the TNTP report cites high teacher expectations as the factor with the greatest impact on student achievement. In her research, Delpit highlighted the unaddressed yet deeply ingrained biases toward black people and blackness, which are directly connected to student outcomes and achievement. Understanding this truth, I would be remiss to not mention the impact white supremacy and racism have had in our country for generations, and how this unaddressed connection cannot be divorced from the inequities of our education system today.

The McSilver Institute for Poverty Policy and Research published a report in 2015 titled “Facts Matter! Black Lives Matter! The Trauma of Racism.” The three-part report outlined (1) research that supports an immediate end to systemic racial oppression by addressing power and privilege structures that perpetuate social inequity; (2) the trauma of racism and the confounding and cumulative injurious impact racism has on the lives of people of color; and (3) the importance of place and the connection between outcomes and

the location of one's community. The report starts by defining the trauma and impact of racism:

The trauma of racism refers to the cumulative negative impact of racism on the lives of people of color. Encompassing the emotional, psychological, health, economic and social effects of multi-generational and historical trauma, trauma of racism relates to the damaging effects of ongoing societal and intra-social-group racial microaggressions, internalized racism, overt racist experiences, discrimination and oppression within the lives of people of color.

When repetitive and unresolved, these experiences rooted in racism can create severe emotional pain and distress that can overwhelm a person's and community's ability to cope, creating feelings of powerlessness. For people of color, the burden of the traumatic experiences associated with racism is evidenced by the significant racial disparities in educational achievement, health, criminal justice system participation, and employment. (Lebron et al., 2015, p. 10)

Racism does not only impact student achievement, it directly and negatively impacts every aspect of life for people and children of color. Understanding this truth is a critical component that must be considered when designing for equity and innovating the future of school.

Acknowledging racism and understanding its grave impact without having a way to take action to counter it can feel paralyzing. Paulo Freire is a main contributor to the theory of critical consciousness; that is, the act of developing awareness and knowledge of inequitable systems in order to develop the agency to upend those very systems. El-Amin et al. published an article in *Kappan* magazine titled, "Critical Consciousness: A Key to Student Achievement," which summarizes critical consciousness as follows:

Freire realized that inequality is sustained when the people most affected by it are unable to decode their social conditions. Freire proposed a cycle of critical consciousness development that involved gaining knowledge about the systems and structures that create and sustain inequity (critical analysis), developing a sense of power or capability (sense of agency), and ultimately committing to take action against oppressive conditions (critical action). (2017, p. 20)

El-Amin and colleagues (2017) make the case for three promising practices schools can use to help students develop critical consciousness, which can have a positive impact on student achievement. The first is to teach the language of inequality so students are acutely aware and can recognize injustice and inequality. The second practice is to ensure that space is allocated daily within the school and the curriculum for students to interrogate racism. Finally, the authors assert that students should be taught how to take action once they have the language to do so.

Students' ability to intimately understand the systemic and racial inequities at play in their schools is a crucial step toward raising their critical consciousness and increasing their empowerment to overcome hopelessness, which is linked to overall student outcomes. Critical consciousness is one potential way for students and adults to begin to challenge and overcome the deeply rooted, often paralyzing reality of systemic racism.

Theory of Action

My review of knowledge for action was instrumental in the formulation and revision of my theory of action. Developing the vision and program for the school design incubator as my strategic project was expansive, with few boundaries around what it could or could not become. Childress and Marietta's (2017) problem-solving approach helped to pinpoint the problem the incubator would solve for the school founders and for Transcend, and was the first step I grappled with in determining the purpose of my strategic project. With an understanding of innovation, strategy, and the leadership competencies that foster innovation most effectively, I hypothesized about what I could directly influence as the coach of my teams of school founders. The literature on ambidexterity and immunity to change clearly highlighted the difficulty people have when navigating change. Our organization and the incubator experience ask the teams of founders to refocus their

thinking, from what led them to success in education to how those structures and systems will actually inhibit the success of future generations of learners. Finally, the literature on equity and critical consciousness deeply influenced the incubator program, and the intentional decisions I made in coaching and in designing the February inspiration and learning visit. My theory of action is as follows:

If I...	Then...
clearly define the problem the strategic project is seeking to solve.	educators will be increasingly convinced of their rationale for why they want to redesign their school with evidence around equity-centered beliefs.
capture data about what incubator founders find useful and inhibitive about Transcend's assets through coaching support.	educators will have experienced replicable activities and gained transferrable knowledge they can use in partnership with their own communities.
provide learning and inspiration experiences designed to fuel participants' conviction to redesign their learning communities with an emphasis on equity and intentional consideration of history and community contexts.	Transcend will have a baseline understanding of the inputs that help foster equity-centered innovative school design, which will enable us to more accurately quantify the impact of our assets and coaching.

Crafting my theory of action required making assumptions about the ways educators become aware of equity in their practice and make increased equity a priority in their belief systems. A weakness in anchoring myself in action that rested on the collective equity research in the RKA exists because I did not include research that touched on how belief systems and mindsets are formed in children and young adults and reinforced throughout adulthood. This makes it difficult to measure and subsequently conclude that mindsets or beliefs have shifted, other than through anecdotal self-reporting.

Description of Project

The Transcend School Design Incubator Pilot and the Transcend and Silicon Schools Fund Collaborative were the two projects I led during my time as a Transcend resident. The Collaborative was a partnership with school teams and leaders across the Bay Area that had the goal of supporting innovative thinking about the future and purpose of school. The goal of this 8-month partnership was to increase participants' conviction of the need to re-imagine schools in ways that provide key design experiences that are replicable for innovation and design thinking. The intended outcomes included prototyping and piloting a signature student experience, as well as articulating a clear and crisp future vision of school and a collective "case for change" that communicated a school's impetus for a redesign. The Silicon Schools Fund sponsored eight school design teams on this innovative design journey, with Transcend providing support, facilitation, and coaching.

Knowledge from the Collaborative helped to bring the Transcend School Design Incubator Pilot from idea to vision to reality. The idea for the incubator was born out of an opportunity to partner with highly motivated and self-driven school founders who sought out Transcend but did not fit into the current partnerships offered by the Dream and Discover team. The structure of the incubator included four key components that helped founders construct their school visions:

1. Put **school founders in the driver's seat** by helping them set goals and craft their own design journey.
2. Share access to **tools, resources, and methods** to shape founders' design process, develop innovative design skills, and spark new ideas about the design they ultimately create.
3. Offer **coaching and thought partnership** throughout the journey.
4. Help founders to curate various **virtual and in-person experiences** to expand and inspire their school vision (e.g., visiting innovative schools, workplaces, or learning spaces; connecting with other founders; virtual consultancies, etc.).

These components served to advance five key aims Transcend has identified as critical to innovative school model success:

- **Conviction:** The steadfastness and courage to reimagine school
- **Clarity:** A crisp and compelling vision and design for a new learning community
- **Culture:** Organizational norms and practices that support ongoing innovation, including trust, open communication, and risk-taking
- **Capacity:** A plan for assembling the people, time, skills, and resources to bring a vision to life
- **Coalition:** Strong relationships and a shared vision with students, families, educators, and community members who will ultimately make up a new learning community and carry the vision forward

In the first phase of the incubator, the founders prepared themselves for the design journey by setting goals, mapping their milestones, and building their design teams. In the second phase, they began rolling up their sleeves to design their future learning communities by engaging in activities that deepened their understanding of all stakeholders' aspirations and lived experiences, exploring cutting-edge learning science and future trends, and prototyping big ideas.

Goals and Questions for the Strategic Project

Transcend's R&D agenda targets 22 questions to explore this year, with three questions overlapping the strategic project:

- **Q9:** What local conditions are required for communities to undertake each of the R&D processes?
 - What processes and tools can help school operators improve their conditions for innovation?
- **Q15:** What are the most impactful ways for us to engage communities—directly and indirectly—so they can benefit from our core engine assets (our people, knowledge, and networks) to advance their innovation journeys?
 - Who might we partner with to see the benefits and shortcomings of our knowledge assets?
- **Q18:** What is the right economic model for Transcend over time?
 - What is the cost to Transcend of running the incubator and what funding models make sense, given our target participants and the varying contexts across the nation?

With these questions in mind, the goals and benchmarks for the success of the strategic project emerged:

Short-Term Goals (September-November)

1. Engage in disciplined entrepreneurship to build the market research to inform decisions for the incubator.
2. Clarify an outward facing vision and purpose for the incubator, how it works, and what participants should expect.
3. Secure ~6 pilot participants (i.e., school founders, design teams, etc.) for the incubator that are within 1-3 years of school launch or are seeking to re-imagine their current school model. Participants should represent a mix of traditional and nontraditional education settings.
4. Design a vision and strategy for coaching and support of participants in phase 1 of the incubator (design-team led exploration with light coaching) and in phase 2 (more hands-on, intensive approach to coaching and building the school design).
5. Create a method that helps design teams investigate and clearly articulate the theory of learning that will undergird their innovative school design.

Short-Term Benchmarks (November and December)

- Three design teams have completed the initial 3-month window (phase 1) for the visioning process of the design journey and have made significant progress toward self-identified milestones 1 and 2 within this window.
- Diagnostics have been captured on factors for innovation (political conditions, leader competencies).
- More than 50% of teams have applied to become designers-in-residence because they are invested in the value-add Transcend provides and want additional help finalizing their school vision.
- We have invited at least one design team to join us for the remainder of the year (phase 2), after the application process.
- 100% of participants feel they've been exposed to useful tools and partnerships, and they are highly satisfied with Transcend.

Long-Term Goals (December-April)

1. Ensure that all participants have an excellent experience with Transcend that increases their key innovation competencies: empathy interviews, equity reflection and auditing, future trends, understanding the tenets of learning science and how people best learn, etc.
2. All participants will have created two outputs that capture and operationalize their vision—the dream canvas and the operationalized innovation and change plan that outlines the next 1-5 years of how to bring their vision to a reality. These outputs ensure that conviction, clarity, coalition, capacity, and culture are embedded in their plan and vision.

3. A percentage of pilot partners become a Tier 2 partner (coaching and developing, including periodic stretches where we “hold the pen” or do direct building).
4. A percentage of pilot partners become a Tier 3 partner (all of Tier 2, plus Transcend performs key aspects of the R&D work (e.g., research, design and build, project management, etc.) on a sustained basis.

Long-Term Benchmarks (May/Jun)

- At least one design team has completed the full incubator experience.
- Data has been captured on key capstone questions and factors for equity-centered innovation.

Initial Planning and Pivots

Armed with experience participating in Harvard’s Venture Incubation Program and a class on disciplined entrepreneurship taught by Bill Aulet at the Massachusetts Institute of Technology, I initially approached the incubator as a straightforward process of following a prescriptive set of actions new businesses take: researching the current landscape, conducting informational interviews, comparing competitors, and drafting Transcend’s value proposition, then moving into identifying users and the total addressable market, and defining and creating our minimum viable product.

By the end of August, it was clear that executing my neat and linear plan for creating the incubator would not work. The nature of a start-up is that things happen quickly, and having a long window of time to plan ahead feels like a luxury. When I came on board in July, the leaders in my organization were already in communication with three potential incubator founding teams, and the pace of these conversations accelerated the timeline for creating a vision for the incubator. I pivoted from my initial plan and worked alongside three team members to brainstorm on our vision for the incubator. The program overview we agreed to, alongside the RKA, drove the actions and the strategy we implemented in the first phase of the pilot (see Appendix C for Incubator Overview).

Planning and Implementing Phase One of the School Design Incubator Pilot

The first phase of the incubator put the founders and their teams in the driver's seat by offering the use of our beta-version⁵ school design toolkit, which served as their guide in setting goals and milestones for our work together. In the kick-off calls, we walked founders through the toolkit and asked about the goals they hoped to accomplish and the milestones that aligned with their respective needs.

In early September, I held kick-off meetings with founders starting schools in Bremerton, Washington, and San Antonio, Texas, while a colleague led the meetings for our third founding team in New York City. The initial coaching meetings focused on diagnosing the needs of each team and directing them to different resources from the toolkit that would help them determine their goals. In these early incubator meetings, the founders articulated the following goals for the work they wanted to engage in alongside Transcend for the first three months:

September, 17, 2018

- Team #1: "We are most focused on writing our charter but have enough support for that. What is driving us right now is doing deep, thoughtful, authentic community engagement and working hard to think about how we design in the margins and NOT designing in our view, but instead with a community we cultivate and build out as a design team."
- Team #2: "We have done a lot of work with the community and need to clarify what it looks like to grow our social-emotional program where elementary-aged kids build soft skills. We are also thinking about personalization and have restricted funding with 1:22 [one teacher to 22 kids] a big question is how we build on our kids' passions and give them the attention they need."

September 19, 2018

- Team #3: "We are looking for guidance and resources in thinking through a truly authentic community engagement plan, thoughts on an advisory council and what that means but we are not sure of how to construct it, and we are excited to engage in the Dream Canvas [work] but we are not very far along that journey in terms of defining graduate aims and building a crisp and concise vision."

⁵ This version of the toolkit codified the school design methods (activities and guidance that was given to design teams to help with their early-stage visioning in the Collaborative) and made them accessible to a small number of external partners.

Subsequent coaching meetings were led by the founders, which allowed them to focus on what would be most useful for them. As the team liaison and coach, I was responsible for identifying areas of leadership or content that could benefit from additional Transcend staff expertise. While the coaching meetings seemed to go off without a hitch, September was also the month when the squeeze for time felt most pronounced.

On September 24, 2018, at the first return to campus visit⁶, I sat down with my supervisor, Dr. Erickson, to discuss the feasibility of carrying forward our team's two largest pilots (the Silicon Schools Fund and Excellent Schools New Mexico), to design the incubator, and to have enough space to step back to reflect on and write about my leadership in my capstone. I said to Dr. Erickson that "the urgency to focus on the pilot projects was more pressing than the incubator because it has a clearer roadmap [replicating the previous Collaborative], it doesn't require making something from scratch, which is proving to be challenging, and I don't want to let anyone down, given [that] it's my first time leading work [where] a sum of money is exchanged in return for work." Dr. Erickson agreed and said, "We can find a way to balance the work by taking you off the lead for Excellent Schools New Mexico." After reflecting together, we agreed that prioritizing our paying partner-facing projects while balancing incubator work is difficult and is exactly the dilemma defined as ambidexterity. Dr. Erickson agreed that "more space and time needs to be created for the incubator, and you should build a small design team to help you move work the forward." We then mapped out the high-level responsibilities for each project and the percentage of my time I would spend on each (see Appendix D).

⁶ During residency, our cohort returns to campus three times to check-in with faculty and program staff to ensure we are on pace with all requirements for residency and capstone writing. The first return to campus visit included our supervisors.

In early November, I was able to turn my attention to a new plan for getting the incubator program design up and running. I partnered with Dr. Erickson to construct a small design team, using the guidance O'Reilly and Tushman (2016) provide on ambidexterity. My goal was to disrupt the echo chamber I found myself in when I tried to design alone and to collaborate using our team's varied expertise. I next drafted a timeline and new project plan that guided us toward our key milestones and the opportunities we could explore to strengthen our work, with the internal design team (see Appendix E for Milestones/Project Plan).

I closed the year busy with planning the first inspiration and learning visit with the incubator founders and other educators, which was scheduled to take place February 7 and 8 in Washington, DC. After the New Year, a bustle of activity clustered around finalizing plans for this visit while simultaneously juggling the final preparations for our second Transcend and Silicon Schools Fund Convening in mid-January

Evidence to Date

Designing and launching the School Design Incubator Pilot with three driven school founder teams allowed Transcend to build a partnership with a group of stakeholders whom the organization had great interest in engaging with and learning from. The decisions made throughout the strategic project were greatly informed by our work with the Transcend and Silicon Schools Fund Collaborative and the three convenings put on during the year. Specifically, the incubator was used as a testing ground for the Dream and Discover team to better understand how our school design resources might be used with new target customers. We also used the incubator space to build out the ways equity could be strengthened in the design process. The culmination of the strategic project, the inspiration and learning visit, tested whether it would be useful to have experiences like a two-day touchpoint with educators where they are exposed to a key area of the school design content, without a long-term commitment to work together. The evidence below shows great promise and positive momentum towards the outcomes identified for the project. Given the short timeline for residency, more time is needed to better understand the long-term effects of the strategic project. To that end, in the “implications for site” section, I will recommend further action that can be taken to substantiate the impact of the strategic project.

In my RKA, I indicated that three bodies of literature—on innovation and strategy, on ambidexterity and immunity to change, and on equity—would inform our actions, and this literature will be woven throughout the analysis. The results of the incubator pilot will be appraised using the three theory of action “if” statements, followed by the three “then” statements, in sequence.

“If Statements”

1. **Clearly define the problem the strategic project is seeking to solve.** After coming on board in July and attending a handful of key meetings with senior leaders about the vision for the incubator, I created a project plan that used Bill Aulet’s, *Disciplined Entrepreneurship: 24 steps to a successful startup* (2013) framework that new businesses use to guide them from vision to launch. To start, I conducted two informational interviews with educators that worked for or participated in a school design fellowship. I asked questions to elicit the value they felt they gained from the programs and what they felt they needed but did not have sufficient support for (see Appendix F for Informational Interview Questions). Although the process of conducting interviews was cut short, it allowed me to hear about the initial value these leaders could see in an innovative school design program. One interviewee stated, “School founders get really innovative, but [only] within the framework of schools they have already seen. Very few people are thinking about what schools should look like in the future.”

With limited background knowledge and impending meetings scheduled to kick off the incubator, Dr. Erickson and I together distilled down the purpose of the incubator during a meeting on September 13, 2018. We landed on the following description of what the incubator sought to accomplish:

Purpose of the Incubator for School Designers: Help highly successful and entrepreneurial educators by giving them access to a set of tools and a process to help them re-imagine schools in a way that pushes their thinking on what’s possible and sparks new ideas. The experience will help people become design-centered thinkers who place equity at the center of their work.

Purpose of the Incubator for Transcend: Take the tremendous amount of knowledge Transcend has gained and increase the number of communities that can envision a radical new school model. Internally, this is an opportunity to test boundaries and stretch ourselves in a place where we have space and room to play, and to improve our own visioning process, specifically in the role equity plays throughout the design process.

In sum, drawing from the literature in the RKA, I clarified the two-fold problem the incubator pilot sought to solve: to understand how our school design visioning tools and coaching can be helpful for new school founders, and to clarify how equity-centered innovation can live within the visioning process.

2. Capture data about what incubator founders find useful and inhibitive about Transcend’s assets through coaching support. One key question the Dream and Discover team sought to answer through our pilots this year is, “What tools, resources, and experiences do partners need in order to experience success in their D+D journey?” (R&D Agenda, 2018). As the first outside users of the beta-version toolkit, the incubator founders delivered valuable feedback to our team. They stated that the toolkit was “easy to navigate and [they] enjoyed seeing the templates as examples” (Coaching Meeting, October 3, 2018), although “at times the toolkit is overwhelming and I found myself clicking around a lot, and then I would go somewhere and open multiple links and then forget how I got there” (Coaching Meeting, October 9, 2018). Another theme that came up for all the teams was time. One founder stated that she had to “pare down the activities that were used . . . to allow for the time available,” because the recommended time estimate of 2-3 hours for some activities was not realistic for founders who had limited time to engage with other stakeholders (Coaching Meeting, November 5, 2018). Founders also suggested that we add a search function to the toolkit and a personalized workspace that would enable them to drag and drop resources that were user-specific.

In addition to the toolkit, monthly coaching support and check-ins helped the teams make progress toward their established goals and milestones. One team’s main purpose was to learn ways they could engage with their community in order to design collaboratively with families and community members. (See Appendix G for example of team milestones and

design team insights). One team shared with me on October 29, 2018, that their first community design team meeting “literally took 15 minutes to plan and we didn’t need to re-work it or change it to fit our needs” (see Appendix H for email communication).

By and large, our toolkit was given positive reviews about its thoroughness and the ability it gave them to cut and copy items to use in design team meetings. Founders shared that the tools were most useful with direct guidance because the amount of information they had to sift through made it difficult to know where to begin and how to anticipate what came next. A task I took on during coaching was to fit the pieces together to form a narrative arc so that the cognitive overload of dozens of links and learning methods did not stall our work (see Appendix I for an example of next steps that provided guidance to navigate the toolkit). The early evidence indicates the formation of a value proposition⁷ that includes saving time by using Transcend resources and pinpointing the ability to help leaders create designs in collaboration with their communities. One founder shared, “The resource of time is real and we never would have been able to develop strong learning activities to engage our community on our own” (Check-In, February 16, 2018).

3. Provide learning and inspiration experiences designed to fuel participants’ conviction to redesign their learning communities with an emphasis on equity and intentional consideration of history and community contexts. For the culmination of the strategic project, I designed and hosted an inspiration and learning visit to Washington, DC, for 20 educators, which aimed to achieve two outcomes: to help educators begin to build a lens for inclusive design that incorporates the rich history and culture of their

⁷ Defined as a “company’s core promise of benefits to clients and prospective clients” (Doyle, 2011)

communities, and to give educators practice using the science of learning and development by observing a school setting and debriefing on the implications of what they observed.

Before the visit, all participants completed a survey that gathered baseline information about their understanding of equity. On the survey I asked, “What leadership competencies are most important in leading innovation in schools?” This question sought to test the hypothesis that equity-centered knowledge and practice are competencies critical to a leader’s ability to innovate, despite the absence of this hypothesis from the business literature in my research. The ten competencies participants ranked were pulled directly from the RKA, with the addition of equity consciousness, or “how aware or mindful people are as to whether others around them are receiving fair and equitable treatment, how well they understand the phenomenon of inequity, and how willing they are to become involved in solutions” (McKenzie & Skrla, 2009, p. 12). The survey participants named the following competencies as most critical for leading innovation: strategic vision (93%), equity consciousness (93%), seizing opportunities (80%), leading courageously (67%), and building buy-in (67%). While the survey participants are a small subset of educators, the survey results confirmed the hypothesis that equity consciousness is a skill education leaders believe is critical for leading innovation in their respective settings (see Appendix J for participant rankings and the full definitions of each leadership competency).

In planning the visit, I used Paulo Freire’s work on critical consciousness as a frame to design an experience that could foster “critical thinking,” defined as questioning information and knowledge with healthy skepticism. Freire believed that critical thinking is needed to resist oppressive systems, and that it “allows people to gain an understanding of who creates knowledge and who benefits from that knowledge within systems of oppression” (Newark Community Collaborative Board, n.d.). The inspiration and learning

visit and the equity activity were designed with the hope that the participants would start a dialogue about the importance of designing with equity and inclusion at the forefront (see Appendix K for the intentional equity lens that contributed to each portion of the program; see Appendix L, for artifacts from the equity activity).

Equity drove the planning and program design throughout my residency. I substantiated my hunch that equity consciousness is a skill other education leaders believe is critical to leading innovation in the sector. With that understanding, I used critical consciousness as the backbone of the equity activity, which was intentionally designed so that each part of the inspiration and learning visit was connected to equity.

“Then” Statements

4. Educators will be increasingly convinced of their rationale for why they want to redesign their school with evidence around equity-centered beliefs. To show progress toward designing around equity-centered beliefs, I share data from a step-back conversation with an incubator team, anecdotal data from the inspiration and learning visit, and a work product that came out of the equity session from the second convening with the Silicon Schools Fund cohort.

On February 14, 2019, I completed a step-back with two incubator founders who are opening a school in Washington State. When asked, “Have you built your skill or mindset around equity-centered design in the incubator? If so, how? If not, what might you have needed to do so?” the first founder stated that she has been engrossed in equity work for at least a decade and, while unsure if her mindset has shifted, she said that her “aperture has opened more by doing this work and by using the tools of Transcend.” The second founder underscored this idea of an opened aperture and stated that conducting design team meetings with community members and including voices that are not typically at the

decision-making table had spilled over into how they run their board meetings and whom they invited to be on their founding board. She said,

we made a clear decision that we wanted our board meetings to run with equity front and center, so we have been building in different places to bring [in] all voices equally in all of our board meetings . . . We tried to be really intentional and the work with Transcend has helped us keep that more front and center than we would have normally.

In sharing their rationale for why they want to redesign school, these founders shared that their community and many others are still preparing kids for industrial era schools, and that “in our most resource plenty places we are still getting kids ready to go to work for a very traditional workplace, and what we did in the 20th century is not going to work for what will happen in the 21st century.” These leaders added that they “live in a place of deep complacency and deep acceptance of what is, and there is no intentionality about what comes next.”

Survey responses before and after the inspiration and learning visit provided additional evidence that equity-centered beliefs were being activated (see Appendix M for anecdotal survey information). Participants shared their reactions to the learning they experienced in the 48 hours we spent together, including the following:

We are hoping to open [our school] in one of the poorest zip codes in San Antonio. Over the course of 2018, I visited over 30 schools in low-income communities and have been taken aback by the non-developmentally appropriate practices and harsh disciplinary standards in these communities. Our kids deserve so much more, and we want to be as thoughtful as possible in designing an educational environment that is aligned with the developmental learning needs of our future students.

Finally, the third output that indicates progress toward equity-centered beliefs based on intentionally designed learning experiences comes out of a convening of educators in the Bay Area. Eight design teams engaged in reading and discussion that helped them identify equity gaps in their organizations using the first input, a text by Tema Okun and Kenneth Jones on “The Characteristics of White Supremacy Culture,” based on *Dismantling Racism: A Resource Book for Social Change Groups* (2003). The second input was an equity assessment rubric adapted from Funders for Lesbian and Gay Issues. Team members marked which of four categories—equity-neutral, equity-conscious, diversity and inclusion, or structural equity—they felt best represented their organization (see Appendix N the 15 categories from Okun and Jones and the equity assessment rubric).

The outcome of this equity session yielded eight statements that identified the most pressing equity gap each design team observed in their organization. The statements were then used as one frame to audit each team’s vision for a redesigned school they were creating. Some of the most powerful equity-gap statements are shared below:

We have oversimplified complex equity issues by

1. not creating space to encourage and allow difficult conversation to occur; and
2. expecting our kids to fit into our box, and we have not yet created flexibility for differences.

Our school is generally conscious of equity; the adults on campus are well-intentioned and aware of the academic needs of our students. Yet, mistakes are seen as personal, as opposed to being seen for what they are, and a continued sense of urgency makes it difficult to be thoughtful in decision-making.

Our organization believes in equity, attracts people that believe in equity, and intentionally places schools in neighborhoods that lack equity. Under the guise of reaching high measurable results, we value order, systems, speed, and what's probable over intentionality, patience, and what is risky and possible.

Because of a school culture that resists change and self-reflection and because of a lack of awareness of our bias, our organization consistently resists addressing the inequities that affect our students and school community.

Crafting an equity imperative allowed teams to make explicit that which is implicit and covert in their school culture. This explicitness empowers the leaders and other members of the organization to make design choices and organizational decisions that contradict the dominant white cultural norms, and instead uphold the competency of designing with consciousness of equity. In a message sent on January 24, 2019, a veteran educator from the Collaborative shared how his conviction to redesign school has shifted: “I just wanted to give both of you a more targeted thank you for rekindling my belief to reach for what’s possible instead of settling for what’s probable. Your insights, questions, and confirmations were very appreciated. Thank you for being thought partners and sounding boards.”

5. Educators will have experienced replicable activities and gained transferrable knowledge they can use in partnership with their own communities.

Curating experiences for educators that spark inspiration and learning is something I deeply believe they should find easily transferrable and replicable once they return to their school communities. To that end, we have intentionally anchored the design of our program experiences with criteria that guide our design choices (see Appendix O for summary of intentional design choices).

Two pieces of evidence highlight how the replicability of these design choices impacted our partners in the work. In a step-back meeting with one of the incubator teams, a founder shared how invaluable the power of a diverse design team has been in raising the voices of the people who are not normally a part of the design and decision-making process of their community schools. The founder shared that it has been powerful to witness the “use [of] protocols that allow other people to feel what it feels like to have patterns that are dominant get disrupted” in such a way that it allows voices that were traditionally silenced or not invited to the table to come to the fore.

On February 18, 2019, I received a message from an assistant principal in North Carolina who shared that she was inspired by the equity session I designed in Washington, DC, and had incorporated pieces of what she witnessed into her school’s Black History Month celebration. She explained that she wanted to share with her students the concealed stories of their school’s past and wanted her children to hear the personal stories of alumni. She partnered with the school’s alumni association and invited a handful of graduates to speak to her student body about what it was like to go to Phillips and what the school meant to them at a time when the same building they were in was the community’s former “black grade school.” “The students were silent and so engaged listening to the history of their community,” this assistant principal stated. She closed the program using Langston Hughes’ “I, Too” (1926) as a call to action for her students to embrace their excellence and the history of their greatness, and use them to believe in themselves and their ability to change the world.

By modeling learning experiences with a lens focused on equity and giving participants easily replicable tools that promote critical thinking, the incubator founders were able to solidify their commitment to bring historically silenced voices into their process, and

an assistant principal was able to seamlessly and powerfully highlight the hidden stories of her school's past.

6. Transcend will have a baseline understanding of the inputs that help foster equity-centered innovative school design, which will enable us to more accurately quantify the impact of our assets and coaching. The evidence after four months of collaboration shows early progress toward positive equity outcomes achieved using Transcend's tools, although accurately understanding the lasting impact of the strategic project will require a longer timeline. Recommendations for further outreach and data gathering will be shared below in the "implications for site" section.

In sum, organizing myself and my teams to (1) clearly define the problem the strategic project is seeking to solve; (2) capture data from partners about what is useful and inhibitive about Transcend's assets and coaching support in order to begin to define the value proposition of the incubator; and (3) procure learning and inspirational experiences aimed at fueling participants' conviction to redesign learning communities that are deeply rooted in equity, produced the following outcomes:

1. Educators conclusively identify equity consciousness as a top leadership competency necessary to lead innovation in schools, despite this competency being absent from the innovation and business literature.
2. Anecdotally, the most successful incubator team to date has credited work with Transcend for reinvigorating their commitment to equity and keeping it at the top of their minds in such a way that it impacts how they engage with the community and their board.
3. Learning and inspiration activities have increased participants' attentiveness to the ways inequities have persisted, and provided a lens and language for educators to clearly articulate where their organizations are falling short of honoring the diversity of all people, and their students most acutely. Evidence is still forthcoming about whether these activities will clearly impact the final design and school vision in a way that actively counters perpetual systems of dominance and the dominant white culture.
4. Equity activities' ease of replicability has shown early indications that educators can turn around what they experience and use it directly in their communities in an impactful way.

5. Transcend's tools, assets, and approach to coaching save time for leaders and allow them to bring others alongside them in the design process more easily

Analysis of School Design Incubator Pilot

Overview of Frameworks

Organizational culture. Robert Quinn and John

Rohrbaugh (1983) created the Competing Values

Framework (CVF) as part of their work on organizational

effectiveness. The CVF structure falls into four quadrants,

with the horizontal axis representing the dimension of

focus (internal maintenance to external positioning) and the

vertical axis representing structure (individual flexibility to

stability control). Figure 4 shows an overview of the four culture types:

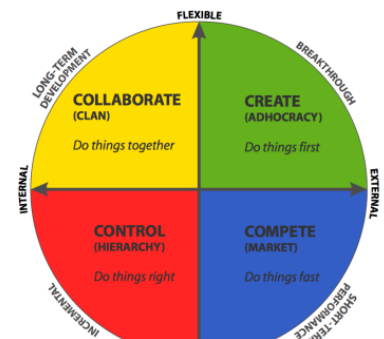


Figure 4. Competing Values Framework (CVF) Overview,

Source:

<https://essayfreelancewriters.com/blog/competing-values-framework/>

1. **Clan culture:** places a premium on people and collaboration, where the culture feels familial instead of competitive
2. **Adhocracy culture:** is flexible, informal, and adaptable, where decisive action is favored over formal authority; the intention is to reduce or remove bureaucracy from the organization's policies and procedures
3. **Market culture:** emphasizes competition, where the "primary belief . . . is that clear goals and contingent rewards motivate employees to aggressively perform and meet stakeholders' expectations" (Hartnell, Ou, & Kinicki, 2011, p. 679)
4. **Hierarchy culture:** emphasizes structure and control, where clearly defined roles and expectations are believed to yield success

Using CVF as a grounding framework helped me to understand the implicit and unspoken

nuances of Transcend's organizational culture, which also helped to underscore and clarify

some of the successes and failures of the incubator.

Ambidexterity. As I step back to analyze the successes and moments of learning I experienced during the strategic project, ambidexterity most clearly explains why balancing opposing work is challenging. As described in the RKA, ambidexterity is a business strategy that has been shown to increase the likelihood of longer term success by doing two opposing things well: exploiting the current business and exploring opportunities in future markets. As Figure 5 depicts, across the measures of strategy, culture, risk, success, etc., there is great variance between the explore and exploit organizational alignments. This variance foreshadowed the hypothesized difficulties I encountered with the strategic project.

EXPLORE VS EXPLOIT MINDSET

	Explore	Exploit
<i>Strategy</i>	Radical or disruptive innovation, new business model innovation	Incremental innovation, optimizing existing business model
<i>Structure</i>	Small cross-functional multi disciplined team	Multiple teams aligned using Principle of Mission
<i>Culture</i>	High tolerance for experimentation, risk taking, acceptance of failure, focus on learning	Incremental improvement and optimization, focus on quality and customer satisfaction
<i>Risk Management</i>	Biggest risk is failure to achieve product/market fit	A more complex set of trade-offs specific to each product or service
<i>Goals</i>	Creating new markets, discovering new opportunities within existing or adjacent markets	Maximizing yield from captured market, outperforming competitors
<i>Measure of success</i>	Achieving product/market fit	Outperforming forecasts, achieving planned milestones and targets

Humble, Molesky and O'Reilly, *Lean Enterprise: How High Performance Organizations Innovation At Scale*; pg. 25

Figure 5. Explore versus Exploit, Source: <https://barryoreilly.com/lean-pmo-explore-vs-exploit/>

My analysis of the incubator project and of my time as a resident begins with an overview of my successes and lessons learned, and it closes with the personal and organizational factors that explain why things happened as they did.

Successes

Collaborate and go further together. The Dream and Discover team was composed of eight team members, five of whom worked full-time on the team. The team ran six different pilot projects during the 2018-2019 fiscal year. The first major success of my residency occurred when working with this dynamic group of people: I learned the irreplaceable value of collaboration and how to release some aspects of control in order to fail and pivot faster.

Joining Transcend, an organization whose core business was beyond the scope of the work I had so far done in my career, presented a new opportunity for me to lean into practicing active team collaboration. While I have always valued teamwork, the urgency of my previous work—the need to act, problem-solve, and execute the great and beautiful responsibility of caring for the children coming into the school building every day—precluded me from developing this skill to the level I knew was necessary. Learning to break old habits is a lesson I learned slowly and somewhat painfully, as the fast-paced, virtual nature of the organization actually reinforced the need to go at things alone and in siloes, rather than active and robust collaboration. Despite wanting to collaborate early and often, I recognized that other factors were hindering my ability to be clearheaded enough to engage with others in my process.

In their primer titled *Designing for Learning*, Jennifer Charlot, Cynthia Leck, and Bror Saxberg (2018) summarize the key insights of the growing body of literature on the science of learning and development. The primer identifies four factors (cognition, identity, motivation, and individual variability) that are broken down into 16 principles. Using this information, I was able to understand that part of the reason collaboration felt like a luxury to me, both in the past and upon joining Transcend, was due to the cognitive load I was

navigating. I felt like I was drinking from a water hose, and the idea of doing anything other than putting my head down to try to process, learn, and do things faster felt impossible. In *Designing for Learning*, Principle #2, Manageable Cognitive Load, states that “people learn best when they are challenged but are processing a manageable amount in their working memory” (p. 9). By design, a residency is meant to be challenging, but I would characterize the first two and a half months of mine as a constant state of learning, confusion, and paralysis, because the cognitive load was too high and I was simultaneously adjusting to many new circumstances. I found myself unable to articulate how I could be helped or what I needed help with. I opted to fall back into my old habit of putting my head down and working harder to try to fix it on my own. This was a major mistake.

Looking back, I recognize that the personal and organizational contributors to this feeling included needing to learn new content while navigating personal obstacles. Below is a list of the challenges I faced:

Personal	Organizational
<ul style="list-style-type: none"> • Internal doubt about my ability to perform well in a new organization and in work that was also new • Waiting too long to ask for help • Navigating multiple changes: moving across the country, being far away from my family and core friends • Visioning work and design thinking work is different from execution work—I was leaning into a learning edge throughout my residency • Hesitance to lead with conviction because the content was not something I had firm mastery of 	<ul style="list-style-type: none"> • Working for a virtual organization was an adjustment that necessitated learning to work differently (e.g., scheduling meetings to discuss things you might otherwise ask in passing) • Meeting online reduces physical activity in a given day; understanding what my body and mind needed to sustain being productive while tied to a computer • It was hard to learn simply by reading about things versus doing or seeing them • Core value of perpetual beta, or stance of being learners that seek to grow and improve, leads to feelings of always revising or improving instead of knowing when it's good enough

Getting unstuck was a critical lesson for myself as a leader.

In a reflection after the first convening of the Transcend and Silicon Schools Fund Collaborative in late October, I journaled that my previous experience was fully absent from the way I had facilitated, how I led my team to design the convening, and the overall approach I used to construct the experience. This was a turning point in my leadership, because reaching this critical milestone while swimming through the newness all around me helped me pinpoint the fact that I falsely thought that, because the context and content were all novel, I could not lean on my past experiences designing and leading adult learning. At this juncture, I knew it was necessary to engage my past experience and dominant skill in order to lead more confidently moving forward. Without having the language, I began taking a more intentional approach to collaborating with others, and to getting out of my head when leading alongside my project teams and the Dream and Discover team.

At the beginning of November, I made several conscious decisions about how I was going to lead differently. I committed to (1) giving myself permission to be less rigid and planned, and to allow much more flexibility in the interactions I had with teammates and incubator design teams by releasing myself from the self-imposed expectation that I had to have the answer or that what I shared had to be polished and final; (2) embracing my natural tendency to play the role of facilitator and team builder by leading through inquiry, providing fodder for discussion, and allowing the brilliance of others to organically come to the forefront; (3) allowing others to take the lead in areas that were not my strong suit, or in places others were best positioned to lead the work because it involved their dominant set of skills. Using CVF, my new leadership commitments were coincidentally well aligned with the top left quadrant, where collaboration is the anchoring orientation of the team's culture.

The culmination of my strategic project presented the perfect opportunity for me to dive head first into my leadership commitments, as I was planning and leading a two-day

learning and inspiration visit to Washington, DC. Before I began planning, I mapped out all of the meetings I anticipated needing to have with other team members to brainstorm, get input, or allow them to take a piece of the project and run with it. Through informal channels like car rides during team retreats, I communicated earlier and more often about the plan I was starting to form for the visit, and I got great feedback and food for thought. In every aspect of the planning and program, I had the help, advice, and support of my teammates. When all was said and done, the visit had the imprint of contributions from seven different colleagues, and as a result, the entire experience was more thoughtful, robust, and fun because others' strengths were leveraged in the areas where I had deficits.

Leading through ambiguity using ambidexterity. Facing ambiguous adaptive challenges requires navigating conflicting truths. You must have a vision that helps guide you but does not eclipse your ability to pivot or to throw the vision out if it is not working. You must never be so invested in a plan or product that you resist iteration. You must communicate clearly enough to allow your colleagues to understand the essence of the mission while allowing enough room for co-creation and co-leadership. You must create a way to collectively get from point A to point E, while being ready to be led to places you could not imagine and are likely unprepared for. For me, the tension of leading into the unknown was often like leading blindly, until I stopped being a bystander to the journey of adaptive ambiguous challenges and shifted my stance to become the driver. Learning to lead ambidextrously and becoming ever more comfortable navigating conflicting truths was the second major success of the strategic project and of my residency.

The book *Lead and Disrupt: How to Solve the Innovator's Dilemma* (2016) shares five principles associated with successful ambidexterity, three of which served as my “North Star” as I actively shifted my leadership stance:

1. Engage the senior team around an emotionally compelling strategic aspiration.
2. Choose explicitly where to locate the tension between exploring and exploiting in the organizational design.
3. Confront tensions among senior team members instead of avoiding them.
4. Practice consistently flexible leadership behaviors.
5. Allocate time to discuss and adapt decision-making practices for explore and exploit businesses. (O'Reilly & Tushman, 2016, p. 194)

In learning to lead ambidextrously, I made the key decision to integrate principles one and two, which enabled me to share my compelling strategic vision for the incubator while explicitly tagging the areas of tension as opportunities to explore. On my first return to campus visit, I met with Dr. Erikson. During our meeting, I shared the four big bets or, the areas of opportunity within our work that could get more clear with exploration. I thought the incubator could be a place to explore and test different aspects of our work and services that could inform the core work of the Dream and Discover team. The four big bets included: (1) using immersive inspiration visits to provide an in-person experience for incubator founders; (2) exploring what the intentional development of equity mindsets during our design process might look like; (3) exploring our informal stance on the “right” leadership competencies and what conditions are ripe for innovation (i.e., what does innovation look like in a turnaround setting?); and (4) getting more precise about what innovation that touches the instructional core and what students are doing in their classrooms might look like. Each of these big bets was identified as a gap area or tension, which I excavated from chats over coffee with staff members, identified as pain points while learning and leading the school design journey content, and gained from my own experience as a school founder. Articulating this vision seemed to further invest Dr. Erikson in the possibilities of the incubator, and it allowed me to advocate for a restructuring of my priorities in order to make time for this exploratory venture. Our conversation was also an opportunity to explore how we might resolve some of the tension the Dream and Discover

team was facing between our contradictory structures of partner-facing projects and the internal need to smooth and refine our approach through innovation. While I felt successful in getting Dr. Erickson invested in the incubator vision, I failed to extend that success to other important leaders in the organization, specifically the functional leads and co-founders. Additionally, the big bets in and of themselves were large areas of opportunity and learning, and I overestimated what progress I could make in each of these areas. In my estimation, I was able to make significant progress on immersive inspiration visits and moderate progress on the intentional development of equity mindsets. Work and momentum on the other two big bets were stalled or deprioritized; the recommendations for how to move forward will be discussed in the “implications for site” section.

A second decision that allowed me to practice ambidextrous leadership was learning how to behave and lead in a consistently flexible fashion, honoring principal four. O'Reilly and Tushman (2016) urge leaders to have deliberately different expectations for the explore and exploit units, and to allow for looser and more experimental conditions for the explore work. For months I attempted to work on the incubator alone, and in late November I formed a design team with three other members to help make sense of the possibilities for the work. After only a few meetings, it was abundantly clear that engaging in the explorative work is so much more productive and generative when you can do it with a team. The convening of a design team helped solidify the recommendations for how Transcend can best support explorative, innovative work with limited capacity.

In leading the visit to DC, I purposefully pledged to give myself more freedom to lead authentically, to bring others into the work, to test what it felt like to give up control of strict outcomes, and to trust that the smart people in the room would arrive at the outcomes that felt most salient and purposeful for them, instead of forcing my neatly planned aims and

over-curated outcomes. The data points that support the net positive impact of leading a learning experience more freely and ambidextrously is the overall positive difference between the net promoter⁸ score from the first convening with the collaborative and the score from the DC visit (see Appendix P). While not a perfect comparison, it illustrates that educators can feel that a Transcend-driven experience is useful in the absence of existing relationships or of a commitment to a touchpoint like a year-long collaborative.

Unapologetically focused on equity. My residency journey was one of expansion and contraction, where I was open to receiving new inputs and information that helped me distill my point of view as an educator and a leader. My career and, arguably, my life's purpose has been to create more equitable and fair conditions for the most vulnerable children in our country. Even with this very clear understanding of my ethos, I entered the residency wanting to increase my skill in methods of innovation. I believed that this learning goal would morph into my primary focus and enable me to lay down, for even a moment, the ever present drive I feel to breathe equity into all aspects of my work and life. I was sorely mistaken to believe I could ever compartmentalize my purpose and reason for becoming an educator and a leader. To come full circle and know with unapologetic certainty what anchors me has allowed me to feel freedom in my work. This freedom was on full display during the culmination of my strategic project, to the place where I was first called Ms. Ward—Washington, DC.

The planning of the DC visit stretched my learning edge in operations, but it also sparked my creativity in program design. Having full autonomy and decision-making power for the visit permitted me to operate with less constraint and to think outside of the box in

⁸ The net promoter score is a question we place on every participant survey that measures the overall experience for the participant and how likely they are to recommend the experience to others.

curating an experience for a group of educators, leaders, and funders. I was resolved to provide an experience that was useful and thought-provoking, and that would give educators a firsthand model of how to think and design with equity at the center. This clear strategic aim grounded my decision-making as I set out to curate the visit with fastidious intentionality. Ahead of the visit I enlisted some of my most creative and talented colleagues to help brainstorm a list of possible sites to visit. This meeting yielded a dozen different places that would stretch the participants' hearts and minds, and it was my job to figure out how equity might be integrated into those visits.

On Thursday, February 7, 2019, the participants toured the Blue Plains Wastewater Treatment Plant, the only plant of its kind in North America because of its investment in innovation and technology. We started the day there, the purpose being to take our participants to a civic institution that operates in the background of a city or town but is something most people do not think about. It was also an unorthodox choice, and a place where people would make different meaning of the information they learned and how it might relate to their home towns and to the design of their children's learning experiences. We then enjoyed at lunch at the historic Ben's Chili Bowl on U Street, after which we made our way to IN3, a black-owned incubation and innovation space with a social impact mission, which was located right on the Howard University campus. While at IN3, we processed and synthesized the morning visit and engaged in an equity activity inspired by the powerful artwork of Titus Kaphar. In 2017, Kaphar gave a TED Talk that sent a compelling message about the use of art as a means to amend history. Using his provocation, I created a session that stirred discussion about the stories that are told in history. I then asked the participants to do a research sprint on a historical work of art, then to contrast that with Kaphar's "amended" visualization of that historic work of art. We closed the activity asking

participant's to discuss how they might play a role in amending history by bringing into the open the concealed stories of their schools' and communities' pasts. Friday brought us to Van Ness Elementary, where we met with the principal, Cynthia Robinson-Rivers, and observed classrooms that have been intentionally designed with the learning science that speaks to how people and children best learn and are motivated.

Stepping away from the event to reflect on the successes and places for improvement brings me much pride, because I feel I had a breakthrough as a leader when I fully lived into what matters most to me. This event was the culmination of a slow and steady process I have undergone, a self-evolution to unapologetically turn my volume up to 100% and bring to my work absolute authenticity, honesty, and a ferocious quest for equity. Taking the risk to lean fully into the ideal vision of my leadership paid huge dividends, and the feeling in my heart when the visit concluded was one of great freedom. A funder who took part in the visit pulled me aside and shared with me "that most people give lip service to equity, but you live and breathe what it means to put equity front and center in what you do." Hearing these words, I immediately started to cry, because I felt . . . seen, and in the most sincere and truthful way.

Quantitatively, the visit was also a success; in fact, it has been confirmed that we will add inspiration and learning visits as a new business offering for our team next year, and will continue with a service to continue supporting new school founders in something similar to the incubator. In the "implications for site" section, I will speak to the next steps Transcend should take to gauge the long-term impact of the visit, highlight which aspects of the visit to keep and strengthen, and the potential business model to monetize.

Learning to Fail Forward

Acceleration driven by external demands. Establishing the school design incubator as my strategic project was a decision made early on in my residency, although the execution of the project and clarity about my approach were slow to materialize because of competing demands of time. I initially thought I had more time to follow the disciplined entrepreneurship framework for new start-ups by studying the current incubator landscape and speaking to recent school founders and other target customers, and then to form my strategy, which would be vetted and iterated with a larger design team. I had to pivot from this initial plan within a few weeks because of real and perceived pressure to have a well-formed document and vision of what the incubator would offer to potential school founders who were already in our pipeline, many of whom Transcend had already been in conversation with before I came on board.

The pressure to have a document to share externally drove the incubator visioning process. I can best assess this pivotal moment in my residency by using the CVF to analyze the organizational culture through a market lens where the necessity to compete drives the core culture of the business. The external demands of three viable design teams that were ready to engage and excited to get to work on their school visioning partnership with Transcend contributed to the expectation that we would act quickly and be competitive and opportunistic in the short term. The market culture emphasizes customers and goal achievement, thus creating a vision for the incubator that was compelled by the customers we had waiting for us to engage them.

Moving quickly without completing primary market research did not result in any apparent negative effect for the incubator participants, but it did create internal dissonance and thus was a misstep in my leadership and a moment necessary to scrutinize. As the vision

for the incubator was being created, I did not feel I was in a position to oppose the speed of the process so, despite feeling strongly that more time was needed to form a strategy, I fell in line with normal operating procedures. Having some distance and additional training in diversity, equity, and inclusion, I can now acknowledge my discomfort in the moment as being what Jones and Okun (2001) call a “sense of urgency”: “[a] continued sense of urgency makes it difficult to take time to be inclusive, to encourage democratic and/or thoughtful decision-making, to think long-term, to consider consequences” (Okun & Jones, 2001, para. 3). On further reflection, I also see that the idea that I lacked the power to influence the process was not fully accurate. It took me some time to recognize my new role as a leader in the organization and what the best way was to share my feelings. I underutilized my manager’s support in influencing the process and navigating the discomfort I was feeling. If I could do it over again, I would not be complicit in moving at the desired pace and would instead gauge where there was flexibility, identify the dissonance I was feeling, and problem-solve as to how to pull in the resources necessary to fill the gaps in the primary market research and get greater clarity about what problem the incubator sought to solve for the founders.

Informal and formal organizational culture. Schein defines organizational culture as a “set of shared, taken-for-granted implicit assumptions that a group holds and that determines how it perceives, thinks about and reacts to its various environments” (Schein, 1996, p. 236; see also Hartnell, Ou, & Kinicki, 2011, p. 677). As a start-up in its third year, it is natural that Transcend’s organizational culture is continually developing and that the stages of teaming are in flux. In fact, in *Diagnosing and Changing Organizational Culture*, Cameron and Quinn (2006) describe the predictable evolution new or small organizations go through using the CVF. Figure 6 highlights the life cycle of a new organization.

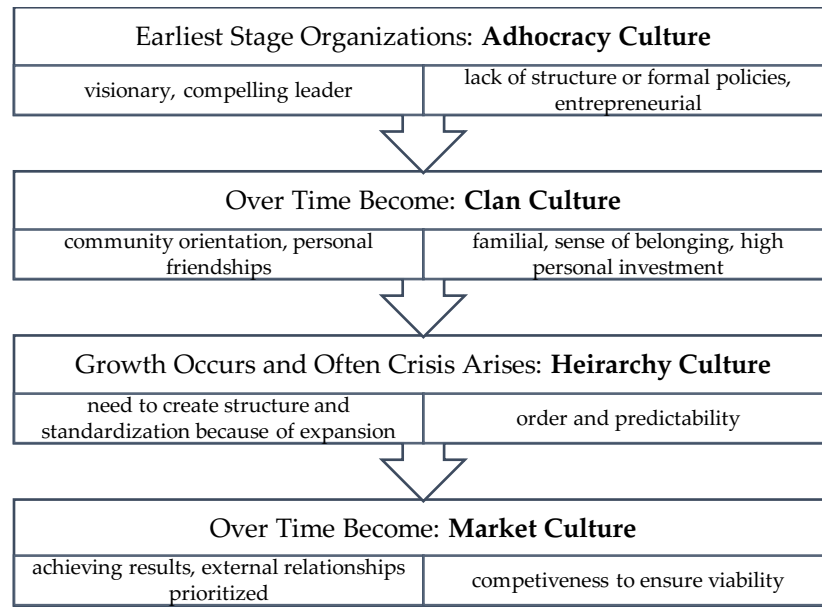


Figure 6. Evolution of organizational culture shifts for a new business (Cameron & Quinn, 2006)

Using this evolutionary frame, it is possible to map different functional teams, how we live into our core values, and where our mission and theory of action are best suited, in completely different quadrants of the CVF framework. The expansiveness of the culture creates a misalignment between the organization's espoused values and mission and the lived culture and expectations. For me, as a newcomer to the organization, the unintended consequences of different aspects of the organization living into differing organizational cultures created an environment of constant negotiation and sometimes confusion (see Appendix Q for CVF framework and evidence of Transcend's organizational culture).

I found that, as a contributor to the overall culture of my team and the organization, I opted for silence rather than inquiry when points of confusion came up with the whole staff. Though, I felt more camaraderie and kinship with my immediate team and was able to be more open with the smaller Dream and Discover team. I also had the opportunity to hear about others' pain points and successes and listen to what others in the organization were

feeling, but I was unsure how to share this information and with whom it would be most pertinent to share it. The amorphous organizational structure, the pace of learning and execution, and my own hesitation to assert a strong point of view with the full staff were all contributing factors to me withholding information and opting to listen and inquire rather than take action. In the “implications for site” section, I recommend that Transcend determine the organizational culture that would best fit their current operating alignment and commit to creating structures that define more clearly what should be valued most in the organizational culture and how the work will get done.

Learning ambidextrous leadership. In our first return to campus visit, I related to Dr. Erickson that the incubator work had been halted because I was prioritizing learning and leading our team’s two largest outward-facing projects. I did not feel I had enough capacity or time to do all of these things well, and I shared openly that the incubator continued to take a back seat because of the high-stakes nature of the partner projects. This return to campus visit gave me opportunity to clarify how to shift my approach to designing the incubator by leveraging my knowledge of ambidexterity. As I continued to learn more about exploiting and exploring and the different orientations needed to do both well, it helped to clarify that the pain I was feeling was parallel to the pain and difficulties my whole team was facing in their work.

O’Reilly and Tushman state that executing contradictory work is difficult because simply remaining competitive in the core business “often fully occupies management’s resources and attention,” making experimentation feel like a distraction (2016, p. 53). The reality of this complication usually results in people and businesses overinvesting in core business exploitation and underinvesting in new market exploration. This directly explains

my own orientation toward working on and learning the content of the core business, or the projects most aligned with what my team's work had been in the previous two years.

There was also further reinforcement to focus on other exploitation work because exploration work is rife with failure, roadblocks, and stagnation. It was disheartening to attempt to use my known skillsets to design the incubator over and over again when it resulted in slow progress or paralysis each time. After not hitting the outlined milestones, I stepped back to reflect on what was happening and realized that I was right in the heart of an adaptive challenge: I was learning to do something I had never done before using mental muscles I had not developed in my previous career experience.

Taking some distance to examine myself and my actions helped me strategize a different path forward, one where I could bring together a group of invested teammates to become a small incubator design team. Convening this group twice before February yielded feelings of camaraderie and new energy for the incubator work. In the first kick-off meeting, we developed team norms and agreements for our work and committed to being creative and collaborative and to encourage wild and crazy ideas, all while leaving a lot of space to be free and fluid. In the second design team meeting, we took one of the incubator big bets on innovating the instructional core and collaborated on a first draft of what an innovative academic block might look like (see Appendix R for Design Team Sprint Deck). The team collaboration was a value-add in and of itself, and it fostered feelings of connection while also helping us make progress on answering a big question the organization and education sector were facing.

Learning to align myself differently when working on the incubator versus working with the partner-facing project was a tremendous lesson in leadership (Figure 7 visually displays how the alignments differ between explore and exploit). Understanding that using

the same skills in both places was not going to cut it forced me to do things differently.

Taking more collaborative action earlier on undoubtedly would have enabled me to create a more robust program for the incubator teams, and to likely reach and exceed the goals of the strategic project. The early evidence of progress and the camaraderie I felt while working with the design team confirmed that I needed to bring people alongside me earlier and more often. The lesson here for myself and for the organization was that adaptive and explorative projects had to be given adequate space, time, and human capital to make significant progress toward a new innovation or creative idea.

Alignment of:	Exploitative Business	Exploratory Business
Strategic intent	cost, profit	innovation, growth
Critical tasks	operations, efficiency, incremental innovation	adaptability, new products, breakthrough innovation
Competencies	operational	entrepreneurial
Structure	formal, mechanistic	adaptive, loose
Controls, rewards	margins, productivity	milestones, growth
Culture	efficiency, low risk, quality, customers	risk taking, speed, flexibility, experimentation
Leadership role	authoritative, top down	visionary, involved

Ambidextrous Leadership
Different alignments held together through senior-team integration, common vision and values, and common senior-team rewards.

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Figure 7. Alignments for exploring or exploiting business. Source: <https://hbr.org/2004/04/the-ambidextrous-organization>

In analyzing my leadership within the residency and the constraints of the organization, I revised my theory of action to represent the collective lessons learned.

Revised Theory of Action

Original Theory of Action	Revised Theory of Action
If I...	If I...
<ol style="list-style-type: none"> 1. Clearly define the problem the strategic project is seeking to solve. 2. Capture data about what incubator founders find useful and inhibitive about Transcend's assets through coaching support. 3. Provide learning and inspiration experiences designed to fuel participants' conviction to redesign their learning communities with an emphasis on equity and intentional consideration of history and community contexts. 	<ol style="list-style-type: none"> 1. Collaborate with senior leadership on the timeline, expectations, and vision for the strategic project and align on cascading communication and decision points within the residency 2. Evaluate the alignments necessary to juggle between "explore" and "exploit" projects and clarify the available resources, budget, and human capital that can be dedicated to the strategic project 3. Create a realistic and collaborative vision for the internal coaching skills and methods necessary to promote two key outcomes: (1) equity-centered conviction and critical awareness, and (2) innovations that touch the instructional core
Then...	Then...
<ol style="list-style-type: none"> 4. Educators will be increasingly convinced of their rationale for why they want to redesign their school with evidence around equity-centered beliefs. 5. Educators will have experienced replicable activities and gained transferrable knowledge they can use in partnership with their own communities. 6. Transcend will have a baseline understanding of the inputs that help foster equity-centered innovative school design, which will enable us to more accurately quantify the impact of our assets and coaching. 	<ol style="list-style-type: none"> 4. Founders will have the ability to clearly and compellingly articulate their equity stance and reason to redesign school 5. Coaching supports and in-person experiences will have provided educators with replicable activities to use in designing with their communities 6. Transcend will have a baseline understanding of the coaching supports and inputs that help foster equity-centered innovative school design that impacts the instructional core

Implications for Self

I entered my residency with three goals: (1) to contribute to team goals early and often by using my knowledge and listening skills to unearth the adaptive challenges of how inequity may play out in the school design process and execution of innovations; (2) to build relationships within and across the team while keeping my love and devotion to our children and rigorous academic expectations front and center; and (3) to learn how to negotiate visible boundaries so I would be able to make a commitment to my own self-care, health, and wellness.

Each of these goals caused me to lead through adaptive challenges, and I understood that adaptive leadership, or “the practice of mobilizing people to tackle tough challenges and thrive” (Heifetz, Grashow, & Linksy, 2009, p. 14), would be an unavoidable necessity during my residency. The author’s note the following about the concept of thriving through change: (1) adaptive leadership is specifically about change that enables the capacity to thrive; (2) successful adaptive changes build on the past rather than jettison it; (3) organizational adaptation occurs through experimentation; and (4) adaptation relies on diversity (p. 14).

The most complex adaptive challenge I faced throughout my residency was learning to manage myself while leading two projects that required conflicting thinking, working, and execution modes. Getting some emotional distance from the work in order to reflect and be objective while still doing the work was an exercise of discipline, deep listening, learning, and trying things out firsthand. With the growth of our team, the diversity of perspectives and experiences rapidly increased across all dimensions. With a very short runway to begin with, our work immediately required us to shift and provided a prime space for experimentation. I was operating from a mindset of invention, where I hoped to create something “from scratch” rather than building on the tremendous bodies of work that already exist in the

incubation space. Not knowing when to pull in my existing skillsets or how to create something from the ground up led to many moments of paralysis and prevented me moving the work forward productively. I defaulted to “working harder” and putting in longer hours, rather than bringing others alongside me and asking for help earlier. **Leadership Lesson #1: When navigating adaptive challenges, assess which of your skills you can lean on, and collaborate earlier and more often than you think you need to. When innovating, rather than allowing all things to be up for experimentation, look to what has come before and be clear about what will remain consistent as you build.**

Coming on to the team with a hypersensitive lens on equity brought forth the adaptive challenge that team members were experiencing feelings of loss and sometimes defensiveness; although this was rare, it was important to acknowledge as I moved forward in my leadership. I feel particularly attuned to being able to pinpoint the “value-in-practice” or “the gap between the espoused value and the current reality” of what we say versus what we do (Heifetz et al., 2009, p. 18). Given this tendency, I failed to remember one of the key lessons of adaptive leadership; that calling out or addressing a dysfunction in the organization will put me in an unpopular position. I needed to remember constantly that saying the unpopular thing can create dissonance and that “closing the gap would be more painful to the dominant coalition than living with it” (p. 18).

My hope in calling out the gap was always to illuminate opportunities for growth, and to help my colleagues and the organization feel empowered to think critically and be more aware of how we inadvertently perpetuate systems of oppression. Critical consciousness requires dialogue and a space where courageous conversations can be held. We cannot counter systemic and systematic injustice and inequity in education if we cannot collectively and individually examine our actions and beliefs and do so honestly. We are all

byproducts of an elegantly planned system that perpetuates itself through inaction and a lack of reflection and conversation. In order for real equitable change to occur, very difficult and often personal conversations that lead to critical thinking and action must also occur. My goal is to continue to hone my ability to create these courageous spaces so we can collectively mitigate feelings of loss or confusion. **Leadership Lesson #2: Understanding my sensitivity to detecting organizational dysfunction or differing “values-in-practice” as they relate to equity, I must play a role in creating a culture that allows honesty and vulnerability in processing feelings of loss. This will lead to action instead of stagnation or defensiveness. I can and must do this in community with others, as it is our collective responsibility to call forth change.**

One challenge I have faced in taking on leadership work is that it can sometimes feel distant and removed from the classroom and the children. Keeping children front and center, especially those most underserved by our school systems, has been a constant goal throughout my residency and the Ed.L.D. program. The longer I am away from children I can name and unable to see the impact of our work, the easier it seems for the conversations on innovation and education to enter an amorphous and vague level. In order for equity to beat ferociously throughout my work and work for the future of school, I must remain in touch with and grounded in relationship with children and young people. **Leadership Lesson #3: Regardless of my position in the education sector, I must remain in community with children and young people so that I am grounded in their hopes, dreams, aspirations, and realities.**

I have been on a journey toward liberation, self-compassion, and healing since before entering the program, and I had high hopes and dreams for how I would transform myself in this final year. Stepping back, I recognize that I have taken more leaps of faith in

the last two and a half years than I have in my entire life up till then; I have tested and interrogated all boundaries I faced, and I have trusted and asked for support from so many caring and wonderful people whom I now consider family. Being held in a space where I am embraced—and not “tolerated”—has been the foundation I needed to look inside myself and heal the things that inevitably would hold me back in my future life and leadership.

Leadership Lesson #4: Find work that feeds your soul and surround yourself with people who acknowledge and welcome your full, authentic self. Investing in and caring for yourself will open the floodgates so you can be your best, most giving, and unrestrained self in your work.

Implications for Site

Develop a more precise vision, strategy, and definition of innovation. As a start-up, Transcend is in a natural state of growth that has required taking an opportunistic stance. Understanding the natural evolution of a business (see Figure 8), Transcend cannot rest on its initial success and systems for how to conduct business and it must craft a forward-facing, long-term strategy for what lies ahead. The organization is aware of this imperative and has started taking steps to leverage business-sector expertise to help with its future vision and strategy work.

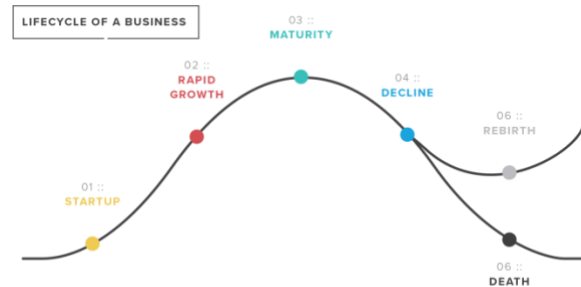


Figure 8. Lifecycle of a business, Source: <https://think-brew.com/where-are-you-in-your-business-lifecycle/>

As an internal team member, it is important that I share my experience of the current vision and strategy in the hope that it will help senior leaders develop a more precise and disciplined approach to communicating what is most important right now at Transcend and where it is going. To that end, I return to my RKA and pull from the innovation strategy literature: “A good strategy provides *consistency, coherence, and alignment*” (Pisano, 2012). To achieve consistency, coherence, and alignment, an innovation strategy should be able to answer three key questions: (1) How does the innovation create value for customers? (2) How does the company plan to capture a share of the value produced by the innovation? (3) What types of innovations allow the creation and capture of value, and what resources should each type of innovation receive? (Pisano, 2015).

With these three guiding questions in mind, Transcend must first work to internally align on how innovation is defined and what it looks like in different contexts. For example, what does innovation look like in turnaround schools? Are we interchanging invention

(creating something novel and new) and innovation (new combinations of existing elements)? Transcend could go several layers deeper to be more precise and disciplined in defining who our customer is and what value we create for them. The current strategy has an opportunity to be clearer about what is most important to drive toward and what outcomes we hope to see from those actions.

To the third question of capturing value and allocating resources, Transcend could sharpen its innovation strategy and the structures needed to foster an adhocracy culture that upholds ambidexterity. Transcend must remember that “the skills required to generate innovation differ significantly from the skills required to capture their returns” (Salter & Alexy, 2014, p. 12).

Transcend should identify one to four innovations supported by its R&D efforts that would benefit from experimentation and from dedicating time to come up with a minimum viable product to test. Following routines outlined in the RKA, innovation will be best supported when Transcend (1) creates a decision-making protocol to select projects; this will ensure that there is not over-reliance on instinct and that the selection process is replicable; (2) convenes a group that operates as separate unit that is not tied to partner-facing projects, where innovation can occur while leveraging core business assets; and (3) gives the unit leaders permission to create a culture that offers autonomy and forgiveness while tolerating failure.

The innovations we seek for the sector will not bear fruit at an optimal pace if all staff members are expected to work with partner-facing projects in the exploiting arm of the business while balancing exploration work that requires a contradictory orientation, skillset, expectations, and arrangement. I recommend innovation deep dives of one to four weeks as a structure that could allow team members the freedom and autonomy to play big. During

these deep dives, staff members should be cleared of other responsibilities related to partner-facing work so they have time to get significant traction on exploration work. I suggest that the innovation teams reside in local areas where a group of team members can get together in person to work side-by-side for a short amount of time.

Answering these questions on strategy will help get Transcend to a clear and compelling vision for the organization, yet the strategy is not enough to ensure the innovations created will result in tangibly improved outcomes for all children. Within Transcend's strategy, it must also be clear how the organization and its innovations expect to navigate building skill and beliefs, internally and with its partners, to increase critical consciousness so that the new innovations and new school designs are not replicating systems of power and white dominance that perpetuate the status quo in our schools.

Investigate the organizational orientation of execution in service of an innovation culture. As a successful organization that has many incredible people knocking on its doors looking for partnerships and work, its orientation to operate within the hierarchy culture on the CVF is reasonable, if the end goal is structure, control, and the advancement of the core business. In fact, much of our organization can and should be able to execute on exploitative work for our sustainability. It is also clear that exploitative work is not the only goal of Transcend; if the end goal is to create robust and status quo-shattering innovations, the organization must make different commitments. Hartnell, Ou, and Kinicki's study on organizational culture and effectiveness concludes that "it is important for executive leaders to consider the fit, or match, between strategic initiatives and organizational culture when determining how to embed a culture that produces competitive advantage. They should then espouse, enact, and reward the values and behaviors that are consistent with the desired culture" (2011, p. 11). In essence, they call for the culture and

strategy to be complementary and mutually reinforcing in the service of internal and external organizational success.

Team members have stated that the culture of feedback and execution deters them from playing big and taking risks. This is a notable gap of values-in-practice and, left unaddressed, it can create a culture that does not support innovation and creative risk-taking. I recommend that Transcend clearly define the organizational culture that best fits their current operating alignment and goals. Transcend must clearly articulate the organizational culture it wants to uphold and work to live into that vision. This requires creating aligned structures that clearly define how work will get done, the supports that will be in place for team members, what is most important in the process and the outcomes, and how success will be defined.

As a final note on organizational culture, I encourage Transcend to think about how to narrow the divide between the insider-outsider dynamic that was highlighted in the organizational health survey and may be driven by a few core common affiliations. Beckman (2006), who conducted a study on “The Influence of Founding Team Company Affiliations on Firm Behavior,” makes the argument that a firm’s predisposition for explorative and exploitative behaviors is tied to a team’s affiliations. Beckman purports that teams with founding members from the same affiliation or company have a “narrower range of experience and knowledge,” which introduces limitations into the routines and competencies that permeate an organization (2006, p. 743). This makes the discovery of an innovation less likely because of the group’s limited diversity. A limited array of affiliations also creates routines and conversations that are often shared among the group. “Common knowledge effect” states that people will talk about the things they have in common. That shared knowledge positions teams to exploit as a business orientation because team members likely

find themselves in discussions that are straightforward, disagreements are rare, and how to arrive at an outcome is clear (Beckman, 2006, p. 744). It is critical that Transcend acknowledge that commonly held affiliations create a dynamic where common language and background knowledge likely dominate the organizational culture and ways of operating. Being mindful of previous affiliations will help illuminate the places the organization can become more inclusive and welcoming of other affiliations and modes of operating. It is noteworthy that research shows that increased diversity in affiliations is also associated with a greater ability to explore, or innovate on the work.

Define and test instructional innovation. Innovating at the school model level puts every aspect of school on the table as a potential thing to change. It creates ambitious and beautiful tension and requires a good deal of guidance so educators can navigate effectively. In my work coaching teams this year, it became clear that the organization's stance and its resources to help think through instructional innovation is still in a nascent stage. A key question has repeatedly surfaced: How do we push harder on innovations at the center of instruction?

The desire for greater clarity on instructional innovation leads me to recommend that Transcend address the gap in the visioning and building phases, where we are asking educators to redesign and reimagine their schools. There must be a way for design teams to spend significant amounts of time with research-based methods that can bring educators closer to answering key questions about the best way to support teachers in their instruction. It is not yet clear how education leaders can think innovatively and make decisions about the intellectual preparation process necessary for teachers to become content masters, the content to put in front of children that will be interesting and engaging, the right balance of autonomy and guidance, or even whether instruction can be made different or better by

rethinking the role of the teacher. This list is not exhaustive, but it is a start to thinking up a new method that could spur educators to latch on to some guidance as they rethink what instruction looks like in an innovative model. Answering these questions requires looking at what has been successful in the past while looking forward to bring children, teachers, and leaders into the conversation about what the future of instruction can be.

Inspiration and learning visits and the impact of the strategic project.

Inspiration visits that take educators out into the world to be inspired by education and non-education sector organizations have been a standout component of the school visioning curriculum for the Dream and Discover team since 2016. These visits have been the highest rated part of the Collaborative experience year after year. Due to demand from our current partners and frequent inquiries from schools and organizations, the Dream and Discover team has begun to think about running inspiration and learning visits as a core business in fiscal year 2020 and beyond. The success of the inspiration and learning visit to Washington, DC, played an important role in solidifying the hypothesis that we could run standalone two-day visits completely untethered from the partners in our current portfolio. This time bound touch point with educators and leaders presents an opportunity to increase the reach of key program components without a long-term commitment or engagement. A draft proposal has been created that outlines the rationale for extending resources to build out this service, how it currently connects to Dream and Discover and Transcend strategy, and the estimated cost per event (see Appendix S for proposal). I recommend that the Dream and Discover team use the next year to plan no more than three visits that will test different hypotheses about the best positioning for this service in the field. The pilot for next year should seek to answer the following questions:

- Who are the target customer groups?

- How do inspiration and learning visits create value for each customer group?
- What price point are participants willing to pay?
- How will you measure the impact of these visits in the short, mid, and long term?
- What resources and human capital are necessary for planning, operations, and execution?
- Which program elements will remain consistent? Which program elements will be up for experimentation and innovation?
- What does success look like?

Despite positive trending outcomes from the incubator pilot and the inspiration and learning visit in Washington, DC, more time is needed to fully understand the impact of actions taken during my residency. To further substantiate the impact, I recommend (1) a survey follow-up with inspiration and learning visit participants six months after attendance, (2) conducting interviews to hear directly from participants what impact the inspiration and learning visit has had on them and their practice, and (3) following up with incubator founders a full year after they launched to see in practice and hear from their accounts what impact Transcend's assets and coaching support have had on their new school vision and launch.

With respect to the future of the incubator and Transcend's role in the sector with innovative new school design, I recommend that Transcend conduct more primary market research to better understand what is currently offered across the sector. This market analysis should include informational interviews and substantiate whether the current assets provide unique or differentiated value to new and former school founders. It is too early to tell if new school incubation is a viable service for Transcend to offer founders because of the cost and its capacity to lead the work within the organization and during residency. It is promising that the incubator work will continue in fiscal year 2020 and beyond. To ensure the program is viable, adds value to school founders, and can continue to be an enduring

business component that evolves with the needs of the field, it is recommended that

Transcend:

- Conduct primary market research to understand and solidify Transcend's unique value proposition in the incubation space
- Hire an established leader for the work that has experience in new school formation
- Provide a team of coaches to support incubator founders on a monthly basis
- Clarify the programming that will be unique to the founders to help them reach their outlined goals

Challenges of recommendations. Time and capacity are two of the scarcest resources for Transcend staff and, arguably, for educators across the sector. I have shared four recommendations that require internal capacity and dedicated time to realize. Additionally, identifying instruction at any level of the sector that yields robust and equitable outcomes for all children is like finding a needle in a haystack. Places that are soaring on standardized test scores more often than not are also lacking space for creativity, freedom, and the autonomy to solve real-world problems and ensure that children develop the social-emotional skills they need to thrive in life. Additionally, the success of innovation within school models can only be realized if we are not designing with the same mindsets and beliefs that created the disheartening outcomes our current school system gets for our children. Redesigning and innovating is meaningless if internalized, structural, and systemic racism is not made visible and adequately upended in the people working to re-imagine schools. The merits and outputs of innovation must disrupt the system to serve those it currently does not serve well. The intersection of clarifying strong instruction and tackling systems and mindsets of racism and white dominant culture is weighty, but it is a charge Transcend must run toward with the firm intent to learn and make positive progress on using their R&D capabilities.

Implications for the Sector

Define the purpose of school for our society. Children spend 13 years of their lives, 8 hours a day, 180 days each year in school. Yet, school by and large does not change the social position of our poorest and most marginalized children. This is not by accident; it is by design. The first American school, Boston Latin School, was founded on April 23, 1635. Reverend John Cotton heavily influenced the establishment of the school because of his desire to create an institution in Colonial America that was similar to the Free Grammar School in Boston, England. In 1647, The General Court of the Massachusetts Bay Colony ordered by decree that elementary schools be formed in any town with 50 families and a Latin school established for any town with 100 families. “The goal is to ensure that Puritan children learn to read the Bible and receive basic information about their religion” (Race Forward, n.d.). Compulsory education in the New World was founded on religious ideals to further the agenda of the Puritans. Further research on the early history of education follows a similar pattern: select groups of powerful white men determine the purpose of school for poor children and black and brown children. Words like obedience, forbidden, industry, workforce, owners, slavery, immigrants, civilized, benefit, lose control, rich, racial segregation, desegregation, undocumented immigrants, and unequal scatter the timeline that captures the high-level historical events of education in this country. If we deeply understand the history of power and the fundamental design of education in our country, can we truly be surprised by the results schools produce today? What, then, is the purpose of school?

The education sector must go back to the beginning and understand the original purpose and subsequent iterations of schooling. This will take them to an institution that was established to advance the agenda of a powerful few. Changing history starts by understanding it, then thinking critically about all the ways institutionalized and systemic

inequity are built into the design of school and society. We must establish a new, universal purpose for education that disrupts the current system of social reproduction, or the “processes that ensure the self-perpetuation of a social structure over time” (Encyclopedia of Population, n.d.). Immunity and desensitization to the status quo of underachievement for the most underserved students can no longer persist in our schools and our communities. Transforming education requires America to confront its history and to amend the power structures that created the unconscionable yet predictable outcomes for children across our nation. Change will not come easily and confronting our history will be painful, but it is necessary and long overdue for our nation to redefine what it means for children and adults alike to be educated. Only then can we ensure that the time spent in school will put all children on equal footing to change their lives, their social positions, and the world.

Jeff Duncan-Andrade defines schooling as the “process by which you institutionalize people to accept their proper station in life,” while educating is the “process by which you teach people that they can fundamentally change their society” (Andrade, n.d.). It is not enough for a few people to win the education lottery and then to mask that luck as a meritocracy. The future of our nation depends on us co-creating a new and equitable purpose for education that acknowledges the grave injustices of our history. The new purpose and new design of school should guarantee that our children leave our care “educated” and not “schooled,” and with an equal chance to succeed in life.

Bridge research with practice to close belief and skill gaps in education. I have been struck by the abundance of research that lives on library shelves and online platforms but never makes its way to influencing on-the-ground practice in schools, or the inverse of on-the-ground practice influencing research at scale. The biggest questions and challenges educators face should be at the heart of university research, and the results of that research

should be made useful, digestible, and actionable for the field. I see a specific opportunity to bridge research with practice around a few key content areas: (1) critical consciousness, (2) child and adolescent development and psychology, and (3) the science that supports how children and people learn best and are most motivated.

How much students learn and achieve in school is directly related to the mindsets, beliefs, and expectations their teachers and other adults in the building have for them. Research on critical consciousness and high expectations is plentiful in the academic field, and there is an opportunity to use this knowledge to create supports that increase the level of belief adults have in the capabilities of children, irrespective of their race, learning abilities, or their circumstances. How might we use the theory of critical consciousness in practice? What significant moments that cause critical reflection do people, and specifically educators, need to wrestle with? What types of critical action lead adults to feel empowered to disrupt inequities in their practice and in their schools?

Research on children's and adolescents' developmental and psychological stages has served me well in my time as a teacher and a leader. It has helped me successfully connect with the children who are least connected in school and have historically felt the least successful. It has allowed me to create structures that repair harm and foster relationships between kids, adults, and families. The ability to be objective and to depersonalize the unfavorable behaviors children might exhibit is a skillset most educators do not have. Lacking this understanding often leads adults to problematize children in harmful ways that result in over-referral to special education services and disciplinary measures. I am intrigued by how programs like *Conscious Discipline* inform practice because it elegantly bridges research and practice to give adults and children the skills and language they need to increase their ability to regulate their emotions and manage others in challenging situations. How might

understanding what is happening in children's and adolescent's bodies and minds change how we handle "difficult" behaviors? How might policies change if decision-makers were knowledgeable about the impact of trauma, poverty, learning English as a second language, or living with constant stress and fear as the child of an undocumented parent?

Transcend's "Designing for Learning" primer is one example of research that is useable and accessible for practitioners. The authors synthesized research and best practices from the literature on cognition, motivation, identity, and individual variability and distilled it down into 16 principles that clarify how people best learn and are most motivated. What other areas of science and psychology might benefit from a similar distillation of literature to help inform educator practice?

Addressing persistent inequities in academic achievement and life opportunities for underserved children requires ambidextrous, adaptive leadership.

Confronting adaptive challenges in education requires people to change. We have not been able to fix gaps in achievement for poor and black and brown children simply by implementing a specific curriculum with fidelity, or by innovating at the margins of school structures, or even by paying teachers more. These technical fixes alone cannot shift the pendulum of historical and institutionalized racism and inequity in our school systems. Adaptive challenge asks people to change their "values, beliefs, habits, ways of working or ways of life" (Heifetz & Linsky, 2004, p. 35) because fixing educational inequities requires deep change from everyone. In "When Leadership Spells Danger," Heifetz and Linsky (2004) outline five tactics for success when leading adaptively: (1) don't do it alone, and find partners in the work; (2) keep the opposition close, because they are the people you must understand the best because they have the most to lose; (3) acknowledge their loss; it's not enough to state the value of the future change because what people must give up has true

personal value to them; (4) accept that you will lose people or need to ask people to leave in the change process, these “casualties” are unavoidable if people are unable or will not go with the change; and (5) accept responsibility for your piece of the mess because whether you are a new or senior player, you have had some part in the problem.

Using these adaptive leadership tactics and embracing change, no matter how difficult it might feel, is a critical step toward making real change and shifting the paradigm toward social and educational justice. There is no time to wait for someone else to take the lead, as we are all implicated in the problem and in creating the impetus for change. Leadership can feel dangerous because “you are rarely authorized to lead,” and those opposing change will “often to go extremes to silence the frustrating voices of reality” (Heifetz & Linksy, 2004, pp. 34-35). Educators and leaders will be ready to weather the storm if they are equipped with the adaptive leadership skills to give the work back to the people who have the most promise to bring about the right solutions and to shift the underachievement we face in education.

Once we have committed educators who are ready to lead change adaptively, we must figure out what does and does not work in each school context and learning community. Ambidexterity will allow schools, leaders, districts, harbormasters, and nonprofits to think about both incremental improvements to schools and radical innovations that can shatter the status quo.

Conclusion

Upending the historical and perpetual failure of the American education system requires disrupting the institutionalized power structures and deeply engrained mindsets that harm our entire society. Everyone in America suffers when we shy away from challenging our biases and privileges, when we remain complicit in our ignorance of authority and history, and when we choose silence over discomfort. American schools were never designed for black and brown and poor children to succeed. Schooling was designed around the idea of retaining power in the hands of a few and subjugating others to accept systemic failure as personal failure. “Fixing” education connotes the need for a simple repair, a futile idea in the face of the profound and collective societal failures we have allowed our children to experience. It is because of these hard truths that the purpose of education must be redefined and education re-created with equity as the center pillar.

Transcend’s mission—to inject and accelerate innovation in the core design of school—rests on the belief that schools must become more equitable and exceedingly better at preparing all children for college, life, and career. Transcend believes that its partners, if successful, will produce equitable and holistic results for kids, families, and educators while also inspiring other communities to adopt and adapt innovative designs that will create extraordinary learning environments in many more communities and impact many more children. With the demand for Transcend to engage more learning communities and leaders skyrocketing each year, it is necessary to create resources and experiences that more explicitly center equity in the work of innovation.

During my Ed.L.D. residency, I was given the opportunity to lead the creation of a school design incubator pilot that was designed to answer key learning questions for the Dream and Discover team:

1. What inputs and experiences promote conviction to deliberately redesign school for equity-centered outcomes?
2. What coaching supports aid school founders to independently leverage Transcend's assets to design their school vision?
3. What leadership skills and beliefs are required to successfully innovate?

The condensed literature from the RKA on problem identification, innovation and strategy, immunity to change, ambidexterity, and equity helped inform the development of my theory of action:

If I...	Then...
1. Clearly define the problem the incubator is seeking to solve 2. Capture baseline data about what founders find useful about Transcend's assets through coaching 3. Procure a learning and inspiration experience designed to fuel a conviction to redesign their learning communities, with an emphasis on equity and intentional consideration of history and community contexts	4. Educators will show increased clarity in their rationale for why they wish to redesign school with evidence of equity-centered beliefs 5. Educators will have experienced activities that they can replicate in designing with their communities versus for their communities 6. Transcend will have a baseline understanding of the coaching supports and inputs that help foster equity-centered innovative school design

I analyzed the outcomes of my ten months as a resident using Quinn and Rohrbaugh's (1983) Competing Values Framework and Tushman and O'Reilly's (2016) conception of ambidexterity. The task of leading an explore project and an exploit project simultaneously required me to practice ambidexterity. The CVF gave me the language and a frame for analyzing Transcend's organizational culture and the opportunities and challenges it is navigating as it grows.

I experienced both success and failure while creating the design for the School Design Incubator Pilot and leading phase one with school founders. The fast-paced nature of a start-up and the volume of information I had to consume left me cognitively saturated and in a state of paralysis at the start of my residency. I struggled to find my voice in creating the vision for the incubator and in leading adaptively when I detected the value-in-practice gaps between the aspiration and lived reality of the organization. Learning ambidextrous leadership helps explain the successes and failures of the strategic project, in particular the need to create different alignments and expectations for conflicting work. I underestimated my own capacity to get traction on the big bets within the incubator and failed to collaborate early and often. I walk away from my time as a resident also acknowledging that the pressure of leading work outside of my dominant skillset allowed me to grow and learn a tremendous amount in a short period of time. I found success in my residency once I committed to collaborate with my colleagues before an idea was fully formed or a presentation was completely polished, and was at my best when I consciously let go of excessive perfectionism in an effort to bring others into the work and invite discovery into my leadership. Learning to lead on my edge of growth, failing forward, and taking risks also helped me rediscover and double down on my commitment to focus unapologetically on equity.

Returning to the main questions for the strategic project, coaching supports, and key design experiences was integral in fostering a conviction to design and redesign school with equity at the center; however, more time is needed to fully assess the impact of the actions taken during the strategic project. To that end, my recommendations for Transcend highlight the need for greater clarity and more discipline around what matters most in the

organization so that team members can deliver on the mission. I leave Transcend with the following recommendations:

- Develop a more precise vision, strategy, and definition of innovation. Clarify how those innovations guard against replicating internalized, institutionalized, and systemic racism.
- Investigate the organizational orientation of execution in service of an innovation culture.
- Define and test instructional innovation.
- Conduct follow-up interviews with incubator founders and the Washington visit participants to substantiate the mid- and long-term impact of the project.
- When piloting inspiration and learning visits as a new service under the Dream and Discover team, be clear about what will remain consistent and test no more than two hypotheses.
- Continuing the incubator will require additional primary market research and a dedicated leader with school founding experience.

“Leadership often involves challenging people to live up to their words, to close the gap between their espoused values and their actual behavior . . . It often requires helping groups make difficult choices and give up something they value on behalf of something they care about more” (Heifetz & Linsky, 2004, p. 33). Education can only live up to its promise to provide opportunity and freedom to all of America’s children when the adults and system leaders are ready to align their actions and behavior with the values they say they are committed to. It is time for us to individually reckon with giving up some aspect of our

privilege and power for the greater good of our nation and our nation's children. Educating a child in an effort to unleash the excellence, passion, and unique gifts that exists within them is an act of resistance. I am firm in my conviction that school must be redesigned and redefined with an unwavering commitment to place equity at the center, because no child should go through 13 years of public schooling and come out inadequately prepared for their future. Leading change in education will require us to go for broke and be steadfast in the face of resistance:

To any citizen of this country who figures himself as responsible—and particularly those of you who deal with the minds and hearts of young people—must be prepared to “go for broke.” Or to put it another way, you must understand that in the attempt to correct so many generations of bad faith and cruelty, when it is operating not only in the classroom but in society, you will meet the most fantastic, the most brutal, and the most determined resistance. There is no point in pretending that this won't happen. (Baldwin, 1963, p. 1)

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Appendices

Appendix A

Transcend Organizational Map

how we're organized

(note: in true start-up mode, this continues to evolve!)

Co-Founders		Jeff + Aylon
FUNCTION School Partnerships	Transcend partners with with communities, systems, operators to build catalytic learning environments that prepare all children to thrive in and transform the 21st century. This work lives in our School Partnerships function .	<u>Dream & Discover Cluster</u> Britt, Kirsten, Crystal, Shari, Christina, Diego*, Rob* <u>Build & Test Cluster</u> Anna, Aylon, Stacey, Jane, Sarah, Katie, Ryan, Tyler*, Anirban*, Diego*
FUNCTION Knowledge	Transcend seeks, surfaces, synthesizes, and shares insights and evidence that inform our own projects and the broader field. This work lives in our Build Knowledge function .	<i>Lead</i> Charlot <i>Team</i> Cynthia, Jackie, Lillian, Sara Weaver
FUNCTION People & Community	Transcend develops and deploys a world-class and (by definition) diverse community of R&D talent -- staff, contractors, YHL -- who can inform and support the above and benefit the broader field. This work lives in our People & Community function .	<i>Lead</i> Lavada <i>Team</i> Oliver, Tyler
ENABLER Operations	Finance, legal, policies, systems, HR, technology, etc. work lives in our Operations team .	<i>Lead</i> Emily <i>Team</i> Sara Vaz
ENABLER Organizational Management	Strategic direction and clarity, resource allocation for our whole organization lives in our Org Management team.	<i>Lead</i> Jenee <i>Team</i> Sara Vaz
ENABLER Brand & Network	Our portfolio of external early engagement with school operators, social media, publishing and dissemination, Advisory Council, etc. lives with Tyler, and threads through all of our functions.	<i>Lead</i> Tyler
ENABLER Development	Our portfolio of fundraising, Board cultivation and management, etc. lives with Divya, and threads through all of our functions.	<i>Lead</i> Divya <i>Team</i> Catherine

**Some members of the Transcend team spend time on multiple functions or priorities*

Appendix B

The Transcend – NewSchools Venture Fund Collaborative Case Study

EXECUTIVE SUMMARY

With a shared vision for building innovative new school models worthy of students' potential and aspirations, our two organizations joined forces to launch the Transcend + NewSchools Collaborative. This ten-month, cohort-based program engaged educators from ten school districts and charter networks in exploring user-centered design, learning science, innovative learning environments, and best practices in R&D in an effort to accelerate change within existing school systems. The Collaborative had four core elements:

- ▶ **Three in-person convenings** provided the opportunity for shared learning, design work, and visits to innovative schools.
- ▶ **Customized coaching** facilitated the work of local design teams.
- ▶ **Self-paced resources and design tools** aided teams' work.
- ▶ **Funding from NewSchools** covered all program costs, provided travel funds, and offered grants of up to \$50,000 to support learning and innovation.

Some participants just wanted to learn more about innovative approaches in school design, while others were working on immediate redesign projects. We learned alongside them how to catalyze new ways of thinking and support the development of robust visions and plans for breakthrough models. Together we surfaced six key lessons:

1. Equity matters as a critical outcome of school redesign and is integral to the design process itself.
2. Productive dissonance catalyzes creative thinking and meaningful paradigm shifts.
3. Innovation spurs innovation—seeing innovation in action fuels creative thinking.
4. Customized coaching and support that meets educators and systems where they are fosters thoughtfulness and accountability.
5. Teams have to be innovation-ready and well-supported to make real traction.
6. When designing and leading a program like the Collaborative, it's difficult—but essential—to walk the walk by modeling the practices participants are exploring.

In this report, we share our vision behind the program; how we designed and evolved it; our key results; what we learned; and the stories of four participating teams (District of Columbia Public Schools, Gestalt Community Schools, Hiawatha Academies, and Spring Branch Independent School District.) We hope the work captured in this report will offer something of value to all those who are striving to ensure that our nation's schools play a meaningful role in preparing our students for whatever lies ahead.

Appendix C

Transcend School Design Incubator Pilot Overview



Transcend

Transcend School Design Incubator Pilot

You have joined a **community who believes in the unbridled potential of every student**. A group who believes that education can be transformative—for kids, for families, for our society, and who holds that unrelenting optimism alongside an assessment that our current approach to school is not yet realizing our aspirations. Embracing that tension, you've chosen action. You've chosen curiosity, learning, and a commitment to contributing to the next horizon of learning. We can't wait to help you realize your vision for a future school.

HOW WE GET THERE

-  Put school founders in the driver's seat by helping them set goals + craft their own design journey.
-  Share access to tools, resources, and methods to shape founders' design process, develop innovative design skills, and provoke new ideas about the design they ultimately create.
-  Offer coaching and thought-partnership along the journey.
-  Support founders to curate various virtual and in-person experiences to expand and inspire their school vision (e.g. visiting innovative schools, workshops or learning spaces; connecting with other founders; virtual consultancies, etc.)

Ultimately, the incubator serves to help founders advance five key aims:

- CONVICTION:** The steadfastness and courage to reimagine school.
- CLARITY:** A crisp and compelling vision and design for a new learning community.
- CULTURE:** Organizational norms and practices that support ongoing innovation, including trust, open communication and risk taking.
- CAPACITY:** The plan for assembling the people, time, skills and resources to bring a vision to life.
- COALITION:** Strong relationships and shared vision with students, families, educators and community members who will ultimately make up a new learning community and carry the vision forward.

How It Works

STEP 1

PREPARE yourself to lead and embark on the journey by setting goals, mapping your design journey, and building your team.

🕒 13 months



Coaching occurs approximately one per month

Founders use the lookit to set milestones and goals, then plot milestones for their work in pursuit of those goals and utilize lookit methods to build out visions aligned to their goals.

Outputs

- A Case for Change (your personal why for reimagining school)
- Clear goals for Step 2*
- A customized design journey + key milestones for the work ahead

*Note: Founders + their coaches meet to review goals and milestones and determine whether Step 2 is the right mutual next step.

STEP 2

With a robust team, you'll design a future learning community by deepening your understanding of all stakeholders' aspirations and lived experiences, exploring cutting-edge learning science and future trends, and prototyping big ideas. One key output of this work will be a **Canvas** for your future learning environment.

🕒 3-9 months



Coaching occurs approximately every other week

DISCOVER

Conduct empathy work with students and families
Explore future trends
Shadow a student
Seek inspiration in unlikely places

Outputs

Insights to inform your design

BUILD

Draft Graduate Aims
Build one or more student experiences

Outputs

Clear graduate aims and aligned signature experiences

Planning Outcomes

Recognizing that needs and aspirations vary, the Incubator is built to be flexible and adaptable when it comes to short and long term planning. We strive to support founders as they articulate long term goals, milestones, capacity needs, and operational needs required to make their vision come to life.



FAQ

Q: Who is a good candidate for the Incubator?

A: The incubator is for driven and curious leaders (e.g. educators, parents, teachers, community members, entrepreneurs, etc.) that are committed to reinventing school and have plans to found and open their own school. It is helpful, but not necessary, for founders to have additional support in aspects that this experience will not support: charter applications, board selection, development, and management, curriculum development, and funding.

Q: Will the incubator support me in all aspects of planning, operationalizing and launching my school?

A: No, the incubator is designed primarily to support founders in crafting a cohesive vision for their new school and to support them in planning to pilot and test elements of that design ahead of opening and is not designed to support every operational need that founders have. That said, we recognize every founder is on their own journey and will likely prioritize building several essential school planning documents (e.g. community engagement strategy, student, family or staff handbooks, a project plan to operationalize the vision, student enrollment plans, etc.) and we are happy to help make connections to people and resources for needs that this experience won't fully cover.

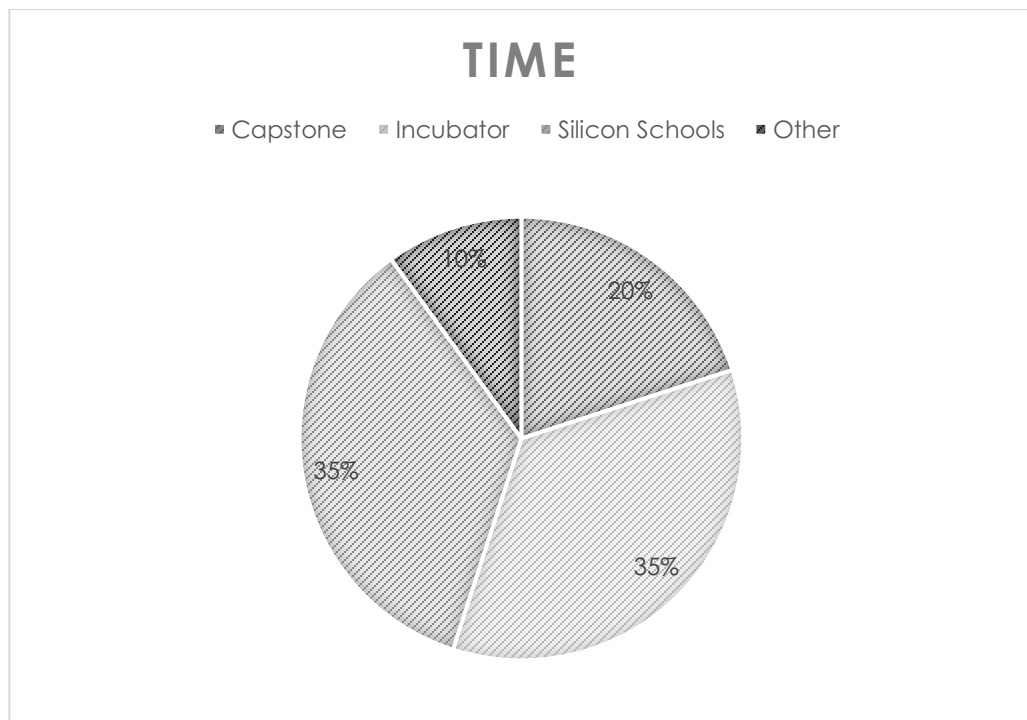
Q: What types of schools can someone launch?

A: Any type of schools that come out of this experience will be limited only by the imagination and the creative insights that are shared throughout the design journey. We are building the future of school—that means what we are aiming for what has not yet been built and does not yet exist!

Appendix D

Roles and Responsibilities and Time Allocation for Residency

Silicon Schools Fund	Excellent Schools New Mexico
Team Lead: manages relationship with SSF, leads work for convenings, coaches 3 design teams	Team Support: attends first convening, thought partner with team lead



Appendix E

Milestones and Project Plan for Incubator

INCUBATOR STATUS OVERVIEW

Date Updated:	12/19/18	
Workstream	Due Date	Status (On Track, Stuck, Some Risk, Off Track)
1. Learn, Design + Build Program		
Strategic Planning for Program - What Am I Building? Feedback? Where do I Collaborate?	10/26	on track
Toolkit: Method Completion	10/26	on track
Phase 1 Coaching Sequencing	TBD	deprioritized
Phase 1 Leadership Competencies	2/15	delayed
Big Bets: Inspiration	12/19	on track
Big Bets: Equity while Virtual	TBD	delayed
Big Bets: Instructional Core	TBD	delayed
Data Capture + Learning Plan	TBD	delayed
Team Captain R+R	1/15	on track
Design Team R+R	1/15	on track
2. Collaboration with Design Team + Team Captains		
Communication plan	--	deprioritized
Team Captain Recruitment for Catalyst	ongoing	on track
Team Captain Recruitment for Promesa	10/19	complete
Design Team Recruitment + Meetings	2/15	delayed
Team Captain Meetings	12/19	complete
3. Coaching		
Communication plan	1/7	delayed
Coaching Sequence Phase 1 vs. Phase 2	--	deprioritized
Promesa Academy - Ambika Dani	ongoing	on track
Catalyst - Amanda Gardner and Tatiana Epanchin	ongoing	on track
KIPP - Jeff Li and Joe Negron	ongoing	delayed
4. Inspiration		
Construct Inspiration Team	1/6	complete
Logistics + Planning	1/7	complete
Calendaring	12/1	complete
Cost	1/7	complete
Communication	1/7	complete
Outreach	12/19	complete
5. Business Planning		
Landscape Analysis	TBD	delayed
Founder Sourcing	TBD	delayed
Funding/Fundraising	TBD	delayed
In-Kind Payments	TBD	delayed
Future Program Design	TBD	delayed

Appendix F

Informational Interview Questions with Yellow Hats

1. What drew you to pick your particular program?
2. What was the greatest value you received for participating? What did you get out of it?
3. If you could do it again, what would you change?
4. What was missing?
5. What is your reaction to an incubator designed to launch innovative schools?
6. Do you see value in either a cohort based or 1:1 approach to support in an incubator setting?
7. If there was a price tag to a program that helped vision innovative school models, what would you guess the cost might be?

Appendix G

Incubator Team Milestones & Design Team Insights

PLAN YOUR JOURNEY WORK SPACE

I. Goals -- October-December 2018

Goal area <i>What do you hope to build, learn, nurture through this process?</i>	Indicators of success <i>What would be true if you achieved this goal?</i>	How you'll know <i>What evidence will you collect along the way to know you're on track?</i>
Dream Canvas. <i>I hope that we can build out a comprehensive dream canvas coupled with detailed operational support documents for the school model.</i>	<ul style="list-style-type: none"> • Dream Canvas-vetted by Transcend experts + other advisors • 3-5 year budget aligned with vision • Org structure/staffing model that is aligned • Relevant sections of charter application drafted 	<ul style="list-style-type: none"> • Hold a virtual roundtable to gain feedback on dream canvas, incorporate feedback from team of at least 5 trusted experts. • School budget and other documents thoroughly reviewed for viability by WA Charters staff
Community Engagement. <i>We need to find new ways to engage with families especially those who have been traditionally marginalized, in the Bremerton area.</i>	<ul style="list-style-type: none"> • Establishment of school design team, meeting monthly • Identify at least 10-20 parents + parent/community leaders committed to the creation of the school 	<ul style="list-style-type: none"> • Monthly design team meetings • 10-20 outreach events and/or 1:1s with parents each month • At least 5 parents who can be gatekeepers/bring other parents in

Design Insights from Community Design Team Meetings

- Scholars need to cultivate a sense of hope to thrive in the future but uncertainty and a polarized environment make that challenging.
- Scholars need to develop social intelligence but may not have the opportunity at home or in educational settings.
- Scholars need to be able to problem solve, want to cultivate change, will have to think beyond what we currently know, but also have foresight.
- Scholars need to problem solve or adapt, but hold onto their moral identity.
- Scholars need to be empowered to take control and value their community.
- Scholars need to develop cultural and global sensitivity, but need real life opportunity to engage.
- Scholars need to understand resilience versus a sense of entitlement; move away from instantaneous results. It takes hard work.
- Scholars need to make choices that keep them safe and engaged, and they have to use technology as a tool for everything, but over dependence on technology can be isolating, lonely, and lead to unhappiness.

Appendix H

Incubator Team Communication

Crystal,

I completely forgot to send you our DT materials in advance. Apologies--things are moving so fast these days.

I did want to let you know that we had a FANTASTIC meeting and leveraged many of the Transcend resources--see attached [agenda](#).

Here's a photo of the group--we had a blast and can't wait for the next one!

Talk to you next week!

email communication October 31st, 2018



Newsletter communication, November 6th, 2018
Appendix I
Coaching Meeting Next Steps w/ Toolkit Guidance

Below you will find an example of next steps from meetings where I provided guidance that helped the teams use the toolkit to design their meetings with some guidance and a draft of the journey I created to help create the picture of what could be accomplished in 10 months.

Guidance for Toolkit Shared in Next Steps

Category	Item
Toolkit	PREPARE → FACILITATE - review in advance of running a design experience with your monthly community team
Toolkit	<i>These can help with design team experiences to run during your meetings for co-creation:</i> DESIGN → DISCOVER - Craft Insights, Empathy Interview, Seek Inspiration, Explore The Future DESIGN → BUILD - Generate Aims, Select + Prioritize, Define The Purpose of School
Design Team Meeting	Meet to plan 10/29 meeting <ul style="list-style-type: none">• Review case for change• Review inspiration/Future Trends - is this what you want to do with the team?
Journey Guidance	Share yearlong scope and sequence of methods/toolkit use to give an idea of when to use toolkit methods.

Scope and Sequence for Toolkit Methods

	CYCLE 1: ORIENT, PREPARE + DISCOVER		CYCLE 2: BUILD	
Month	September	October	November	December
Key Design Team Activities	PREPARE <ul style="list-style-type: none"> - plan journey - mindsets - facilitate - reflect DISCOVER <ul style="list-style-type: none"> - shadow - empathy interviews 	Refine Canvas: <ul style="list-style-type: none"> - insights - case for change - portrait of a graduate and graduate aims 	DISCOVER <ul style="list-style-type: none"> - shadow - empathy 	BUILD <ul style="list-style-type: none"> - purpose of school - student experience generation

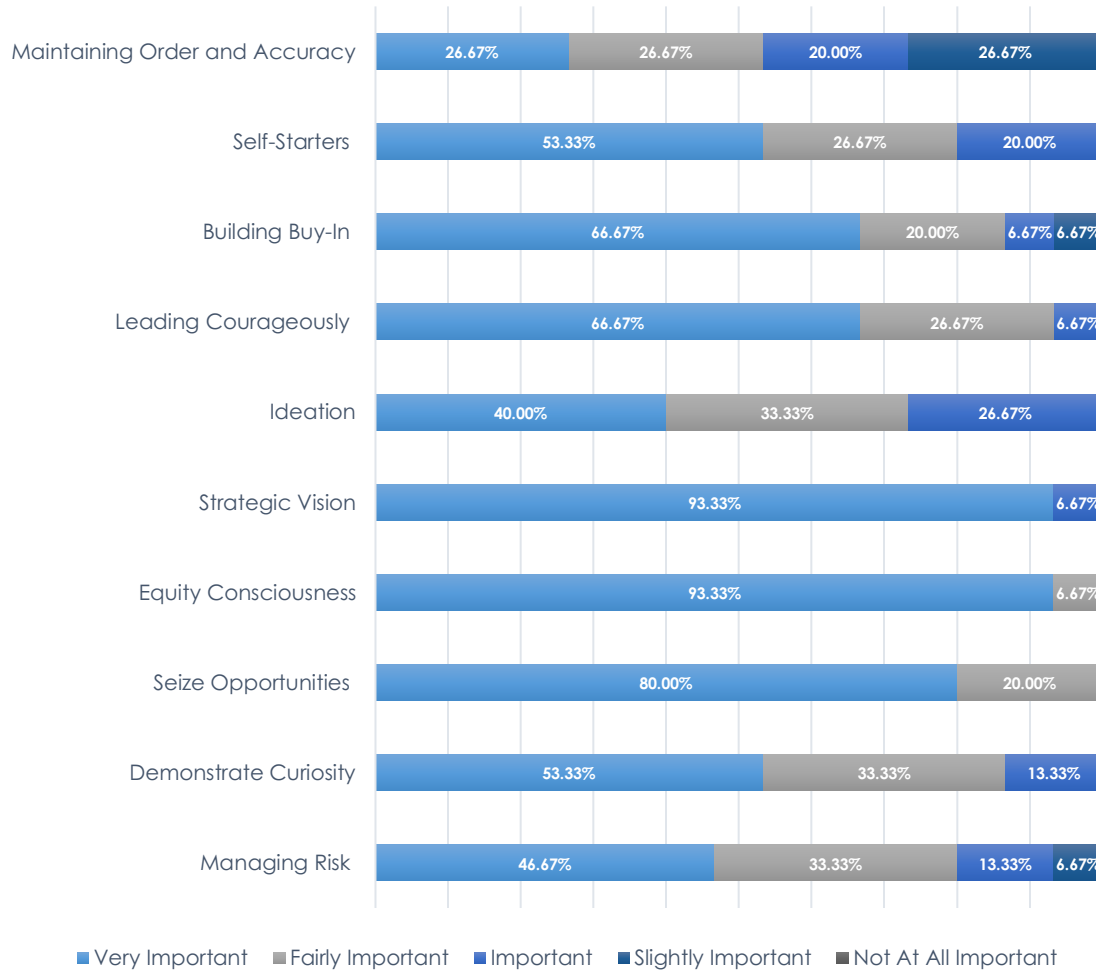
CYCLE 3: REFINE		CYCLE 4: TEST	
January	February	March	April
Refine Canvas: <ul style="list-style-type: none"> - learning science research - insights from data - graduate aims 	Design Sprint: <ul style="list-style-type: none"> - student experiences - LS audit - equity audit TEST <ul style="list-style-type: none"> - feedback - plan pilot - LS audit - craft design anchors 	Design Sprint: <ul style="list-style-type: none"> -Single experience to cohesive model 	BUILD <ul style="list-style-type: none"> - external canvas - innovation plan

Appendix J

Leadership Competency Survey Results

The graph below quantifies participant's ranking of each competency in terms of importance in leading innovation (as a note, no one ranked any of the competencies as "not at all important").

What leadership competencies are most important in leading innovation in schools?



Appendix K

Equity Planning for Inspiration + Learning Visit

Washington, DC Inspiration + Learning Visit Overview

GOAL: Immerse educators in an inspirational and learning experience that will increase their conviction to redesign school. A secondary goal is to experience Transcend's Dream + Discover team "inspiration" that is intended to open their minds to seeing in different ways, a critical step in building your skill sets as a designer of educational experiences.

	Learning Question + Theme	Outcomes
Day 1	History, Culture and Design	to design with a robust understanding of the culture and history of a place to ensure it is inclusive and not guilty of omission
Day 2	Science of Learning and Development at Van Ness	to leverage SOLD in their design for their graduate aims and signature experiences

Thursday, February 7th - History, Culture, + Design

Agenda + Details	Connection to Equity, Community, History
I, Too by Langston Hughes Opening	<p>We framed the start of the visit with a notable person of DC History - James Mercer Langston Hughes who moved to DC in 1924 to live with his mother and work under Carter G. Woodson as a researcher as well as a busboy at the Wardman Park Hotel. It was at this hotel that Nicholas Vachel Lindsay (a famous white poet) was set to do a reading. Hughes was not able to attend because of segregation, so he devised a plan and wrote out three of his own poems - Jazzonia, Negro Dancers and The Weary Blues on a paper and placed it beside Lindsay's dinner plate. As Hughes came to retrieve the dinner plates, he saw Lindsay reading his poems and newspapers the next day informed the world that Lindsay had "discovered" a busboy poet.</p> <p><i>Reflection Question(s)</i></p> <ul style="list-style-type: none"> What within this poem resonates? What is still relevant today in 2019?
DC Water Tour	<p>We seek inspiration in unorthodox places because a designer must disrupt their own thinking and lens to the world in order to design differently for the future of school. DC Water is a civic institution that is "hidden" and unknown to many yet plays a major role in how the city runs. DC Water was an opportunity to allow participants to be immersed in a learning experience that promoted discovery versus over scaffolding or over curating the experience before allowing them to make meaning of what they are seeing, learning, and feeling.</p> <p><i>Reflection Question</i></p> <ul style="list-style-type: none"> What surprises you?
Lunch at Ben's Chili Bowl	<p>Ben's is a historical landmark of Washington, DC's U-Street founded in 1958 by Ben Ali and Virginia Ali. At the time, U Street was America's "Black Broadway" and attracted some of the most famous names in Jazz including Duke Ellington and Miles Davis. Ben's Chili Bowl was one of the only places on U Street that survived the riots of 1968 that occurred in response to the assassination of Dr. Martin Luther King, Jr. We watched a video about the history of Ben's and all of the celebrities that have entered its doors while enjoying our lunch. We closed with taking a picture with Mrs. Virginia Ali.</p> <p><i>Reflection Question</i></p> <ul style="list-style-type: none"> What are you learning about the history, culture, and context of Washington, DC?
Travel to Debrief Space, Inclusive Innovation Incubator	<p>In3 is located directly on Howard University's campus and is the "District of Columbia's first community space focused on inclusion, innovation and incubation. The incubator is committed to creating a collaborative environment where under-resourced members have access to the space and services needed to build or grow a successful business."</p>

	<p>The impact In3 hopes to make in the district is to "improve the business landscape in the District by providing members with the right tools and access to financial, technical and professional resources."</p> <p><i>Reflection Question</i></p> <ul style="list-style-type: none"> • What are you learning about the history, culture, and context of Washington, DC?
Inspiration Debrief	<p>The morning brought us to the DC wastewater treatment plant, lunch at Ben's Chili Bowl, and to In3 and a short presentation on what this incubation space is hoping to do for the community and most marginalized people in DC. This was done to illustrate and make explicit how we live into the value of equity and inclusion; where we spend our money, the choices made about where to visit so that we can make visible the hidden history of DC, and the overall theme for the day illustrate an intentionality to design with a lens of equity and inclusion.</p> <p><i>Reflection Question</i></p> <ul style="list-style-type: none"> • What will you do with what you've seen and experienced in your home context?
Amending History: An Equity Session	<p>In this activity I leverage Titus Kaphar's works of art to ground in an equity activity that helps participants better understand the four types of stories told in history (stock, concealed, resistance, and counter stories). After getting an introduction to each, we then reflect on whose stories get to be told and whose history makes it into our own schema and memory and ask ourselves why that has happened. From there, participants research a traditional work of art that Kaphar's artwork is based on so that they can then contrast the "amendments" that Kaphar makes in his artwork to shift the narrative and bring to the fore the narratives that are often concealed in history.</p> <p><i>Reflection Question</i></p> <ul style="list-style-type: none"> • How will you amend history in your work and in your role?
Optional Happy Hour @ Nellie's	<p>Nellie's is located on the corner of 9th and U Streets and is the former Addison Scurlock Photography Studio. Scurlock was a famous portraitist that chose to chronicle the "lives of the DC African American elite and working folk during the glory days of the U Street corridor." This sports bar is a neighborhood staple and safe haven for DC's LGBTQ community.</p>

Friday, February 8th - SoLD + Design

Agenda + Details	Connection to Equity, Community, and History + the Science of Learning and Development
Van Ness Presentation with Principal Cynthia Robinson-Rivers	Principal Robinson-Rivers highlighted the history of the Van Ness Elementary including key points that illustrate the impacts of gentrification on her school community. She then shared the steps she has taken in the past and the steps she is focused on in the future in order to design her school with deep roots in the science of learning and development.
Observation of Strong Start Routine and Classrooms	30 participants traveled into classrooms at every level (Pre-K3-3rd grade) of Van Ness elementary with the lens of where they noticed the science of learning and development being honored.
Science of Learning and Development Debrief	In a debrief run by Dr. Brittany Erickson, participants have an opportunity to apply the science of learning and development to their own stories and then to take that understanding to unpack and debrief what they observed at Van Ness Elementary. Using our designing for learning cards (a set of cards that summarizes the learning science primer and makes the content accessible to educators and non-researchers) participants audited what they observed for the ways learning science was honored or not honored. In closing, participants think about how this can be applied to their home contexts.
Community Closing	In the community closing, we step back from the last 48 hours and end on notes of gratitude/appreciation.

Appendix L

Inspiration + Learning Visit Artifacts

Pre-work

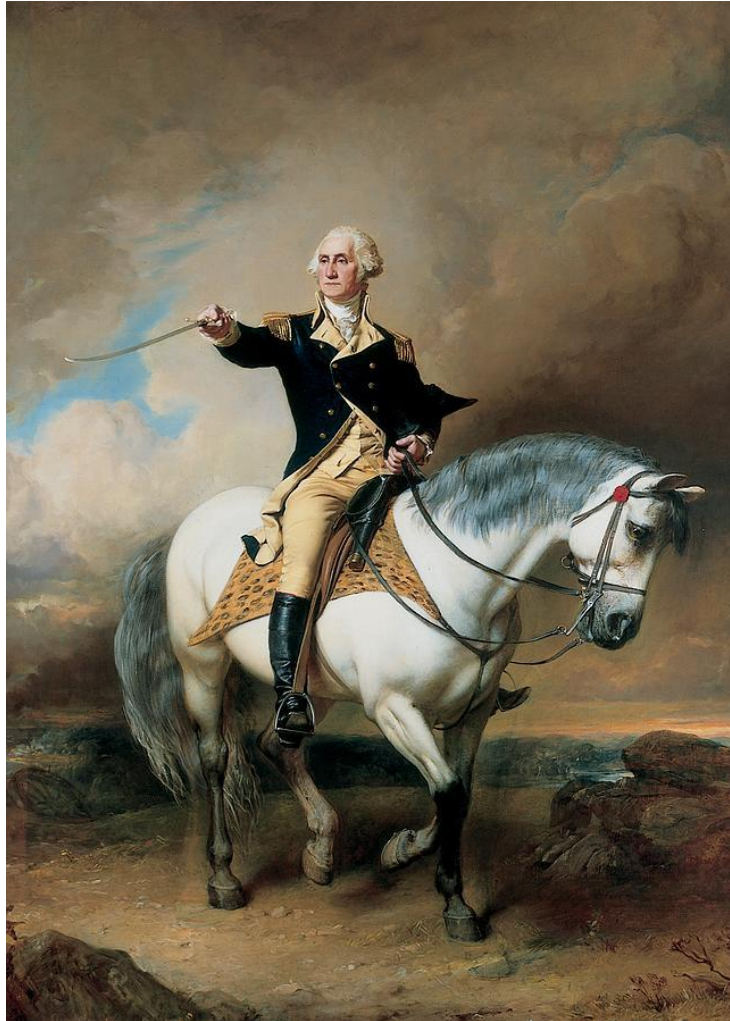


Snapshot of History and Context of Washington, DC (45 minutes)	Science of Learning and Development (1 hour)	Equity and Innovation Research Survey (15 minutes)
<p>Thursday will bring us to several sites across Washington, DC. Please read and listen to the following pieces to help build your context about the history of the city.</p> <ul style="list-style-type: none"> » Read Washington DC Water Crisis Contamination » Read How Segregation Shaped DC's Northernmost Ward » Listen to NPR's 'Barely Treading Water': Why The Shutdown Disproportionately Affects Black Americans » Read City Within A City: Greater U Street Heritage Trail (pg. 1-5, 17) 	<p>In preparation to our visit to Van Ness Elementary, please read the designers primer. It is encouraged to read the entire primer by planning to tackle it in multiple settings. However, we understand that might not be feasible, if you are short on time, please be sure to read pages 7-12 and go in depth on at least one factor of your choice. If you are visiting with a teammate or team, feel free to break up sections to read amongst yourselves!</p> <ul style="list-style-type: none"> » Read: A Designer's Primer on the Science of Learning and Development » Watch Van Ness Strong Start » Read Van Ness Canvas 	<p>Please take 15 minutes to complete the following survey. The information shared here will inform future inspiration and learning visits!</p> <ul style="list-style-type: none"> » Complete Equity and Innovation Survey
<p style="text-align: center;">Reflect</p> <ul style="list-style-type: none"> » How does the understanding of the history of a place impact the way you design or serve in that community? » What resonated with you when reading the primer and learning about Van Ness? 		

Amending History: An Equity Activity

Distinctively, the equity session on amending history described below was my way of providing a memorable and useful experience that elucidated the importance of sharing the concealed and resistance stories that are not commonplace in our history books as a means of giving voice to those either omitted or silenced. It honored aspects of critical consciousness in that it invited participants to critically think about the stories we know in history, the stories that do not get to be told, and who has the power to author the stories of others. At the conclusion of this activity, I asked educators to think about how they will amend history in their work and bring to the fore the hidden or silenced stories of their communities.

Agenda + Details	Connection to Equity, Community, History
Amending History: An Equity Session	<p>In this activity I leverage Titus Kaphar's works of art to ground in an equity activity that helps participants better understand the four types of stories told in history (stock, concealed, resistance, and counter stories). After getting an introduction to each, we then reflect on whose stories get to be told and whose history makes it into our own schema and memory and ask ourselves why that has happened. From there, participants research a traditional work of art that Kaphar's artwork is based on so that they can then contrast the "amendments" that Kaphar makes in his artwork to shift the narrative and bring to the fore the narratives that are often concealed in history.</p> <p><i>Reflection Question</i></p> <ul style="list-style-type: none"> • <i>How will you amend history in your work and in your role?</i>



Washington Receiving a Salute on the Field of Trenton
by John Faed, featuring Blueskin, 1865



SHADOWS OF LIBERTY, 2016

By Titus Kaphar

George Washington sits astride a white horse; one outstretched arm grasps a saber pointed towards an unseen field of battle. Covering his face and the top portion of his torso is a cascade of shredded strips of canvas, each featuring a painted name that appears to be written in Washington's own hand. If pieced together, every strip reproduces a single page from his personal ledger, titled: "Negros, Belonging to George Washington in His Own Right and by Marriage." This document details an annual accounting of every enslaved individual residing on Washington's farm in a given year. Each strip is nailed into the lower part of the figure's face and wrapped tightly around the top portion of his bust, appearing almost as battle armor. The gesture of nailing pieces of canvas is inspired by the ancient tradition of African fetish objects. They are not inserted as a kind of violence and critique, but as symbols of faith in both the object and the object's power into which they are being nailed. This piece is now part of the permanent collection of the Yale University Art Gallery.

Appendix M

Quotes from Inspiration + Learning Visit Post-Survey

- The conversation on amending history most advanced my learning because it opened my eyes to the fact that with a little design thinking I can tell the concealed stories of brilliance to motivate others around me.”
- “We are hoping to open [our school] in one of the poorest zip codes in San Antonio. Over the course of 2018, I visited over 30 schools in low-income communities and have been taken aback by the non-developmentally appropriate practices and harsh disciplinary standards in these communities. Our kids deserve so much more and we want to be as thoughtful as possible in designing an educational environment that is aligned with the developmental learning needs of our future students.”
- “I live and work in DC and I have one child in the DCPS system. I want to learn with other educators and also see the city through their eyes. I also want to learn and observe from Transcend about how the organization creates powerful adult learning.”
- “I internalized the purpose of getting adult learners way outside their comfort zone to reflect on key learning experiences and how those do or do not align with learning science. The visit to Van Ness also demonstrated the power of a strong organizational partnership.”
- “We need to take our staff on field trips.” I can imagine a series of trips to places throughout our community that would help ground our process and provide us with some amazing new insights.”
- “I’m thinking a lot about the Van Ness empathy interviews and partnership with families and communities about what they most want to build in partnership with schools. This should always be a key step in our ideation.”

Appendix N

Characteristics of White Supremacy Culture by Tema Okun and Kenneth Jones

perfectionism	sense of urgency	defensiveness
quantity over quality	worship of written word	only one right way
paternalism	either/or thinking	power hoarding
fear of open conflict	individualism	I'm the only one
progress is bigger, more	objectivity	right to comfort

Equity Assessment Rubric, Funders for Lesbian and Gay Issues



Tool 2: Frameworks & Approaches, Understanding Inequities in Your School

	EQUITY-NEUTRAL		EQUITY CONSCIOUS	DIVERSITY AND INCLUSION	STRUCTURAL EQUITY
Description	Omits roots of inequities (race, class, gender, etc.) for consideration—instead references alternatives that focus on individual characteristics		Argues for equity as a variable in canvas /school design, notably in understanding how outcomes vary	Focused on diversifying canvas/school as a way of better addressing the changing demographics of our country and world, diversity defined broadly as culture, experience and points of view	Moves beyond individual and institutional inequities to explore how a broader system of long-held historical policies, practices and values across institutions have created hierarchies of power and continue to produce inequitable outcomes in well-being for people
Purpose	To achieve mission and goals without naming inequities explicitly in problems and solutions		To ensure that policies, programs and practices account for how racial inequities shape outcomes of well-being	To foster a diverse institution for better achieving institutional prosperity, unleashing innovation and creativity, and strengthening public appeal, impact and effectiveness	To examine and address the multiple systems impairing the well-being of diverse people
Critiques & limitations	Ignores the persistence of inequitable disparities in outcomes of well-being, the manifestations of inequity in opportunity domains and vast research showing how policy benefits and program services are not received equitably by all		Some equity-conscious proposals rely on stereotypes; play down or dismiss the intersection of race, class, gender, sexuality and others; and may not be rooted in solutions that examine the root causes of inequities	At times conflates categories of inequality (marginalized populations) with categories that merely denote difference (work styles, political partisanship). Further, more salient definitions typically focus on race & gender, excluding sexuality, gender identity, etc.	Not enough attention is paid to how structural inequities intersects with oppression; also, given the magnitude of structural inequities, strategies to address it are complex and might be more difficult to implement
Other	Inequities are neither examined nor addressed. Strategies are supported without examining inequities		Strategies address how race and ethnicity shape experiences with power and access to opportunity. Strategies explored for relevance to specific outcomes	Concerned with diversity in staff, students, and partners. Emphasis placed on diversifying stakeholders	Sharpens the focus on outcomes, uncovers patterns of inequity, separates symptoms from causes, reveals how inequities relate to all groups and can be used with other lenses

Adapted from Funders for Lesbian and Gay Issues

Appendix O

Summary of Equity Design Choices

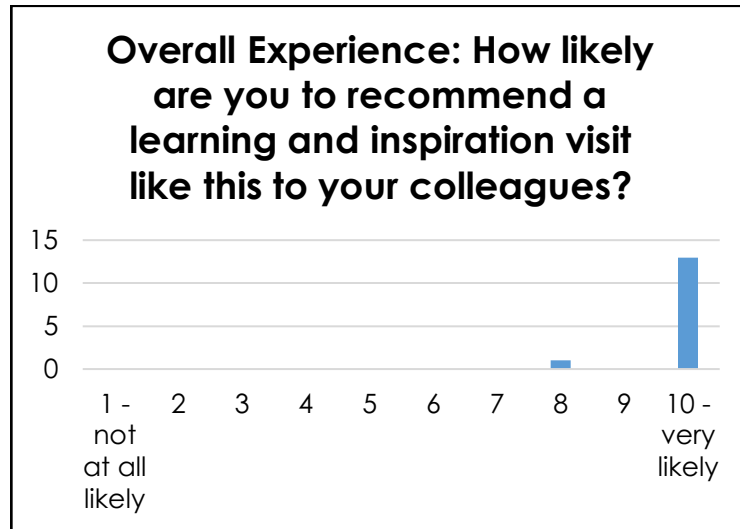
- design teams are meant to be intentionally diverse and inclusive and coaches encourage bringing in families, students, community members, and historically marginalized groups of people to have a part in decision making
- for activities meant to provoke thinking and increase familiarity, we have created assets that educators can take with them and use with others so that knowledge can spread to more than just the people attending a learning experience (e.g. the designing for
- learning cards summarize the key factors of the science of learning and allow a quick and easy way to audit experiences and be more intentional in honoring the science in their designs and actions.)
- each convening includes inspiration – either a visit to a place or a panel of experts that serve as a catalyst to spark new ideas, thoughts, and feelings
- the locations we choose to visit are places that every community has or are civic institutions that reveal deep ties to the history of a city or town (e.g. there is a wastewater treatment plant in every community and the same learning experience participants had in DC can be done in their own communities.)
- we contract with and choose to spend money in a way that lives into our value of diversity and equity
- pre-work or preparation for learning experiences is focused on useful reading, videos, or actions that build context and content knowledge



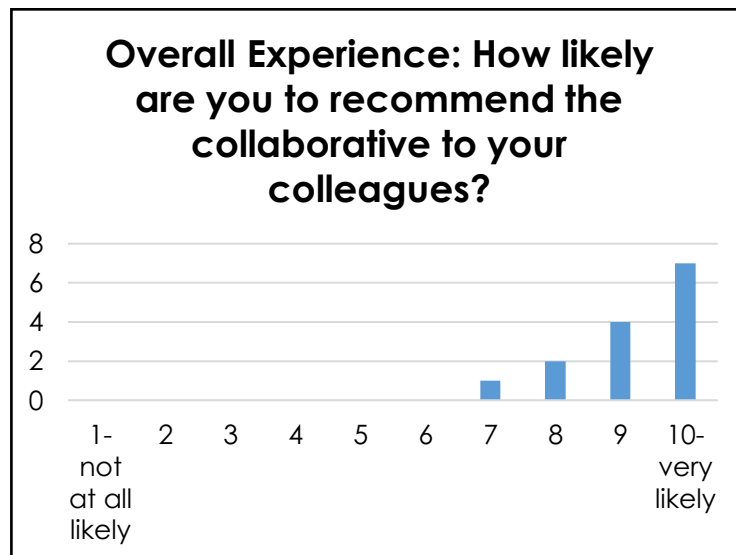
Appendix P

Net Promoter Score Collaborative vs. Inspiration + Learning Visit

Inspiration + Learning Visit Net Promoter Score

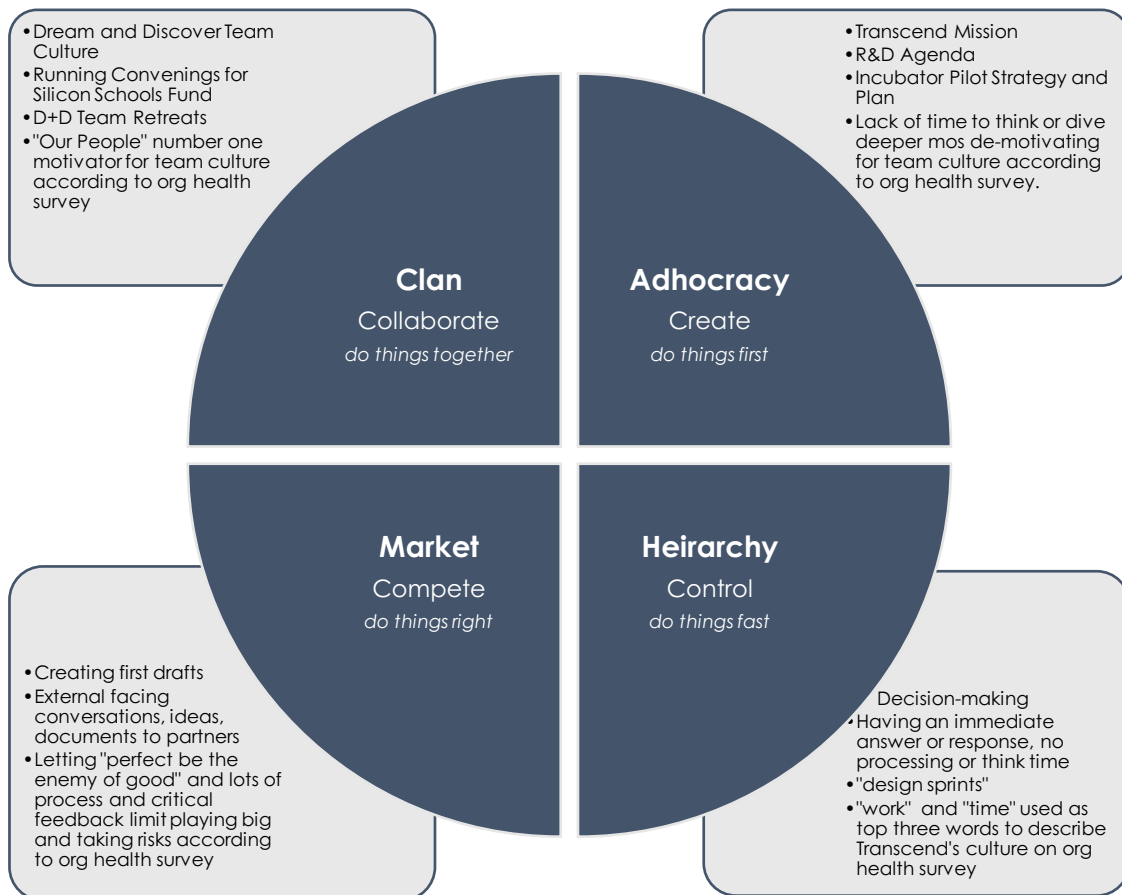


First Collaborative Net Promoter



Appendix Q

Competing Values Framework and Transcend Culture

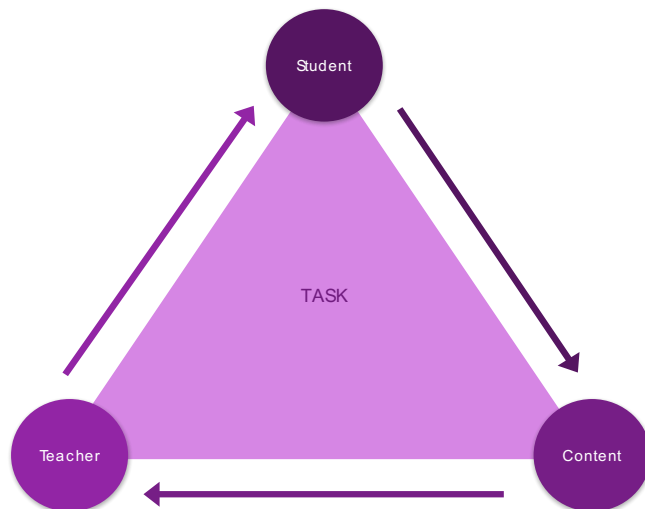


Appendix R

Incubator Design Team Sprint on Instructional Innovation

Instructional Core Big Bet

Incubator Design Team



Student (Engagement)
<ul style="list-style-type: none">- Learner- Person who is learning- Kids are doing heavy lifting and working harder than the teacher
Teacher (Knowledge + Skill)
<ul style="list-style-type: none">- Deliverer/vehicle by which learner acquires new skills- Could be an adult, computer program, another student, role of teacher at the time.- Curator/facilitator/coach - teacher decides what the product is and defines the task.- Setting the bar for rigor
Content (Rigor + Relevance)
<ul style="list-style-type: none">- Learning objects (textbook, video, learning materials) anything learner uses to develop knowledge and skill to complete the task.
Task (What Students Are Actually Doing)
<ul style="list-style-type: none">- What are kids doing and what are they actually doing- Observably

How might we...

Christina	<ul style="list-style-type: none"> Help founders feel/believe/experience the understanding that what students do is what students learn? Assimilate this understanding of "instructional core" into the scope/scale of what we do with partners?
Kirsten	<ul style="list-style-type: none"> How might we expose D&D partners to really strong examples of rigorous "instructional core" but that also are not just "doing traditional school better"? Push teams to examine the current state of their instructional core? Support teams to be ambidextrous and strengthen instructional core while also innovating?
Sarah	<ul style="list-style-type: none"> How might we support founders to innovate in ways that challenge the status quo in the instructional core (not just design add ons to a traditional approach)? How might we encourage "disruptive innovation" –the Uber or school?
Crystal	<ul style="list-style-type: none"> Help founders articulate a vision of excellence that bridges graduate aims, signature experiences, and teaching and learning in classrooms? Use the instructional core as a change management method to help founders see one decision impacts all things? How might we articulate a full journey to a disruptive innovation?

Instructional Core MVP Brainstorm

Signature Student Experience for Instructional Block

Overview/Rationale: Each day (Monday-Thursday) scholars will have a 30-minute intervention block. The purpose of this block is to provide targeted remediation and extension on key math skills that are critical to master with automaticity and fluency to help deepen their critical thinking and practice with analytic problem-solving.

Instructional Block Non-Negotiables (or alignment to Graduate Aims)

PREPARATION	Scope and sequence of interventions is pre-planned and tied directly to interim and quiz assessment data.
SELF-EFFICACY	Intervention is predictable and tailored to the individual/personalized needs of each student to promote increased self-efficacy to normalize "wrong answers" and failure as opportunities to improve.
JOY	Intervention is full of joy and celebration modeled by teacher incorporating joy, songs, rituals, and recognition for exemplary effort and work
LEARNING SCIENCE	To manage cognitive load - new skills are introduced monthly with no more than 2 skills/day, 8 skills/week OR 1 skill remains constant while one skill rotates (5 skills/week)
DIFFERENTIATION OF TASK	
TEACHER R+R	
SUCCESS DEFINED	

Instructional Core MVP Brainstorm

Signature Student Experience for Instructional Block

Component + Time	What the TEACHER is doing	What the STUDENTS are doing
Check-In 3m	Teacher welcomes students to intervention with a song or quick warm-up + check-in	Scholars self-identify the kimochi that identifies the feelings they are having entering intervention
Cumulative Review 5-7m	Teacher reviews skills through rapid questioning, songs/chants, call and response. Where skills are presented visually, clearly and easy for scholars to see. Skills are pre-planned using Scope and Sequence and student data.	100% of students participation in songs and review of material with appropriate volume while independently utilizing their materials if needed (paper and pencil, counting chart, etc.)
New Skill Intro 5-7m	Teacher explicitly outlines the steps of the skill with an emphasis on the mistake students are making - asking students to share why this is a smart mistake that was tricky.	Students are implicated in sharing where they got tricked in their classwork/exit ticket and the correct way to re-do.
Review of Student Work + Smart Mistake Articulation - 3m	Teacher hands out exit ticket or classwork to students with clear feedback. Students are rewarded with a sticker for ID'ing their smart mistake and articulating it back to the teacher.	Students review their feedback and self-identify what skill they must work on based on their smart mistake.
Re-Do 5-10m	Teacher explicitly outlines the steps of the skill with an emphasis on the mistake students are making - asking students to share why this is a smart mistake that was tricky.	Students are implicated in sharing where they got tricked in their classwork/exit ticket and the correct way to re-do.
Exit Ticket 3m	Teacher hands out exit ticket that pushes scholars to practice cycled skill and new skill.	Student complete exit ticket showing TQW (top quality work)
Celebration 1m	Teacher asks students how they would like to celebrate or appreciate one another for their smart work	Students choose the way they want to be celebrated or appreciated.

Appendix S

Inspiration and Learning Visit Proposal FY 2019-2020

A proposal for the role of Inspiration in Dream & Discover – and beyond – in FY20

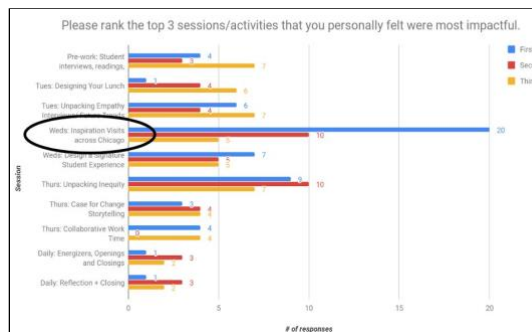
March 6th, 2018, V1

WHY

Since the beginning of the Collaborative in 2016, a core part of our work with early-stage school designers has been to plan and lead experiences for them to seek inspiration from provocative schools and other organizations to provide fodder and new ideas for their own design process. In almost every Convening, we have dedicated at least a half day to getting out in the world to seek inspiration. Some examples of this include:

- Small group visits to 1-2 schools, such as Roses in Concrete and Khan Lab, during Convening 1 in 2016
- A full-day of inspiration across NYC in May 2017 focused on Transformation + Leading change, in which the cohort divided into 7 pathways and each visited a school, an incubator, and a community based organization.
- A stand-alone 2-day inspiration and learning experience in DC in February 2019 focused on history, equity, and learning science.
- for members of the Incubator, former partners, and members of our network,

In all of these experiences, we have gotten rave reviews. When held during a Convening, Inspiration Visits are consistently one of the top rated parts of the Convening when participants are asked in the survey which experiences were most influential for them.



*"The learning visits that were facilitated by Transcend were also instrumental in broadening my horizons. **Every single learning visit I went on shaped my thinking and added another layer to how I reimagine schools and learning.**"*

*"The school was **both incredibly similar and incredibly different to my context. This produced powerful realizations.** The dance class was so different and forced me to think differently about learning. This produced equally powerful realizations. Coupled... what an experience."*

*"I believed school need to be re-imagined before, but **I was not dreaming big enough.** I was still thinking within the confines of the system. Working with the Collaborative (and visiting schools, in particular), has me **dreaming bigger than ever before and believing that something totally and completely different is possible.**"*

We believe our inspiration experiences are both successful in and essential to our D&D process because:

- **"Showing" is more powerful than "telling."** Pedagogically, we structure our Dream & Discover experiences in a way that aligns how adults learn best, which means minimizing the amount of "sit and get." Inspiration visits are a powerful part of that.
- **Seeking inspiration is an essential part of a good design process.** People get new ideas by being out in the world, not sitting around in their own context. In our process, we also provide participants a structured time to debrief and make meaning of what they saw or experienced, which helps them apply their insights to their school designs and ensures that these visits are more than just fun field trips.
- **We don't just visit schools.** We believe it's essential that people look to other fields and types of organizations as they explore what their school designs could be. This also sets us apart from many other education organizations who organize school visits.
- **An inspiration experience with us often catalyzes partners to plan their own.** In the process of leading visits for others, we're also building capacity for people to do this on their own.

The process of researching, building relationships, and visiting other schools and organizations in the process of planning and leading inspiration experiences is a long-term play for Transcend. It helps us both broaden and deepen our network of innovative schools and organizations, which we can leverage with current and existing partners. It helps us dig our well before we are thirsty. And it plants seeds for future possible partnerships.

1

Given the wild success of this part of our work over the past three years, we're proposing that we ramp up our Inspiration work, so that we can get even more types of people and partners to experience the impact of our work. We propose that we focus in on three new types of work related to inspiration, including:

- 1. Standalone 2-day inspiration and learning experiences**
- 2. Curating custom inspiration experiences for people**
- 3. Build assets for inspiration for the D&D journey**

These offerings will allow us to experiment with different ways of putting our work out in the world, including ways that explicitly allow others (i.e. funders, potential future partners) to get a window into our work without attending one of our private cohort events. This approach would allow us to formalize some of the work we're already doing informally. Additionally, it would also allow us to explore new and different ways of partnering with existing schools and organizations that are doing catalytic work in a way that is mutually beneficial, to include building assets that could be used in Convenings and coaching with all of our larger D&D partners, and even beyond Dream & Discover.

WHAT

The following is an articulation of what these three offerings and/or projects could look like.

1. Standalone 2-day inspiration and learning experiences

Building off of our inspiration and learning experience in DC this February, this offering would be a standalone experience for 15-20 people. Across two days, the group would visit 1-2 schools or organizations, be exposed to some of our content, and have time to reflect and make meaning of the experience. These standalone experiences would be centered on a unifying theme. Themes might mirror parts of our current D&D journey (i.e. Exploring the Future; the Science of Learning; Testing your Ideas; Innovating in the Instructional Core). They could also center around a specific graduate aim (i.e. Agency; Purpose; Identity Affirmation), or one of the 8 great leaps (i.e. Personalization; Engaging Families and Community Members).

For example:

An experience focused on **Exploring the Future** might involve spending 2 days in the Bay Area, in which we...

- Lead participants through the Probable/Possible session and explore our future trend cards
- Eat lunch at a restaurant where food is made by robots
- Visit 2 businesses centered on future-focused industries
- Attend Happy hour with some entrepreneurs
- Lead an extended visit to a school that has made design choices centered on what the future will demand
- Debrief the 2-day experience, distill insights, and plan for how they'll take this work back home with them.

An experience focused on **Engaging Families and Community Members** might involve spending 2 days in Chicago in which we...

- Visit a school that has a highly successful or unique approach to engaging families to learn about their approach
- Eat lunch at a restaurant that is an institution in that community and hear from their founder
- Attend and observe a community-led meeting at a school in the evening
- Meet with community organizers focused on reducing gun violence in the South Side to learn about their work
- Lead participants through a session around how to build a strong and diverse design team
- Debrief the 2-day experience, distill insights, and plan for how they'll take this work back home with them.

Participants or “users” of this experience might include: members of our Incubator, past Dream & Discover partners, funders who want exposure into our work, members of the Yellow Hats League, members of Build and Test design teams, and possibly members of the general public.

Recommendation for FY20: We should run 3-4 of these events across the year, as a way to pilot if this is a type of offering we’d want to provide more extensively in the future.

2. Curating custom experiences for people

We get frequent asks from partners and people in our network for recommendations of places they should go visit in order to be inspired. Currently, we field these requests in a one-off way, which can be low-lift, but as these requests add up, the lift becomes higher. In order to keep this low-lift, we also are not typically able to tailor our responses to what that partner or individual might be looking to see or benefit from seeing as a part of their work. Because we are further from the process, folks also often only end up going to see schools, even though they would likely benefit from visiting non-schools, too.

We would break this offering into three levels of intensity. Estimated time required for a Transcend team member to do this work is in parentheses:

- Light touch: send them some ideas in an email (“15-30 minutes of work)
- Medium touch: hop on the phone with them to understand what they’re looking for, spend 2 hours doing some research and pulling together ideas / making connections, hopping back on the phone with them to talk them through our suggestions, and how co-plan how they’ll lead the experience (“3-4 hours of work)
- Heavy touch: actually planning and leading (live in person) a custom 1-2 day experience (“3-4 days of work, including both planning and execution)

It’s important to note that *we already do some version of light and medium touch curation*. In FY19, we’ve done this for Tier 1-2 partners (Kim Oakes / KIPP X twice; Spring Branch’s collaborative; STRIVE) former partners (Collegiate), for other people in our network (asks Jeff gets frequently), and for our team internally (for retreats; asks that surface in slack with the YHL). Part of the goal of naming this as a project is to help make this an explicit part of our work, so that we can account for it in our allocations, in addition to improving upon our approach here.

Participants or “users” of this experience might include: former Dream & Discover partners; a Dream & Discover design team that wants to go deeper around one of their graduate aims; current Build/Test partners; members of the YHL; other people in our network.

- As a real example from this year: Kim Oakes from KIPP X tells us, “we want to take 10 school leaders and senior leaders to go be inspired, where should we go?” We could either provide medium touch support by hopping on the phone with her, learning more, doing some research/curation, and coming back with our list, and helping her plan this experience. Or, we could provide heavy-touch support, and actually plan and lead the experience for KIPP X.

Recommendation for FY20: We should experiment with 1-2 “heavy touch” custom experiences for a partner or member of our network, as a way to pilot if this is the type of offering we’d want to provide more extensively in the future. We should continue providing light and medium touch support to Tier 1-2 partners and former partners as it comes up. We would be able to leverage the ever-increasing pool of schools and non-schools that we’d recommend people visit based on the scouting that’s done throughout the standalone inspiration experiences, and other relationship building work.

3. Building Assets for Inspiration in the D&D journey

One of Transcend’s two key roles is to help advance the innovation journeys of a large quantity of school communities. This is Dream & Discover’s core charge. We don’t expect that all of our D&D partners will go on to build catalytic models; rather, we anticipate that their innovation journeys may include adopting or adapting strong elements of existing models that align to their emerging graduate aims and vision for their school community. However, in our current D&D journey, we do not yet

have a systematic way of exposing people to what other school innovators and designers in the field are up to in service of sparking inspiration and helping to connect partners to these types of models that they may choose to adopt, adapt, or emulate.

Therefore, as a part of this larger inspiration effort in FY20, we'd propose dedicating time and resources to begin experimenting with building some assets to support this effort of exposing D&D partners to what is out there in the field, that may inspire them, or that they may want to adopt/adapt. This project would sit at the intersection of D&D and Codification work, and would give us the opportunity to try out a different type of partnership with a school is further along their innovation journey.

Here's an example of what this could look like:

- We know that as they progress in their design journeys, one type of innovation that partners are often interested in is creating experiences for their students where traditional instruction pauses for some period of time, and the school community engages in a different type of work together. An example of this would be STRIVE's Intersession, which they piloted in Collab 2.0. We also know that schools in our network -- formal partners or otherwise -- have this type of experience as a core part of their model. Examples include Greenfield's Expeditions, and Long-View's Build Week.
- This project would seek to "capture" some of the work of these existing models in some type of asset or collection of assets, which would serve to tell the story of this element of the model and serve as a point of inspiration for school designers who are in an earlier stage. Concretely, this might look like us spending a week at Long-View to document one of their Build Weeks via Instagram Stories, collecting all of the artifacts that teachers used to plan the week and that students created in the process, and putting it up on a website with a narrative that we'd co-create with the Long-View team. We could do something similar with Greenfield, and begin to build up a "bank" of these types of artifacts, videos, and narratives that our partners (and possibly the public) could intentionally explore as a part of their innovation journeys.

With a bank of these resources, we could build additional structured time into our work with D&D partners -- either in a Convening or in Coaching -- as a sort of "virtual visit" for them to explore what others are up to across the field. This could and should happen at multiple points in their journey: likely early on for the purposes of seeking inspiration, as well as later down the line when they have a stronger idea of their vision and want to do further research and/or explore adoption. These assets can support and complement the work already underway as it relates to Cynthia's Innovative Schools Project.

In addition to zooming in on specific model components like Expeditions or Build Week, we could also focus on building assets that are centered on graduate aims. For example, *what does student agency really look and sound like when it's done at the highest level?* Immersive assets and tools that help school designers more deeply understand these graduate aims will help support them to build more rigorous, comprehensive and aligned experiences for their students.

This type of partnership and asset building would provide mutual value to both Transcend and the partner (i.e. Long-View or Greenfield in the scenario above). For us, we would be building our bank of resources and assets to draw from and point people to in our work with partners. For the partner, this would provide a set of tools and resources that they could use to help tell their story and spread their ideas to schools across the country. We have other partners in our network who have expressed interest in working with us in this way, including Manhattan Country School and St. Benedict's.

Recommendation for FY20: We should experiment with one of these types of projects in the Fall of FY20 and build some concrete assets. After learning from this experience, we should consider how we move forward in the second half of the year.