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The Work that Binds: Strengthening Organizational Leadership Development through College and Career Readiness Framework Development

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

Submitted by
Tami Ann Christopher

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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This capstone is dedicated to

Hunter and Sophia
Acknowledgements

This journey was not easy and almost ended before it began. With God’s grace, I’ve been able to persevere. Family, friends and colleagues came together to make this dream a reality and supported my family along the way.

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Abstract

For over 40 years, the non-profit organization Our Piece of the Pie (OPP) has served community needs in the south end of Hartford, CT. It began in 1975 as Southend Community Center serving a low income population ranging from newborns to seniors through a variety of programming. In 2005 the organization restructured and became “Our Piece of the Pie” with a focus on “helping 14-to 24-year-old urban youth become economically independent adults.”

Programs were organized and designed around youth development, workforce readiness, and academics. Perceived to be the most unique tenet of the organization by youth, staff, and funders, was its Youth Development Specialist (YDS) model. The YDS were staff members hired to provide each youth a caring relationship with an adult that was consistent and positive.

Since 2005 the organization developed and sunset various programs in response to funding opportunities, community needs, and decisions made at the executive and board level of the organization. Often, the programs that OPP offered to youth were based on state or federal funding and began, were modified and ended with the funding streams. As a whole the organization lacked consistently articulated youth competencies to support its mission. This was evident in interviews with both internal and external stakeholders as well as through researching the organization’s website, internal documents and consultant reports. Not all programs that OPP developed or participated in provided equitable
opportunities for youth participation. The organization’s culture became fragmented as programmatic departments were organized around funding sources. This structure and culture impeded opportunities for shared learning and innovative practices and created a sense of competition among departments. This sense of competition was only heightened when, as part of a national trend, legacy foundations and other federal funders moved away from general funding and towards providing funding that was more targeted and often left gaps in areas such as administrative and operational costs for non-profits (Berardi, 2019).

This capstone describes a strategic project designed to help OPP identify a framework of college and career readiness (CCR) competencies (in support of helping youth become economically independent adults) that would integrate programmatic areas to improve consistency, shared learning, and innovation in the organization. The work of developing the CCR framework provided the backbone and context for helping staff develop a culture of consistency, shared learning and innovation while they improved their personal leadership skills.

An important component of this project was embedded personal leadership development support. Team members were introduced to several leadership tools and strategies designed to help them move the work. The CCR framework was work that needed to be done in the organization and provided relevant context for the team members to develop their leadership skills. These tools and strategies were grounded in adult development theory.

I began the work by reviewing the mission statement for clarity and the team struggled to identify a definition for “economically independent adult.” The team did
realize success in identifying a few key competencies that would support CCR across the agency despite this initial setback. My research and findings and the work of the CCR team supported OPP’s later decision to revise its mission statement and align competencies to the goals of that mission. OPP engaged in organizational mission and theory of change work soon after the CCR Team was assembled and the work of the CCR team aligned with much of the theory of change work.

The CCR team also found some success developing personal leadership skills that enabled individuals to work through difficult conversations around the concepts of social services, cultures of dependency, race, and other high risk topics; these skills were also helpful during the organizational wide theory of change work as, as a larger group some of the same topics were discussed. The team members had an opportunity to practice and develop these skills within the CCR team prior to having such conversations with a larger group.

This strategic project serves as model, having both successes and challenges, as to how a youth development, non-profit agency can utilize leadership development (built on adult development theory) to build collaboration across programmatic areas in support of building a culture of shared learning and innovation. Additionally, the project highlights how the internal level of clarity around the organization’s mission can impact the development and implementation of competencies the organization uses to achieve that mission.
Introduction

There is no standard definition for “At-Risk Youth” but it is estimated that there are almost 4.6 million of them in the United States and over 39,000 in Connecticut (Burd Sharps & Lewis, 2018). Our Piece of the Pie (OPP) was a 5013C youth development organization that focused on this population through its mission of being “dedicated to helping 14- to 24-year-old urban youth become economically independent adults.” Generally, at risk youth are youth “for whom the probability of successfully transitioning to adulthood and achieving economic self-sufficiency is low.” (Koball, 2011). “At risk” youth are also referred to as “opportunity youth,” “disengaged youth” and “disconnected youth.” These terms do not have a standard definition nationally or even in Connecticut but identifying indicators of these youth include chronic (1 year or more) lack of connection to meaningful work and or school opportunities and may include one or more risk factors such as substance abuse, lack of connection to a caring adult, responsibilities as a parent or caregiver, and physical and/or mental health challenges (Belfield, Levin, & Rosen, 2012, p. 5). Common metrics used to define these youth nationwide include drop-out rates, chronic absenteeism, disciplinary actions, and academic achievement (Parthenon-EY Education Practice, 2016).

I was excited to begin my residency with OPP as much of my career and doctoral study was focused on helping youth from marginalized communities make the bridge from secondary to post-secondary education. I am passionate about helping youth discover their talents and interests, set goals, and understand how to navigate systems of work and education to reach those goals. I was also happy to be working in my home
state of Connecticut because I had a network of colleagues in the field with whom I could connect in order to strengthen my residency work. I designed an entry plan that would support my learning in the area of youth development organizations and alternative education programs and help me understand both the historical and contemporary context of OPP. My plan included learning from internal and external stakeholders as well as historical organizational documents and media. I began by connecting with staff (teachers, youth development specialists, drivers, administration, and the executive team) from across the agency and the board chair. I was able to meet with over 42 (out of 70) internal individuals at least one time and several individuals multiple times. I also conducted 4 focus groups with staff from each program department. I met individually with over 10 youth that were enrolled in at least one of the programs offered by OPP and sat in on 4 meetings between a youth and their youth development specialist, a capstone presentation, 2 intake interviews, a few classes, and student work experiences. I also met with community partners that had contracts or other experience with OPP including those that were at the initial meetings when OPP was being conceived as an agency, a consultant with the state department of education, 2 foundation representatives, and others that had connections with OPP. In addition to personal contacts, I also reviewed the organization’s website, external consultant reports, internal staff surveys, board meeting notes, and other historical documentation. I researched and interviewed staff at other youth development organizations, funding institutions, and alternative education programs for points of comparison.

OPP began in 1975 as Southend Community Center (SECC) assisting children, youth, families, and seniors in Hartford, CT. After a 2010 organizational assessment,
facilitated by consultant David Hunter, the organization became “Our Piece of the Pie” focused on “helping 14- to 24-year-old urban youth become economically independent adults.” Programs were organized and designed around the 3 pillars of: youth development, workforce readiness, and academics to support youth. Additionally, and perceived to be the most significant tenet of the organization, was its Youth Development Specialist (YDS) model. This perception was articulated in both internal and external interviews that I conducted. One director at OPP described the YDS as “the glue” that held the youth to the programs (Hooker, 2018). The OPP board chair Ms. Jordan Coe described the YDS as the “core of the business” (Coe, 2018). One of the earliest individuals involved with the creation of the SECC was Alan MacKenzie, current owner of Street Smart Ventures LLC. Mr. MacKenzie explained how the early model for engaging youth centered on a work and learn model and then the focus moved from this contextual education to the YDS model (MacKenzie, 2018). The YDSs developed consistent and holistic relationships with each youth in the agency, no matter which OPP program the youth was involved with. Bob Rath, OPP President and CEO from 1994-2017, described, “OPP’s unique model is centered around a personal, intense and consistent relationship developed between each youth and a caring, committed and proactive adult staff member” (Rath, 2018). Rath retired in 2017 and Enid M. Rey was appointed CEO in July of 2017 after a nationwide search.

The organization supported between 70-80 employees and served approximately 1600 youth in 2016. Over the years, OPP added and sunset programs in response to both the community’s needs and shifts in funding sources. Some examples of this within the last 10 years include:
The loss of Court Support Service Division funding from the State of Connecticut which resulted in OPP decreasing the amount of youth served

The loss of funding from Capitol Community College (CCC) that supported a program that paired a YDS with a struggling CCC student in order to improve student retention

The loss of Hartford Public School (HSP) support for a program that paired students taking coursework at HPS’s Journalism and Media Academy with an OPP supported afterschool internship program

The loss of funding from the Walmart Foundation in support of the youth summer employment program which decreased the number of youth that could participate

The addition of the Hartford Youth Service Corp program with support of the Hartford Mayor, Luke Bronin

The addition of a workforce program focused on re-entry youth due to a shift in policy and funding between the CT Department of Children and Families and the CT Juvenile Justice System

The loss of the Junior Art Makers program due to a loss in funding

The addition of a program for expelled students from Bloomfield Public Schools

OPP funding was dependent on a variety of both large and small grants, a small donor base, Department of Children and Families, state education funding funneled through the various public school districts, and fundraising. During the time of this writing it was
organized under two main service components: these were the community programs referred to as “Community” by OPP and education programs, referred to as “Schools” by OPP. During my first few months of residency my focus was on the Schools area including the admissions process, curriculum, staffing structure, student outcomes, data use, and understanding to what degree the educational programming connected with Community.

The Schools component was the newest arm of the organization and provided an alternative education environment for students who were under-credited and over-aged in their home district high schools; these students were not on track to graduate with their class. OPP began working in alternative education by servicing students in Hartford Public School’s “Opportunity High School” in 2009. In June of 2018 these alternative programs included: Hartford’s Opportunity Academy and The Learning Academy of Bloomfield (both located in OPPs Hartford headquarters) as well as the Path Academy Charter School in Windham. My early discussions with Ms. Rey and an OPP education consultant, Cam Vatour indicated that my strategic project would be aligned with needs in Schools.

When I began my residency with OPP in the summer of 2018, Path Academy, led by new principal Gino Lorrico, was undergoing an investigation by the State Department of Education (SDE); this investigation was opened in May of 2018. One of my initial research opportunities was to attend Connecticut State Department of Education hearings where Path Academy’s fate was being discussed; I heard testimony from students, parents, teachers, administers, board members, and Ms. Rey to get a better understanding of the situation.
The SDE had concerns regarding discrepancies with enrollment, attendance and other data. The Windham Charter School Organization was responsible for that data and the day to day operations of Path Academy; OPP, as the school’s charter management organization (CMO) facilitated the charter school’s finances and made recommendations on aspects of the school, but had no authority to operationalize those recommendations. In July of 2018, Windham Charter School Organization surrendered its charter for Path Academy to the SDE. OPP pursued conversations with Windham Public Schools (WPS) to collaborate on how best to serve the youth that The Path Academy previously served but ultimately, WPS did not collaborate with OPP in this effort other than to utilize space in the Willimantic OPP facility.

OPP strategized on how best to move forward with the facility that once housed the Path Academy (OPP had a mortgage on the property) and how to support the youth that once attended this school and were again being serviced by Windham Public Schools. This situation consumed a great deal of time of the new CEO’s first year entry period and has not yet been resolved. Ms. Rey and I discussed the immense impact this situation had on her entry as not only a consumption of her time but also as an unexpected realization of the status of the organization; she was not aware of the Path Academy challenges, nor the strain this situation had on the OPP when she accepted the CEO position. Another concern for Ms. Rey was whether or not the state was going to attempt to pursue potential overpayments. As Sheila Cohen, president of the Connecticut Education Association, the state’s largest teachers union stated, “We encourage the state to pursue Path Academy’s charter management organization, Our Piece of the Pie, to recoup the nearly $1.6 million in taxpayer dollars lost to apparent fraud and questionable
practices” (Megan, 2018). Additionally, OPP had a substantial mortgage on the facility and no longer had income generated by the Path Academy to pay that mortgage. At the time of this writing, OPP continues to struggle with the financial impact of carrying the facility and the state has not sought any reimbursement for the alleged overpayments.

Opportunity Academy and The Learning Academy of Bloomfield were located in OPP’s leased Hartford facility (also housing the administrative staff and the majority of the YDS and support staff). The School’s staff included, a principal, certified teachers, tutors, a YDS director, a guidance counselor, administrative assistant and a team of YDS staff. The main goal of these programs, as expressed by a senior staff member, was to “graduate them [students] by the age of 21” (Anonymous, Senior staff, 2018). These education programs also provided wrap around assistance through the YDS model, sometimes bridged the youth to the other programming offered by OPP’s community arm, and helped the students create a post-secondary plan.

After the Path Charter was surrendered, I discussed with Ms. Rey, Mr. Rivera, and School’s Principal, Mr. Rodney Powell individually as well as in executive team meetings as to whether or not OPP would remain committed to offering alternative educational program due to the cost, outcome performance and enrollment, sustainability of contracting with Hartford Public Schools, and possible internal staffing changes. Additionally, there was some question as to whether or not the situation with Path lessened OPPs credibility in the community as a competent provider of alternative education programming.

During the late summer, Ms. Rey asked me to continue my work learning about Schools and researching best practices in alternative education. I interviewed current
students and teachers and all of the administration that worked in Schools. I also sat in on a few classes and attended a capstone presentation as well as reviewed various curriculum and organizational documents as part of my research. Externally, I researched other educational programs nationally, attended related events such as the Hartford Public Schools “State of the Schools 2018” presentation and visited other CT alternative education programs. Ms. Rey asked me to assist with the development of a strategy and presentation for a meeting with the Hartford Public School superintendent, Dr. Leslie Torres-Rodriguez. During this time, I also discussed with Ms. Rey and Mr. Rivera (who was recently assigned some supervision responsibilities over Schools) other ways to help support schools in light of possible organizational staffing changes.

Because OPP had a substantial mortgage on the facility and no longer income generated by the Path Academy, it had and at the time of this writing, continues to have a significant financial impact on the organization. The Path Academy closure also had impact on the other areas of Schools. The detailed context of the Schools’ challenges are important to the context of the organization, not only because it was the main area of my organizational learning and research focus for several months and the intended focus point of my residency project, but it also highlights the significant political, financial, and structural challenges facing OPP and its new CEO upon my arrival.

The community arm of OPP ran numerous programs including: Youth Service Corps, Hartford Youth Business, Hartford Youth Development, College for America, Pathways to Careers, and Re-Entry Programs and were divided into three organizational programs (Workforce, Work 2 Learn, and Youth Service Corps) run by three directors. Each director oversaw a team of YDS staff. These community programs occurred both in
Hartford and in the Norwich/Windham area and serviced youth from a variety of backgrounds including those involved with or under the care of the Department of Children and Families (DCF) and justice involved youth. They provided services and skills training such as financial literacy, youth employment opportunities, connection to workforce certificates, youth support groups (young women’s interests, young men’s interests, etc.) career preparation, life skills and more.

Both the schools and community arms of the organization were expected to provide programming, education, and skills development in support of OPPs mission: “helping to create economically independent adults.” There was not a clearly articulated set of competencies that the organization uses to define “economically independent adults (EIAs). The programs run by the organization, as primarily dependent on grant, donor, foundation, and various state department funding, each had its own set of guidelines and expectations tied to the funding. The funding sources that OPP utilized often provided a set of objectives/expectations that OPP reported on as part of the funding requirements, or as in the case with Hartford Public Schools, as was required by contract. It was unclear as to what degree the reporting requirements consistently mirrored the objectives/expectations in support of the organization’s mission.

The concept of EIA was often articulated among the staff as being synonymous with “college and career” (CCR) ready. There was an understanding that being an EIA was aligned somehow with being college and career ready but there was no intentional alignment. Many staff and students referred to CCR (in name or concept) in conversations, focus groups, and interviews I held during my entry period and during the course of my residency. CCR components were also evident in some of the individual
student plans (ISPs) and post-secondary plans in community and schools. The organization did not have competencies around CCR nor did it have CCR articulated as part of being an EIA as stated above. My entry research indicated that CRR was understood at various levels of competency throughout the organization and that training and professional development around CCR was not provided with intention or consistency within or across programmatic areas.

In addition to the context provided on the services and history of OPP above, the entry of Enid M. Rey Esq. as CEO in August of 2017 was also of significant importance to OPP’s organizational context. Ms. Rey is a lifelong Hartford resident and spent much of her professional career in Hartford’s non-profit landscape and in Hartford Public Schools. As a first time CEO, Ms. Rey was outspoken with her staff and professional contacts regarding her leadership stretches in this role and embraced her leadership learning edges. She exhibited a very different style of leadership from her predecessor of 24 years and was interested in shifting the culture of one from a hierarchical, top down decision-making structure (as evident in external and internal interviews and focus groups) to one that embraced and valued more insight and direction from the direct service staff and directors. Upon entry, Ms. Rey introduced the concept of “OPP 2.0” to the staff which included looking at her concept of the “4Ps of process, policy, practice and protocol.” She articulated this as her area of focus for the organization and OPP 2.0 was underway when I arrived. Throughout residency, Ms. Rey often sought my feedback and support as a thought partner in private discussions we had regarding how her leadership style, approach, and action interacted with the challenges and opportunities of OPP. The concepts that Ms. Rey articulated as important to the culture she wanted to
develop in order to set organizational priorities at OPP coincided with a framework she unveiled moving into her second year called, “OPP Strong.” The “Strong” referenced: Strengthening together the results and opportunities that nurture growth for youth and staff.

Ms. Rey provided OPP an opportunity for change when she introduced OPP Strong because it provided a new lens for thinking about the work, in that she wanted to create systems which supported a culture valuing shared learning, continuous improvement, innovation and accountability driven by data. Some of the barriers that OPP had to overcome in support of this initiative included the method in which programs and departments were financed, historical organizational culture, new leadership, staff changes and pending staff changes. These barriers are evident across the agency through research I gathered internally and externally, interviews with staff at all levels, and exemplified in the previously described challenges with Schools.

Over the course of many discussions with Rey regarding how my interests, education, and experience aligned with the organizational needs, we considered numerous options for my strategic project. Some of the projects we discussed that spanned the time between my initial interviews through September, included:

- working with Path Academy to help the new principal develop a leadership team
- Assist OPP in developing a policy agenda that supported the unique needs of Opportunity Youth
- Research the best structure for OPP Education (private, charter, etc.)
- Help Schools create and implement continuum of curriculum and work across programs
• Help OA and LAB engage and highlight youth voice
• Design a strategy to improve organizational coherence
• Help OPP develop competencies around its mission statement

It is important to note that when OPP made a commitment to bringing me on as a resident, funding for the residency position had not yet been secured. The organization was hoping to be awarded a Barr Foundation grant to support the cost of my residency, so many of the considerations for my project not only needed to align with my needs and expertise, and needs of the organization, but also with the requirements of that grant. This situation illustrates an example of how intertwined funding opportunities were with the way in which OPP worked; the Board had authorized my residency without a secure funding strategy in place. Ultimately that grant did not come through.

As the deadline for my project proposal came due, I increasingly became concerned that we had not yet decided on a strategic project to focus on during my residency. I was highly engaged in Schools providing research and support to Principal Powell and Mr. Rivera and had other responsibilities such as serving as on the standing committee for the Connecticut College and Career Readiness Alliance, leading a planning team for a full staff retreat day, assisting with agenda and facilitation of the executive team meetings, and other side projects, but did not have my project solidified. I met with Ms. Rey on August 28th to present some specific focus points for my project, but we were unable to agree on a project during that meeting; we decided that the topics were too broad, too narrow, and some were not resonating with Ms. Rey amidst the continued turmoil in the organization. In this meeting I explained to Ms. Rey that I was still struggling with the fact that my research identified ambiguity around the mission
statement; it seemed like gaining clarity around the mission statement was the best place to start to help build coherence in the organization and identify competencies that supported the mission. Rey explained that from her perspective the organization was just not ready for that type of work given the challenges in other areas. I sought counsel from my advisor, Dr. Eileen McGowan and my 2\textsuperscript{nd} committee member, Dr. Lisa Lahey. During these discussions I looked for both strategies to design a good project that would add value to the organization and fulfill my needs as a resident. We also discussed leadership strategies to help Ms. Rey and I to solidify a project that would meet these needs.

Ms. Rey and I met in early September to finalize my project. I approached Ms. Rey with an idea focused in on two main areas: college and career readiness and individual leadership development in support of shifting the culture at OPP to one of shared learning and innovation. The organization’s mission of “helping urban youth become economically independent adults” could be supported with the competencies of preparing youth to be college and career read. This concept became clear to me after researching what OPP considered to be important as part of helping youth become “economically independent.” The organization did not articulate competencies for reaching economic independence, but I discovered through focus groups, organizational documents and reports, and interviews with staff and students, several themes in this area. Some of these themes including helping youth understand how to: navigate post-secondary options, become skilled in personal financial literacy, and develop self-management skills such as persistence, time management, self-regulation and dependability. I also cross referenced college and career readiness competencies with
economic independent competencies in the research literature. I determined that an organizational wide framework for college and career readiness was needed to help the organization articulate with consistency what competencies they were building in youth and to help staff work efficiently across programs to achieve the same outcomes for youth. I proposed that this framework would also help identify gaps in services and staff competencies. This work would be important to the organization even if the Schools programming was sunset or reimagined.

As Ms. Rey and I discussed my strategic project being centered on creating a framework of college and career readiness for OPP youth, we also discussed how my project might align with culture change work at the organization. We had several discussions about Ms. Rey’s vision for a culture shift at OPP. These discussions included topics such as the desire for creating cohesion amongst the various departments and programs, leadership development among all staff, providing opportunities for staff voice and generally focusing in on OPP being “a great place to work.” (Rey, CEO, Our Piece of the Pie, 2018). We also discussed that OPP’s organizational culture must be a model for the youth the organization served.

As I conducted my research, interviews, focus groups, and reviewed a staff surveys and consultant reports, several strong themes emerged: staff were passionate about driving success for youth; lack of collaboration and coherence mirrored the structural division of programs; there was a lack of clarity and data around the mission statement, youth outcomes and performance; and staff wanted voice and input on the way the organization operated. I met with Ms. Rey almost weekly during the first 2 months of my residency and discussed these themes with her. The findings regarding staff passion,
lack of collaboration and coherence, and request for staff voice did not surprise her; in fact, Ms. Rey and I discussed these issues as early as October of 2017 as I was exploring residency options. The other theme - lack of clarity and data around the mission statement, youth outcomes and performance - was starting to become evident to Ms. Rey as well but had not been an area we discussed as a priority focus during our earliest conversations. I again indicated my struggle with trying to understand how the programs identified the work to be done and areas of improvement if the mission, competencies, and outcomes were not clearly defined. Ms. Rey explained how her leadership strategy at the time was working with in the 4 P’s policy, protocol, process and practice). This was the way in which she was trying to understand and strengthen the foundation of the organization before reengaging with this strategy oriented work. In order to get at the heart of this work, Ms. Rey articulated that a culture of trust, shared learning, and support of staff development must be built. I agreed that this type of culture would help the organization engage in mission, competency, and performance work.

Our discussion led me to look into various organizational culture approaches such as learning organizations and change management (Garvin, 1993). I introduced Ms. Rey to the concepts of “deliberately developmental organizations” (DDOs) and we discussed this as a possible long term goal for OPP culture. We both participated in the return to campus visit as part of residency programming during which Dr. Lisa Lahey presented on DDOs. A Deliberately Developmental Organization is an organizational culture that supports each individual’s growth as part of the day-to-day culture and work of the organization (Kegan & Lahey, An Everyone Culture: Becoming a Deliberately Developmental Organization, 2016). As opposed to offering prescribed professional
development trainings and conference, each individual is on a journey of continual development in the context of the work they do every day. Benefits of this culture can include increased organizational effectiveness and efficiency and job satisfaction. In a DDO everyone is working on themselves and on improving the work every day. This concept is similar to a school that has the tools and capacity to develop an individual learning plan with each student and consistently discusses progress and readjusts as needed. In theory, each student would progress according to their own needs and as a result the entire school would perform better. Just as in a school however, the conditions must be right for DDOs to be successful. The organization must be ready, willing, and able to take on such a culture shift.

Ms. Rey and I discussed how to begin to build the conditions for cultural change that are important to becoming a DDO including valuing each individuals learning and journey, having effective communication tools, and building an environment of trust. Additionally, we discussed what organizational challenges OPP needed to address and how would a DDO help solve those challenges; one such challenge was the lack of collaboration between departments but could becoming a DDO help with that? We decided that a start to this foundational work could begin as part of my strategic project.

This framing resonated with Rey. We concluded that my project would be two-fold. I would assemble a CCR team that would (1.) develop a college and career readiness framework for the organization as a whole and (2.) build leadership skills of team members by learning adult development theory and practicing tools focused on improved communication. The college and career readiness framework would be of value to OPP even if the Schools arm of the organization was discontinued or modified because
The community programs could also use the CCR competencies to support their work. The leadership development aspect of the project would help staff the organization begin to lay the ground work toward becoming a DDO by improving communication skills and collaboration within and across programs- this would create some space for people to grow. I had discussions with Ms. Rey and Mr. Rivera regarding the supervision of this work. We agreed that Mr. Rivera would be the supervisor of record because of his proximity to the staff and the programmatic work and that Ms. Rey would remain my mentor in residency. The strategic project MOU was finalized in the end of September, 2018.

**Review of Knowledge for Action**

There are two areas of research I needed to focus on for this strategic project. The first was college and career readiness and the second focused on finding tools and approaches to help the team develop personal leadership skills.

Having worked in college and career readiness for over 10 years and having focused much of my Harvard studies on the topic, I was able to draw on experience as well as explore new research. I was particularly focused on the demographic of youth that OPP was working with and quickly realized that attempting to categorize these youth was not as clean as I thought it might be due to the wide range of youth served, variety of programmatic offerings, and lack of accessible data. OPP youth came to the organization for a variety of reasons and from a variety of backgrounds. Additionally complicating was that youth entered OPP through one of the alternative education programs or one of
the many community programs. It was important to understand who our youth were before a framework of supports was identified to help them achieve college and career readiness.

There were a variety of entry points in which a youth could engage in OPP programs. There were 4 main departments: Youth Service Corps, Work 2 Learn, Schools, and Pathways to Careers. Within these programs there were also multiple entry points. For example, Schools has an alternative education program for Hartford students (Opportunity Academy) and Bloomfield students (Bloomfield Learning Academy) and a program for students expelled from Bloomfield Public Schools.

Whether or not a youth was eligible to enroll in one of the many programs that OPP offers was dependent on the qualifiers of the various programs. These qualifiers included: age, income, justice involvement, income level, employment status, referrals, interviews and more. These qualifiers differed from program to program and the level of control each program had on making enrollment decisions varied. To further complicate enrollment, specific definitions around some of the qualifiers were non-existent or were defined differently in different departments. For example, “attendance” was defined differently in Opportunity Academy than it was in the Southern New Hampshire University initiative operated out of the Workforce program. Often times, the qualifiers were specified by the funding sources. Some departments and programs required youth contracting and others did not. For example: Pathways to Careers did not use a youth contract, but adhered to funder, Workforce Innovation and Opportunity Act’s (WIOA), qualifying factors. Work 2 Learn however, has a comprehensive application and contract outlining data use, expectations for youth, discrimination policies, and more.
What was common in the demographic that OPP served was that the majority were youth of color from lower socio-economic backgrounds, aged 14-24 years old. Many came from challenging situations that included being teenage parents, having or being around substance abuse, food insecurity, homelessness, and other trauma - inducing backgrounds. Additional subgroups of youth that OPP worked with included: English language learners, justice involved, learning disability identified, students struggling with mental health and foster youth. The academic level of the youth ranged from very highly motivated and skilled to those with low motivation and low skill and nearly every combination in between. Many of OPPs youth were the first in their family preparing to attend post-secondary education. Although these youth were often dealing with signification challenges, it is also those challenges that helped them develop some of the most important “college and career” skills. An initiative of the Urban Strategies Council connecting opportunity youth to employment highlights that, “[these youth] have to perform a constant balancing act, making tough decisions as a means to survive… This learned ability to manage a full plate in one’s personal life and also perform at work are what make opportunity youth highly qualified for the healthcare workplace” (Decker, 2017). Habits of success such as problem solving, creativity, persistence, and critical thinking are often strongly developed in opportunity youth but there was a tendency (internally and externally) to view OPP youth as deficient based rather than asset based.

There are a few different ways in which I approached the college and career readiness work. The first was through asking, “what are the specific competencies that our youth needed to be career and college ready?” This was the more technical side of the work. I began internally looking at the mission statement:
“Our Piece of the Pie (OPP®) is a nonprofit organization dedicated to helping 14- to 24-year-old urban youth become economically independent adults. OPP’s unique model is centered on the personal and consistent relationship developed between each youth and a caring, committed and proactive adult staff member. That relationship helps youth overcome barriers and to access support services in fields of best practice in Youth Development, Workforce Readiness, and Academics. We work with youth to achieve the goals of high school graduation, a college degree and/or vocational certification and rewarding post-education employment” (Mission, 2018).

I also reviewed the theory of change work for youth service corps, various logic plans, and consultant reports, and other historical OPP documents. There were some references to skills but most of the documentation highlighted outcomes rather than competencies to achieve those outcomes.

In the field, there are varying definitions of college and career readiness geared toward different audiences. For example, The College Board offers a suite of SAT assessments beginning in middle school to help students prepare for college readiness through academic testing. They have informational resources listed on their website for parents, students, and educators. The United States Department of Education refers to rigorous academic standards and higher order skills (USDE, 2018). The National Association of Colleges and Employers (NACE) identifies 7 competencies for career readiness: critical thinking/problem solving; oral/written communications; work/collaboration; digital technology; leadership; professionalism/work ethic; career management; and global/intercultural fluency (NACE, 2018). The State of Connecticut uses the definition from Association for Career and Technical Education and National Association of State Directors of Career Technical Education Consortium which states that college and career readiness “involves three major skill areas: core academic skills and the ability to apply those skills to concrete situations to function in the workplace and
in routine daily activities; employability skills (such as critical thinking and responsibility) that are essential in any career area; and technical, job-specific skills related to a specific career pathway” (Research, 2018). There are seemingly unlimited additional resources available online that provide parents and students checklists and advice in support of college and career readiness. This research was important to explore and was used in the team work as we attempted to align the needs of OPP youth with a college and career readiness framework, but I was also interested in scholarly research that specifically targeted the population that OPP worked with through a developmental lens particularly because the organization places a high priority on the relationship between each youth and the youth development specialist (YDS).

A developmental lens offered a language and deep roots perspective to help youth develop and achieve readiness for their post-secondary plans. As highlighted in *Ready, Willing, and Able*, “practitioners who work with young people to support postsecondary planning often focus heavily on college knowledge and awareness” (Savitz-Romer & Bouffard, 2014). The deeper need, particularly with students that are traditionally under-represented in post-secondary education, is to understand how to engage these youth through developmental theory, helping them develop a post-secondary identity. A post-secondary identity is comprised of the envisioning of aspirations and goals combined with the expectations and beliefs that a youth has about their post-secondary future (Savitz-Romer D. M., 2017). Youth must find their aspirations and beliefs to be compatible with other aspects of their identity and this is often difficult for youth who do not have experience or support in and/or from the communities in which they live. Additionally, opportunity youth are exposed to high
stress situations which often create persistent and negative self-images for these youth that follow them into their thinking and future planning (Koball, 2011, p. 3).

Although much of this research relates to post-secondary readiness, the competencies and identity work highlighted are very relevant to career preparation as well. Former University of Oregon professor and policy analyst, David Conley states that, ‘career readiness requires not only most of the same foundational academic knowledge and learning skills as college readiness, it also requires program-specific foundational knowledge” (Gerwin, 2016). OPP was ripe for incorporating youth development theory as the YDS model that OPP employed was the backbone of the work that OPP does with youth in all programs as previously discussed. The YDS and other staff at OPP must embrace, understand and utilize these and other related theories to be most successful in helping youth achieve CCR (Arnold & Silliman, 2017, p. 16). “The role of supportive adults is not simply to raise aspirations but to identify when youth experience a discrepancy, help them understand where the discrepancy comes from, and help them resolve it” (Savitz-Romer & Bouffard, 2014).

YDS staff come into the organization with a variety of different backgrounds and are hired using different criteria depending on the program that hires them. There is no agency wide agreement on what the qualifications and experience of a YDS should be; additionally, YDS staff across the organization receive different onboarding, training, and professional development. I anticipated that this situation would strongly impact the team’s mindset and supplemental professional development regarding youth development theory would be necessary for sustainability. Some specific areas of support that youth
development theory would address included: identity, motivation, short and long term goal setting, hope, self-advocacy and agency, and resilience.

The other area of research that I needed to explore was identifying what type of professional leadership would be most effective given the current environment of the organization, the CEO’s goals, the time frame I had to work with, and the needs of the individual team members. The word “silos” was used repeated during my entry to describe challenges the organization faced internally. I began my research looking into various ways organizations addressed this challenge. I had also recently worked with a non-profit educational organization also struggling with this organizational challenge, and drew knowledge from that experience.

Silos are not entirely bad. If every person at OPP was trying to work with every youth at OPP the result would be chaotic, confusing, and unproductive. Silos can provide space for expertise to develop and for a team to develop a sense of identity and common purpose. The challenge comes when silos become so strong and self-protective that they inhibit the work, discourage innovation, and negatively affect relationships and internal culture. They are problematic when “…our classification systems become excessively rigid, and silos dangerously entrenched, this can leave us blind to risks and exciting opportunities” (Tett, 2015, p. 247). My entry interviewed indicated that when staff at OPP referred to silos, it was only with a negative connotation additionally, a staff survey that was conducted just prior to my arrival mirrored my interview feedback in this area with 25 negative comments (out of 71 staff responding) regarding communication and connectedness between departments (Christopher, 2018).
It was also important for me to understand the historical context that created these silos. There was a point in OPP's history when the programs were much more cohesive. Based on a review of the history of OPP through interviews and documents, it was apparent that the silos became stronger and problematic when general funding sources began to dry up and funders became much more specific with the target population, outcomes, and methods they demanded as conditions of funding the work. The funding context of OPP is not uncommon in the non-profit sector. This funding formula can often cause strain in a non-profit organization; when departments or programs rely on specific funding streams there may be temptation to stretch or somewhat stray from the organization’s mission in order to secure the funding. This model also impedes organizational innovation and learning. Additionally, programs/departments may perceive or be in actual competition with each other for funding. “Fiscal constraints lead to territorialism, which has a chilling effect on trust and collaboration…” (Nelson, 2018). Two examples that I discovered highlight this point in OPP.

The first is regarding the way in which unrestricted funding flows back into the whole of the organization’s general operating funds. Rarely a private funder will allow for a particular percentage of a grant to be used as the organization sees fit; smaller, more nimble funders are increasingly providing unrestricted funding but the legacy foundations have historically been lacking in this area (Berardi, 2019). The few unrestricted monies that are received by OPP through private funders average between 10-15% of the total grant (Houldcroft, 2019). During my interviewing, I spoke with 2 directors and 3 YDS staff whose impression was that
the funding their department brought in paid the salaries of individuals in other departments; there was animosity around this conversation in all 5 examples.

The second example of negative siloing I discovered had to do with the actual structure of the youth development specialists across the agency. Prior to 2014, the YDS staff were structured under their own department. Soon after that and due to funding (as discussed in an OPP theory of change meeting on February 8, 2019), the YDS staff were segmented into departments. No longer did they have a common onboarding, professional development opportunities, or opportunities for shared learning; such activities were now managed by each director. This exhibits itself today as a lack of consistency among the qualifications of new YDS hires and the varied approaches that YDS use to work with youth.

I also looked at the other structural changes that had taken place at OPP and discovered that programs had been reorganized around funding structures. There was no clearly articulated process for determining whether or not a program was appropriate for OPP and the majority of the programmatic decisions were made by CEO, Hector Rivera (Rivera, 2018). The commodity had become funding and the youth work was organized around the programs; program areas sometimes responded to funder reporting needs rather overall objectives of the organization. The backbone department of the OPP model, YDS forming one-one relationships with youth, was divided and YDS were deployed to various programs and worked under the supervision of the directors of those programs.

“Over time, the structures, culture, and defaults that make up an organizational system become deeply ingrained, self-reinforcing, and very difficult to reshape” (Heifetz, Grashow, & Linsky, 2009, p. 51). OPPs organizational culture exemplified this condition.
I looked deeply into adaptive leadership theories as an approach to both help Rey prepare OPP staff for embracing DDO concepts and as a way to build collaboration across programs to develop the CCR framework. Building a strong CCR framework that would be appropriate to the organization as a whole and sustainable would require that the team work closely together and be able to share and learn from each other in an authentic way. Given the cultural context of OPP as discussed previously, a small team which included representatives from all departments would be a way to begin to develop adaptive leadership concepts that could be used to move the CCR work. I determined that the organization was ready to begin this work because both the issues of CRR need and culture change need were apparent across the agency (Heifetz, Grashow, & Linsky, 2009, p. 126).

The culture Rey envisioned was “one that activates and deepens moral purpose through collaborative work cultures that respect differences and constantly build and test knowledge against measurable results – a culture within which one realizes that sometimes being off balance is a learning moment” (Fullan, 2001, p. 44). This concept related to OPP’s passion around helping youth succeed; need to work across programs, and improve the data culture while leading through change. I saw the potential of the CCR team to be a vehicle to help the organization begin adaptive change through the context of moving important work (college and career readiness) forward. Utilizing this team, I hoped to, “… encourage people to reflect on their classification systems and how they organize[ed] the work, or to even turn those taxonomies upside down. Mental reorganization can sometimes be almost as effective as structural change, particularly if those two shifts go hand in hand” (Tett, 2015, p. 197).
I considered how to address the fact that each individual had little or no formal authority to make policy or structural change in the organization and sought research on how to develop leadership capacity with the team members so that they could lead from a place of informal authority. I anticipated, based on my conversations with Ms. Rey, that the recommendations I put forward from the work of the CCR would hold weight and that the official authority for policy and structural change sat with the executive team and ultimately, Ms. Rey. This concept of helping my team members develop connected with part of the DDO strategy, as people are encouraged to develop a “new capacity of mind…the ability to author a view of how the organization should run and have the courage to hold steadfastly to that view” (Kegan & Lahey, An Everyone Culture: Becoming a Deliberately Developmental Organization, 2016, p. 75). Those that have successfully led without formal leadership authority, “…not only lead within the boundaries of the communities that authorized them, formally and informally, but also across those boundaries, reaching to communities where their words and actions have influence despite having no authorization (Heifetz R. A., 1994, p. 185). As I considered how the CCR team would be created, I anticipated that each individual team member would be authorized by their supervisor to participate in the team and that “leading across the boundaries, reaching out to communities” would be analogous to working across OPP programs.

The next step in my research was to develop and approach to teach personal leadership development strategies/tools to the members of the team. These tools had to be complementary to DDO and adaptive leadership concepts and relevant to the work this team would undertake. Additionally, I considered that I had a short time to work with this
group (4-5 months). Drawing from personal experience in the coursework of Personal Leadership Inside and Out (EDU L104) at the Harvard Graduate School of Education, and given the nature of the team’s work, I considered those tools that would develop the capacity for strong communication and empathy. These concepts/tools were: Deep Listening, The Ladder of Inference, Bias & Blind Spots and Difficult Conversations.

Theory of Action

If a College and Career Readiness Innovation team made up of direct staff from all programmatic areas researches and identifies college and career readiness competencies appropriate for OPP youth and learns new communication strategies based in adult development theory and practices those strategies through tool develops their personal leadership in the areas of communication skills, then they can work within and across programs to identify the current status of those competencies across the agency and will be effective in recommending an organization wide CCR framework aligned with helping youth become “economically independent adults.”
Strategic Project

Design and Implementation

My initial design for the work of this CCR team was two-fold including the content of CCR and individual leadership development through learning and practicing communication skills. Firstly, members would actively engage in creating a college and career readiness framework in support of OPP’s mission by building on the organization’s strengths and current work, identifying gaps, and incorporating best practices in research and in the field. I would facilitate CCR discussion and utilize my knowledge and research to introduce, strengthen, or modify as needed. In this space, I anticipated that the work needed to be owned by the staff and because of that, I wanted to encourage their lived and learned experience in the CCR space. I did however, want to ensure that our framework was researched based and aligned with my OPP organizational research.

Secondly, I would introduce several communication tools help each team member develop their personal leadership. I anticipated introducing a tool, having the team practice the tool in our meeting, and then practice the tool in the context of the CCR work within their departments. This process would help each team member develop and practice their own leadership skills forming the foundation of a culture shift for the organization. I did not have a focus point on strategies on working as a team, but was more focused on the individual skills for this project. Given that the organization

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struggled with cross program collaboration and shared learning I chose strategies around Deep Listening, The Ladder of Inference, Bias & Blind Spots and Difficult Conversations as the leadership tools. I intended to use adult development theory as a background to help empower team members in their development.

I developed the following short/medium and long term outcomes for the project.

Strategic Project Measures of Success:

**Short/Medium-term Outcomes**

- Team members will understand, develop, and utilize communication leadership skills to do the work of the CCR team. This will be assessed through my observation, discussions in the CCR team, a team member survey, and soliciting feedback from supervisors

- The CCR team will develop as a place where team members feel supported taking small risks in their leadership growth and support each other’s growth – both in support of the organizational mission.

- Economically Independent Adult (EIA) will be defined, and 3-5 core competencies will be embraced as defining EIA

- A cross organizational, comprehensive look at 1-2 priority competencies (out of the 3-5) will be researched

- Recommendations on initial steps to strengthen and measure these competencies will be written up and presented to organization

- OPP will have a CCR framework from which to set and modify strategy as needed
Long-term Outcomes (Post Residency)

- An implementation plan will be developed for priority competencies with strong data and accountability measures
- Additional priorities will be researched comprehensively, strengthened, and tracked for improvement based on data
- Initial team members will continue to strengthen their leadership, model for other staff, and encourage a culture of coherence, learning and innovation that will be modeled for the organization’s youth.
- Organizational collaboration and coherence will improve as all programs focus on universal competencies and share best practices.

The strategic project involved the identification and assembling of the Career and College Readiness (CCR) team members. I first reached out to the COO, Hector Rivera and we discussed the strategic project and the team. It was important for Mr. Rivera to be supportive of this project as the directors reported to him and he played such a crucial role in deciding what programs OPP would participate in. The design of this strategic project did not include Mr. Rivera; all of the final discussions I had discussing potential strategic projects were with Ms. Rey although Mr. Rivera and I (as well as other members of the executive team) had discussed the need for consistency and collaboration across program areas on several occasions. Ms. Rey was not in a position to take on this work as a focused strategic priority at this time but was encouraging steps in this direction in my work with the CCR and establishing a collaborative meeting structure
among the directors and executive team as my entry research recommended. Ms. Rey had also discussed her vision of culture change with the executive team, but not the entire staff at the onset of the strategic project. Mr. Rivera indicated his support of the project and stated he was looking forward to the findings. We did not discuss his role in the project other than he asked me to let him know if I needed anything and I asked him to keep me updated with anything going on in the organization that would be of interest to or affect this work.

I next reached out to the program directors as a group to describe the project and asked them to consider which 1-2 members of their team were in the best position to both contribute to the work of the team and to also benefit from the leadership development aspect. I began the recruitment for the team with an individual email to each program director. I had already met with all of the directors during my entry period at least once, and had worked with them on other projects since entry. They were aware that I was learning about the organization as a precursor to helping OPP lead a piece of work. My email included this suggestion: “I am looking for those that work with some aspects of CCR, are open and willing to work on the leadership development piece, and have the commitment and capacity to take on this work.” There was a specific individual I suggested in Schools and at least one individual was suggested by Mr. Rivera; this individual was also in schools. In all but these 2 cases, the directors decided who they would send from their departments.

I then followed up with each director individually to answer specific questions. All directors responded quickly and identified a team member to participate on the team. The inaugural team consisted of a YDS from Work 2 Learn (W2L), a YDS from
Workforce and a YDS from Youth Service Corps. Additionally, I also suggested the post-secondary specialist and Mr. River suggested to the Mr. Powell that director of YDS services from Schools be included. The range of experience was 2 years-19 years of employment within the organization with the average being about 4 years and the age range was also diverse. The group consisted of 2 African American males, 1 white female, 1 Latina female, and 2 African American females.

I had an initial discussion with each team member to explain the project and to understand their questions and expectations. I learned at this time that most of the team members were “volun-told” to participate. This is a common phrase at OPP and I learned from staff that it means individuals volunteer to be part of committees or projects but that there are expectations from directors about that participation. They all indicated and seemed interested in participating but 3 voiced concern about this work competing with other work priorities. I indicated that this work would strengthen the work that they were already doing and help them become better leaders. I also explained that I was very open to learning how the work we engaged in could be improved or structured differently according to their needs and the team goals.

Our first full team meeting was held on October 18, 2018. At the time of this writing, the team had met 6 times (1-1.5 hours for each meeting) the final being on January 17, 2019. I had one team member miss 2 meetings and this is the team member that was strongest in her indication that the meeting time would encroach on her other work. Four other team members each missed one meeting; 2 of these occasions were due to appointments with their youth and an outside partner such as DCF and the other absence was due to a late notice request from a supervisor. It is important to note that in
my conversations with Mr. Rivera, the directors’ group, and the team members, I emphasized that this team and this team’s work would be integrated into the work they were already doing in support of the mission. I wanted everyone to understand that this wasn’t extra work, but a different way of looking and integrating the work for collaboration and coherence and improved relation to mission and youth outcomes. This was important for me to stress because at the onset I wanted to ensure there was value in the work. The organization often brought in consultants whose work did not directly impact the day-to-day work of the staff; I wanted to front load how my work would be different and directly relevant. This concept seemed to be accepted by most of the team members. The evidence for this includes some team members using their work interactions as focus points for the leadership development work (an example was using deep listening with a colleague regarding a struggle that colleague was having with a youth) and also expressing to me and sharing with the group how they used some of the new CCR strategies in their work (an example includes a team member sharing strategies learned from a CCR webinar with her colleagues).

The CCR context of this strategic project was to articulate a framework and vision for OPP’s CCR programming that:

- Identified CCR competencies that aligned with OPP youth needs and organizational mission
- Understood current CCR programing across the organization
- Identified gaps and opportunities
- Recommended 3-5 CCR areas for OPP to incorporate in support of the mission
The leadership context of this strategic project was to build leadership competency in each team member using the following tools/strategies:

- Identifying team values and norms and developing an environment of trust
- Deep Listening: a learning technique in which the listener remains open to information and suspends judgment focusing on both the speakers words and emotions (Itzchakov & Avraham, 2018)
- Ladder of Inference: a tool that can help users identify the assumptions they make based on previous experience, bias, and the reinforcement of those ideas (Kegan & Lahey, Immunity to Change, 2009)
- Bias & Blind Spots: developing the skill to recognize underlying influences on your judgments
- Difficult Conversations: developing the “stance of mind and heart and the skills of expression needed to achieve effective communication across the gulf of real differences in experiences, beliefs, and feelings…” (Stone, Patton, & Heen, 1999, p. vxiii)

I outlined my objectives for the contextual work and utilized the Meeting Wise approach to help me organize the team meetings (setting norms, documentation, agendas, expectations, etc.) (Boudett & City, 2016). I planned to introduce a leadership development tool/concept at most of the meetings and use team assignments as a place for them to practice the tools and then report on them in the meetings and/or in one-ones with me. I built in the one-one option expecting that some team members would not feel comfortable discussing some situations in the group setting despite best efforts to create a
trusting space; I wanted to have this one-one space as an additional option for team member reflection. I also prepared a series of assignments that the team would work on in between meetings. These assignments included background and supportive material around both leadership development and CCR best practices in the field. Based on my previous experience in teaching and leading work groups and given that the organization was in a state of change I prepared to be flexible in this space, understanding that I was still learning about OPP, and topics might come up that I did not anticipate but that needed attention. In addition to the assignments I prepared, other opportunities for learning aspects of CCR arose.

As part of my residency responsibilities, I served as OPP’s steering committee representative to the Connecticut College and Career Readiness Alliance (CCGRA). CCCRA was an initiative supported through Nellie-Mae Education Foundation as part of their “Big Goal...a plan that aim[ed] to reshape public education to reach an aggressive benchmark: at least 80% college and career readiness for every subgroup and New England as a whole by 2030” (McAlpine, 2015). I was able to bring four members of the FIT to a CCCRA conference that focused on pathways to college for underrepresented youth. I was also able to secure a discounted rate to send three of our staff to conference focused on supporting young men of color in post-secondary planning through The Center for Higher Education Retention Excellence (CHERE). The team was also invited to a Big Picture Learning webinar focused on best practices in college and career readiness programs. All of these external resources allowed the participating team members to build their knowledge in CCR and use their developing leadership tools to share this new knowledge with the FIT, improving the understanding of our work. There
were varying levels of CCR knowledge in the group initially. I did not complete a baseline assessment officially, but more as a discussion to understand each team member’s background. None of the team members had been formally educated in college and career readiness. Some had participated in workshops related to student skill development in the areas of social emotional wellbeing and job training and others were self-taught through their own research or learned by doing.

We initially approached the CCR contextual work by beginning with the OPP Mission. In our first meeting, we began with setting norms and identifying shared values. Many of the team members were already familiar with the “Full Value Contract” framework (norms, amends, gratitude, thanks, asks for help) which supported the context for building the kind of meeting environment that I hoped to establish and most described their understanding of the importance of building a trusting environment based on the work they did with youth, but none of the team members recalled setting up such an environment as part of their work with colleagues and supervisors. I also shared again the overview of the project, asked for input, and made point to describe the kind of trusting environment I hoped we would create. It was important for me to clarify my role in and purpose of this project because the team had seen many consultants over the last few years and that was not the role I was in; I wanted to make sure to distinguish that I was here to assist the organization in developing an initiative that provided real value and relevancy to the work that this team was doing day to day. One of the norms that the team set was “confidentiality” so I assured them that I would honor this. I did explain that the work from this project would be written about and explained that roles would be referred
to but not names or titles. I asked that if anyone had additional concerns or questions, we could either discuss them as a group or they could contact me individually in private.

I then began a conversation around understanding the OPP mission with the intent to build trust around a common focal point of the work. I modeled this discussion after many I had had during my entry period with a variety of internal and external stakeholders as well as colleagues in the field. I asked, “What does it mean to be an economically independent adult?” My expectation was that we would use this discussion to begin to build a trusting environment and identify several competencies of what was needed by our youth to become EIAs. At the beginning of every meeting we conducted a check in and I also led a plus/delta exercise at the conclusion of each meeting which we reviewed after check in at the beginning of the next meeting. Often, I or another member of the team would refer to our norms as needed which indicated to me that we were working toward building a trusting environment. The following meetings I hoped, would be centered around us narrowing the competencies and backing them up with research based support. It was in the following meetings, and in the work that the team members would have to do in their departments, that the leadership tools would be practiced.

The team did not come to a working agreement of what an EIA looked like. In fact, the team also began to dissect the phrase “college and career ready” and other key terminology over the course of the first 3 meetings and concluded the following:

- “College and Career Ready” was a phrase that many youth and families found overwhelming
- “College” wasn’t the only post-secondary path that OPP promoted
- “Career” was too long term and committal for youth that needed to reach shorter milestones along the way to be successful and to have other meaningful work before a career
- “Post-Secondary Education” was a term that youth and families did not often understand particularly because high school is not often referred to as “secondary” school. Many team members stated that they did not know what the term post-secondary meant until after they began work at OPP.
- “Economic Independent Adults” was a phrase that was most problematic to the team and was the heart of this work. The team discussed concepts including being on the “system,” holding down a full-time job, benefits, minimum wage, happiness

By the end of the 1st meeting, the team had identified indicators of an economically independent adult as someone who:

- Earned a living wage
- Understood all aspects of personal finance
- Was not on public assistance
- Was self-motivated, accountable, persistent, resourceful
- Was able to overcome challenges
- Understood how to balance wants vs needs
- Understood how to plan short term and long term
The team discussed how being CCR incorporated the attributes of being an economically independent adult. We also had a robust debate around what qualifications and attributes of YDS staff (and other staff in the organization) had in relation to where we were trying to move youth. Questions were raised around the fact that some staff themselves were not economically independent adults by the team’s definition. For example, one team member stated that at least one other staff member that he was supplementing their income with some type of public assistance.

Over the course of the next several meetings we continued to define and narrow both IEA and CCR competencies as part of our contextual work. The team began to identify CCR priorities in three buckets of work which were (1) Self; (2) Others; and (3) knowledge. These were priorities that each youth no matter which program they participated in would master as part of a successful post-secondary and/or employment experience. The initial priorities identified were:

1. Soft skills - example “dependability” – All departments would intentionally offer opportunities for you to develop this skill.

2. Post-secondary exposure to youth across the agency - All youth would be able to participate in college information sessions, financial aid workshops, etc.

3. Financial literacy - All youth would have a broad understanding of personal finance with an emphasis on college and career systems (paychecks, taxes, loans, financial aid, etc…)

During these next few meetings I also introduced the concepts/tools of: Ladder of Inference (one team member was familiar with this and shared a video to the group), Deep Listening, Bias & Blind Spots and Difficult Conversations. At each meeting the
team shared the experiences they had using these tools in their work with their
departments and I intentionally encouraged the use of the tools in the meeting work,
particularly during high risk topics and pair/share work. Some high risk topics included:
systems of oppression, culture of dependency, and code switching. The team, initially
unhappy with the phrase “college and career readiness” voted to rename themselves the
“Futures Innovation Team” (FIT). This term encompassed not the concept of helping
youth develop options for their futures but also highlighted the idea that this team was
thinking in an innovative way. We discussed that they felt empowered to suggest that
youth should have several paths open to them and they felt their own authority in making
this suggestion. “It shouldn’t just be about a 4 year college or a medical coding
certificate,” stated one team member. “We should help each youth get ready to be
successful with whatever they want to do after they leave here [OPP].” Throughout the
rest of this document, the team will be referred to as the “FIT.”

In December I was asked if one of the data systems associates could serve on the
team by Sandra Chessey, CFO. Chessey indicated that this individual was ready for
opportunities to grow in his leadership. I was happy to bring him on board; the team
would be able to use his help understanding of assessment and program development
around CCR competencies. I was additionally asked by the FIT representative from
Workforce, if another member of the Workforce area (who worked specifically with
college partnerships) could participate. This person was a YDS that worked specifically
with college partnerships; I agreed that it seemed a good fit and this person joined. I also
reached out to Schools on three occasions to request that a teacher be recommended for
the FIT team but did not receive a response. The team discussed finding a way in which
to incorporate youth voice in the future but that objective was not yet realized at the time of this writing.

From October through January, I communicated the progress of the FIT team in executive meetings, through my work in conversations with Rey and Rivera, and Jordan Coe (OPP Board Chair), a directors’ meeting, and in a presentation to the Board of Directors. Other than the board presentation which was at the request of the CEO, the other communications were initiated by me. Because no formal reporting on my work was required, this was my way to communicate my progress and setbacks with the work to a broad audience. Additionally, I was able to document this communication in the executive team meeting minutes which I kept.

Externally, I discussed the work of the FIT team progress with a Principal at Education First (as a supporter of CCCRA work), the Vance Foundation, Chancellor of the New Hampshire Community College System, Connecticut State and University System’s Board of Regent’s President, Executive Director of the Connecticut Council for Education Reform, and other’s that had high level influence and/or interest in CCR for opportunity youth. Additionally, I discussed the work with high school counselors, college advisors and others who were direct service points for youth. My discussions with the external stakeholders focused on strategy and work of the team and not on organizational challenges that necessitated this work. There were several reasons I communicate this work with external audiences. Firstly, I wanted to continue to seek best practices in the field and these contacts were often able to help by suggesting other organizations that were doing good work. Secondly, one my goals in residency was to deepen and strengthen my network; some of these external communications were directly
related to my engagement with OPP such as with the Vance foundation others I arranged myself.

In mid-January, I placed the FIT team on a hold due to another organizational initiative involving prior OPP consultant, David Hunter. On October 30th, during an executive team meeting Rey and Rivera shared that they were in conversations with David Hunter regarding to OPPs Theory of Change. On December 11th, in another executive meeting, Rey announced that Hunter would be (with support from the Dalio Foundation) helping OPP “refresh its theory of change” (Rey, CEO, Our Piece of the Pie, 2018). Engaging in this type of work at this time was significant shift in thought for the organization; in previous direct conversations with the CEO I understood that she was not going to engage in any strategic planning in the near future with OPP because of other pressing priorities and because the organization was not in the right place for that kind of work.

I asked Rey if she wanted me to be a part of the early conversations with Hunter as my entry work and FIT work would be informative and she stated that it wasn’t necessary at that time but that I would be part of the team that would be doing the theory of change (TOC) work. I offered that the FIT members would also be a good group to work on the theory of change team not only because of their deep work on CCR but also because of the leadership tools they were developing. The TOC work would include full day work sessions involving direct staff, directors, executive members and a few other staff from development and data. Given OPPs silo culture, the leaderships skills developed by the FIT members would be very helpful. Rey stated that the directors would be nominating people from each of their departments and recommended that I discuss my suggestions
with the directors. I met with the directors and made my recommendations. Four members of the FIT would participate in the TOC session work.

The first official TOC full-day session occurred on January 11th and I was unable to attend. I participated in the second session and was asked to help facilitate at the 3rd and 4th sessions. There are two sessions left in as part of this initial work. David Hunter facilitated the first and third sessions. It is unclear how the TOC work will continue or be implemented at the conclusion of the 6 consultant sessions.

The reporting on my strategic plan, for the purpose of this document, concludes with the first TOC meeting. The CCR work of the FIT team would have been duplicative to the TOC work; in fact, the FIT team completed many similar exercises and thought process that the TOC group work through during the 2nd, 3rd, and 4th sessions. During the onset of the TOC work, I met with the FIT members individually to receive feedback on their experience to date and discuss the next steps for the FIT. The TOC work would be undertaking much of what the FIT was doing with CCR but on a broader scale and related to the mission (which was needed as discussed earlier). This team had been working to help the organization with CCR and also working to develop their leadership. I was concerned about what would happen to the team members that were not part of the TOC work and I was concerned for all of the team members having an opportunity to continue their leadership development. At the time of this writing, I had another meeting scheduled with FIT to address how the team might be repurposed and to understand their interest in continuing the leadership work.

Results
The overarching original goals of the project were two-fold. The first was to identify CCR competencies, find out to what extent they were happening across the agency, and recommend those competencies for implementation across the agency in support of the organizational mission of helping youth become economically independent adults. The second was to help individuals move toward personal leadership development by learning and practicing several communication tools and strategies. I theorized that the improvement of the individual’s leadership communication skills would help them have effective and authentic conversations around the CCR work.

The content work of the FIT was to identify CCR competencies to be implemented across the agency in support of the organizational mission of helping youth become economically independent adults. This aspect of the project has not been as successful as I anticipated. FIT started from the beginning looking back at the mission of “economically independent adults.” This phrase was problematic to the team and we struggled to define it. The struggle in this however, did encourage the difficult conversations surrounding systematic oppression and privilege, and other high risk topics. There was value in these conversations because they brought people from around the organization together across common challenges and helped build coherence and trust. Additionally, these conversations helped highlight some areas that were not intentionally addressed by OPP programming but considered by the team important to consider in future programming with youth and also with staff. As previously introduced the team did articulate a list of specific indicators important to becoming an economically independent adult. These indicators were:

- Earned a living wage
- Understood all aspects of personal finance
- Was not on public assistance
- Was self-motivated, accountable, persistent, resourceful
- Was able to overcome challenges
- Understood how to balance wants vs needs
- Understood how to plan short term and long term

Using the experience in the room as well as research based practices, we cross walked these indicators to skills and knowledge needed to be college and career ready and the FIT members agreed that all except “earned a living wage” and “was not on public assistance” were crucial to CCR. The team shifted to discuss what skill sets, habits of mind, and content was necessary to become “college and career ready.” We identified three domains: self, relating to others, and knowledge. We then choose a priority in each domain.

**Self: Dependability**

**Relating to Others: How to Advocate and Access Post-Secondary Education Systems**

**Content/Knowledge: Financial Literacy**

In the “Self” area, the team identified “dependability” as a leading competency that was crucial to student success in all aspects of CCR. It is evident in the research and team members discussed other examples in which dependability was important to youth success including meeting their obligations in the OPP programs, fulfilling volunteer obligations, honoring appointments for job and college interviews, and the importance of not only being present, but also being engaged and able to follow through, an accountable.

There was discussion around what the domain of “Relating to Others” meant. Overall the team concluded that it was about communication and also being able to read
environments to understand appropriate social norms and being able to navigate those environments. The team chose to focus on the ability to navigate and understand post-secondary systems. “Post-Secondary Education Systems” is a broad term that the team narrowed to identify areas including financial aid/loans, enrollment processes, paths to careers, and basic needs. The discussion around basic needs was more detailed than the discussions around the other three areas. During the basic needs discussion, it was brought up that often opportunity youth don’t understand the assistance available around housing, food, healthcare, and transportation to support those enrolled in post-secondary education often because they are often first generation students. Also, these basic needs may not always be discussed as part of the traditional literature or admissions fairs content that colleges use. This topic also intersected with the Content/Knowledge domain of Financial Literacy.

Financial Literacy was an ideal topic for the FIT to focus on. Firstly, it connected both in research and in practice as being a competency that was crucial for success in CCR as well as in EIA. Secondly, a pilot program was in development and early roll out phase at OPP. This pilot program attempted to reach all youth at OPP no matter which program the youth were enrolled in. The FIT discussed bringing in the staff members that were responsible for creating and delivering this program across the agency. Most of the FIT members did not know what was covered in the curriculum or pedagogy was used in the Financial Literacy program. We did not bring in the Financial Literacy staff prior to this writing.

The process of narrowing and then expanding and basing our reasoning on experiences and research really helped the team to dig in and define concepts from
different perspectives. This process provided an excellent backdrop for the team to learn and practice their leadership skills.

There were three specific short term goals for the leadership development aspect of the project. The first was that team members would understand, develop, and utilize leadership skills based on adult development theory to do the work of the FIT. The second was to develop the FIT meeting as a trusted space in which failure and vulnerability was recognized to help everyone grow their leadership and support each other’s leadership to achieve the organizational mission. The third was that the FIT members would begin to model best practices for the culture Ms. Rey envisioned. There is evidence, which will be described later in this document, that success was realized in these areas documented through my observations of watching the team interact with each other and others in the organization, through direct feedback, and through surveys.

The FIT meetings were a place for me to observe the way in which the team members practiced the personal development leadership skills they learned and gauge the type of environment we were developing. One of the strongest pieces of evidence regarding the environment occurred during the 3rd meeting. We were discussing social services support and one team member, stated, “…what happens in the FIT stays in the FIT and let’s be honest. A lot of the youth we are working with, the African American youth, are coming from families where generations have been using the system as support and it’s just part of the culture” (Anonymous, 2018). I acknowledged the comment and asked if he could explain further and others began asking questions and building on some points that were made. It was a risky topic to engage with. Through this discussion some members of the team were exposed to new ways of thinking about generational
systematic oppression (red-lining districts is an example) and how that might affect the youth we were working with. I had a learning moment in this conversation as well as I thought to myself, “Wow, I’ve heard derogatory conversations around African-American’s being dependent on social welfare such as SNAP but I have never been in a conversation like this where that idea was discussed in context with historical facts.” This conversation included ideas around how OPP might address this with youth in an intentional way and also across programs.

Another example occurred during a discussion about code-switching on December 7th, when one team member asked another if it was her opinion that youth were the only code switchers. The team member asking the question allowed the other to answer the question without interruption and then asked clarifying questions in an attempt to understand the other person’s perspective. I approached team member that asked the initial question after the meeting and debriefed the exchange with her. I was particularly curious because this person, in previous meetings, had been one to cut others off in an attempt to have her voice heard. In our debrief this person explained that s/he were trying to practice the listening protocol that we had learned in a previous meeting; s/he confided that s/he was actively trying to put his/her “defenses” aside and absorb the other persons perspective.

Other examples of success in this area involved the interaction between a FIT member and another staff member outside of the team. Some of my other responsibilities (outside of the strategic project focus) included leading two other committees. I also recruited and led the “2018 Staff Development Day” and the “2018 End-of-Year Celebration” committees. This was the first time that teams of individuals representing
departments across the organization were brought together to organize and lead these events. Several of the FIT members served on these other committees and I was able to observe the FIT members interact and practice leadership. On 10/30 the Staff Retreat Committee, one of the members (who was also on the FIT) listened without comment when another member was expressing her dissatisfaction with the food options offered during a previous event. The comments referenced the ethnic preferences of another staff member. The FIT member engaged in a conversation and used a listening strategy, taking a stance of curiosity, that we practiced in the FIT (Stone, Patton, & Heen, 1999, p. 164). My observation was that she intentionally tried to ask questions for understanding and repeated back what she thought she understood for clarification. During a meeting of the End of the Year Celebration Committee on 12/7, one of the FIT team members explained that she was trying not to go “up that ladder [of inference]” when she was soliciting ideas from her department about the event.

Additionally, I met with each of the team members for a one-one debrief in January. Part of this meeting time was used to discuss future of the FIT and the other part was used to discuss the team member’s experience. Overwhelmingly members communicated satisfaction with the leadership development component of the team and asked or agreed that it should be continued as an ongoing professional development strategy. One member offered that he was skeptical for the first 1-2 meetings but once he felt trust building in the room, he began to participate more.

I also created and distributed a survey so that members could provide somewhat anonymous feedback if they desired. The survey results were somewhat contradictory when comparing complementary questions but overall aligned with the other evidence I
acquired. Seventy-seven % of respondents indicated that participation on the FIT was a valuable use of their time. Thirty-eight % responded that they had learned new leadership skills and 50% responded neutral in that category. Seventy % responded that they intentionally utilized new leadership skills in their work as a result of the FIT. Eighty-three % indicated that they understood other OPP programs and colleagues better and 67% responded that they were better prepared to work collaboratively after the FIT. Thirty-four % responded that they had learned new information about college and career readiness and 33% responded neutral.

I had anticipated soliciting feedback from the directors’ team addressing what changes they observed in their team member. The directors would have had a stronger point of historical context of each FIT member and may have been able to provide a “before” and “after” snapshot of each individual FIT member. The time frame and a shift in priorities due to the TOC work was a barrier for me getting this data. I did discuss my impact on the leadership development with Karen Kakley, Director of Development. She referenced a particular member of the FIT and noted, “[she] would never have been able to give her perspective at the TOC meetings with out the leadership help” (Kakley, 2019).

The third specific goal in leadership was for the team to begin to spread coherence, learning, and innovation modeling across the organization. This is not an area in which I saw much evidence except in the survey responses mentioned above with 70% being able to work more collaboratively but that doesn’t indicate the impact on those they were working with, only their own perspective. There were a few other examples I considered being indicative. Firstly, two members joined after the initial team was created. In conversation with the CFO I understood that she saw value in the team to help
build leadership skills in her team member and was interested in him being involved in cross-organizational learning. The second person joined the team at the advice of another FIT member and with the approval of her supervisor; again, there was an anticipated value in leadership development and cross organizational learning for this person.

**Analysis**

There are two areas that I analyzed for this project; the first was in relation to the CCR content work and the second was in relation to the personal leadership development. My theory of change began with, “…a College and Career Readiness Innovation team made up of direct staff from all programmatic areas researches and identifies college and career readiness competencies appropriate for OPP youth.” We did not fully realize this goal due to two main factors: (1) The content of the project depended on a baseline understanding around clarity of mission that did not exist and (2) the scope of this project was inappropriate for the time allotment and authority level of the team.

At an early part in my entry, I suspected that the organization was not clear in identifying the definition of “economically independent adult” and that theory became fact through my learning and research. When I approached leadership with this analysis, I received feedback that the organization was not in a position to address or change the mission so I continued to look for a strategic project that made sense for the organization and concluded that a CCR readiness framework would help the organization even if they sunset or modified the education arm. The FIT team spent a good deal of time trying to figure out what EIA meant, and this was time that I had planned to use for identifying CCR attributes that would best align with the mission.
As stated earlier, I knew my team was not authorized to revise the mission statement. The problem here was that we needed a clear definition of mission before building the CCR framework.

Looking back I realize that I began our first meeting with the question “what does it mean to be an “economically independent adult (EIA)” not only to get a general conversation going about the overall work that OPP engaged in from my team members perspective and to build trust but also, in some way to validate my own feelings around that phrase. It was very frustrating to me to not be able to work to identify EIA because I felt so strongly that it was at the core cohesion and accountability work that my research indicated was needed at OPP. Subconsciously, I think I wanted my team to get stuck on the EIA concept as well and in the process I was actually sabotaging my own project. We did eventually move past the mission and although the discussions around mission took away time from the CCR work, they did provide a great backdrop to practicing the communication skills. The topics we considered as we discussed EIAs including social services support systems, inequity, race, bias and even what it just means to be an adult, were substantive allowing us the opportunity get to know each other and build trust and understanding.

I was focused on understanding how the team performed their leadership skills in the meeting and in their work with colleagues specifically around the type of “high risk” conversations mentioned above and my evidence indicates that we did have success here. I was prepared to address and work through challenges we had around these topics and conversations. More recently however, I was made aware of a situation I did not anticipate. To simplify the situation: instead of a FIT member bringing to my attention
that he/she felt uncomfortable about the way I approached a conversation, this FIT member told her supervisor, who then told a member of the executive team. This shows me that I had not developed a trusting relationship with this FIT member. At the time of this writing, I have not further addressed the situation at the request of the executive team member for internal political reasons. I do feel that this situation is an excellent opportunity to readdress some of the leadership communication skills we were learning and practicing in the FIT team. I would like to sit down with all parties involved and have a discussion using these skills. I am considering how cultural norms, gender and race may have played a role in this situation but without that conversation, I cannot know for sure. I do hope I have an opportunity to see this through as it is a growth opportunity for the organization (this type of situation happens quite a bit and is not discussed as I learned in my research) and for my own leadership - a difficult conversation.

Once we moved past the EIA discussions, I utilized a design thinking approach to try and move forward with the CCR work.

The FIT spent a good amount of time empathizing and defining and this was necessary because of a lack of clarity. Empathizing focused on the challenges and successes each team member saw in their work and with their youth. There was also
empathy in discussions of systems, culture, bias, and other conditions of the work. We did not get to define the CRR because we worked on defining the mission as stated above. Ideation came at the end when we identified priorities for CCR which was one of the objectives in the theory of change. The prototyping and testing did not fit in to our timeline. The financial literacy program that was being rolled out across the organization is an example of what I had envisioned as prototyping. It was a competency that would help youth become EIA and was being developed collaboratively across programs in an attempt to reach youth enrolled in all programs.

The second consideration for the lack of realization of this program is that the scope of this project was inappropriate for the time allotment and authority level of the team. We often did not reach the CCR content objectives that were laid out in the meeting agendas and the team came together about every two weeks. The project did not begin until October 11th which left us a working time of 3.5 months. Late in the fall the executive team decided to add several extra paid days off to all the staff to compensate for a yearly pay increase and we lost some additional working time. Also, the TOC work began in January and that was not originally work I had anticipated. Looking back, I should have reflected on the progress of the team more after each of our meetings and either added more time to the meeting schedule or considered making adjustments to the project. For example; we could have moved from choosing several priorities asked to partner with the financial literacy team and really gone deep. I could have also worked with the team to assign working groups that each researched one of the identified priorities.
The team members were made up of direct service staff and in the hierarchy of the organizational chart did not have much official authority. There is one team member from schools that was in a higher level of official authority but other than this individual, I am uncertain how much legitimacy was given to the team members to really work in their departments on this project. There were a few occasions when team members were unable to attend a team meeting because their director asked to attend to another meeting or task.

From another perspective, there was not much evidence that I as the resident was given official authority to move this project. I addressed this with Mr. Rivera in November and Ms. Rey in January; this was late in the residency. I made assumptions that because Ms. Rey was authorizing me to do the work, that the work would also be considered as important to the organization. In October through the time of this writing, FIT work was referenced intermittently but specific data or reports (on CCR) were not utilized or asked for. When I did provide updates on the work, the information was noted but I didn’t receive additional questioning or pushback. I was given the authority to engage in the project but did not have a point of connection with anyone on the executive team to specific to this project. My experience was somewhat that of a consultant rather than a team member in the CCR work. There was a lack of interest in the CCR work.

A significant barrier to my success was a blind spot I had with the organization. The directors of the programs hold both official authority but some also a great deal of unofficial authority in different contexts. Some factors in this unofficial authority include the longevity with the organization, previous positions held in the organization and internal political alliances. Although I met with the directors both individually and in
their group meetings, my interaction was either from a learning stance or a report out
stance. I was not engaged in work with them and this may have limited my work; I did
not seek authority from the directors who hold a good deal of power within the agency. I
made assumptions that (1.) because I was brought on and authorized to do this work by
the CEO and (2.) because the COO was my supervisor of record, that the directors would
value and support the work that I was trying to do with the team. I anticipated a stronger
engagement in the work in the way of asking questions, seeking me out if opportunities
arouse, and discussions around the work. In looking through my notes, no questions were
asked of me about the work after my report outs. I often asked the directors to work with
me so that the CCR work integrated with their work as a directors’ group and also
individually in their departments; none of the director’s engaged with me on this. In some
way “strategic project” was just that. It was seen as a project that happened outside of the
rest of the work. I don’t have data as to the reasons for this but I am considering how I
might have branded or structured my work differently so that it was more integrated. I am
also considering how I might have enlisted the help of Ms. Rey and Mr. Rivera earlier
with this challenge. I wonder how previous experience with consultants work influenced
the directors’ perception of my work although I did make a point of communicating the
difference many times and in different ways. After receiving feedback from Ms. Rey and
talking through this wondering with other staff, I am wondering if in fact I operated as a
consultant and how I could have entered the work differently to avoid this. Also, not
having had a resident previously, perhaps I did not provide enough context to the staff or
to Ms. Rey to understand the difference.
I am unclear what the role of race, culture, and gender play into my residency work. My previous professional roles were in organizations predominately staffed with white women and men; OPP is an organization primarily staffed with predominately women and men of color. What were the expectations that staff had of me, as a white woman from Harvard, who reported to their new Latina CEO? This is a conversation I could have had with the FIT, the directors’ and the executive team but I did not think to do so.

I considered my experience with the FIT in relation to Moore’s Strategic Triangle (Moore, 2013, p. 103). Moore suggests that for an initiative to work, all three aspects of the Strategic Triangle must be aligned.

In the case of the CCR work of the strategic project, the authorizing environment/legitimacy and support did not exist to the extent needed to create value and drive performance. I considered that the operational capacity was also not sufficient to drive value or performance. The operational capacity in this case referred to the lack of clarity around the mission; until the organization addressed that challenge, the CCR work could not follow.
There is evidence supporting my analysis of the CCR work. At the time of this writing, 4 TOC change sessions had occurred. Both the initial outline of the work, process, and findings of the first sessions strongly mirrored my concerns with lack of definition and clarity around the mission (Rey, CEO, Our Piece of the Pie, 2018). This TOC work was authorized formally by the Board, CEO, and executive team; directors and direct service staff have been expected to participate in these sessions. One of the initial areas of work for the TOC sessions was to reexamine the mission statement. The new mission statement draft decided upon was, “OPP empowers youth to acquire the key competencies needed to overcome barriers and succeed in education and employment.” The process of identifying competencies aligned with this mission was similar to the approach that the FIT team undertook and resulted in similar outcomes. For example, the TOC sessions produced youth competencies including: “habits of success” (including financial literacy & life skills), career mindset/sustainable employment, importance of continuous education, awareness of community resources, and more (Cirillo, 2019, p. 1).

The second area of analysis for my project related to helping the FIT members develop leadership skills around communication. My theory of change referenced this as: “learns new communication strategies based in adult development theory and practices those strategies through tool develops their personal leadership in the areas of communication skills, then they can work within and across programs to identify the current status of those competencies across the agency and will be effective in recommending an organization wide CCR framework aligned with helping youth become “economically independent adults.”
My work with leadership development was successful for a few reasons. The scope and scale was appropriate. My objective was not to completely shift OPPs organizational culture but was to provide some foundational tools to a small working group as a pilot and model for the organization. I worked directly with a small group of staff and was able to introduce very specific tools and provide opportunities for the team members to practice and provide feedback on their use of the tools. Referencing again, Moore’s Strategic Triangle, all three elements: authority, capacity, and value were present.

The leadership objective was given value by the CEO in several ways. She enthusiastically stressed the importance of leadership development across the agency not only for all staff but for staff to model to the youth we served. She directly referenced DDO in a variety of situations and for a variety of audiences both internal and external. Additionally, she utilized her understanding of DDOs in the development of her second year guiding framework, “OPP Strong” and aligned the work I was doing to her vision of the organizational culture. She also gave me formal and informal authority in this area often referencing, “the work Tami is doing with the FIT” (Executive Team, 2018). There was also value generated in this aspect of the strategic project because the staff that were investing in the strategies and tools were finding them useful as described in the survey data. As also indicated earlier, not all FIT members were embracing the leadership communication tools equally, but this type of staff development takes time and not all individuals are at the same starting place.

In a discussion with an executive team member I was told my thinking influenced the shift in culture, “You’ve come in asking questions and have provided a space to have
those kinds of conversations; you’ve introduced a new way of thinking here” (Kakley, 2019). Also, during the individual FIT team debriefs we discussed how their newly developed leadership skills and approaches would be useful in the TOC work that the agency had undertaken. In a recent debrief with Ms. Rey, she explained that the FIT members were not the only benefactors to the leadership development I was bringing to OPP. She stated that I pushed the executive team, TOC of change team, and herself by the way I started conversations to new ways of thinking – providing different perspectives from different lenses.

**Implications for Site**

This two-fold strategic project had several areas of learning for OPP. The first area of learning was evident in the work that the organization undertook through its Theory of Change sessions. In the technical aspect of this work, the organization needed to be realigned around a more relevant mission statement that reflected updated consideration of the population and communities it served as well as changes in the sectors of education, workforce and non-profit funding. My research and strategic project work supported this organizational wide endeavor. It will be important for OPP to be structured both technically and adaptively to continue the energy and momentum around this work. OPP should focus on maintaining the understanding that the best work for youth will be done only if the organization continues to develop a culture of shared learning and collaboration.

As Ms. Rey and I discussed, this will require capacity building in staff and other resources as well as relationship building with funders and partner organizations to help
shift the conversation from what the funder can offer to OPP but rather to what OPP needs from the funder. The process by which the organization has engaged this full-scale TOC work is also a relevant learning to the organization. The TOC work was undertaken during a time of organizational culture shift for OPP. The TOC work provided a backdrop for testing whether a larger portion of the staff was also ready for the work. Staff at all levels were asked to participate in this TOC work which is a shift in the approach from previous executive leadership which was more pacesetting or commanding. The strategic project results related to the area of leadership development indicate that the staff is ready, willing, and able to continue to engage in this work. OPP should consider the following recommendations as it continues to develop its culture.

- The work of my strategic project focused on the leadership development of a small, pilot group of direct service staff and all staff should be exposed to concepts of adult development and offered communication tools and strategies in support of growing their leadership and helping the organization become deliberately developmental.

- A leadership development plan should be offered to all levels of staff on a continuous basis- not as professional development sessions but as part of individual learning plans.

- Ms. Rey should continue to deepen her understanding about the concept of becoming a Deliberately Developmental Organization (in collaboration with staff) and evaluate the readiness of the organization to undertake this significant organizational culture work.
• If OPP commits to becoming a Deliberately Developmental Organization they should engage the support of a consultant to help them develop a strategy and invest in a full-time staff member dedicated to growing and maintaining the supports around this culture development.

• OPP should create intentional leadership development opportunities for the youth it serves (scaffolded for developmental appropriateness).

With the appropriate investments, OPP will begin to realize the impact that staff leadership development, grounded in adult development theory, will have on their success and the success of their youth.

In addition to the recommendations above, my significant research on other areas of the organization suggest that OPP should take the opportunity to address policy around opportunity youth outcomes. As identified in the FIT and other research, opportunity youth do not find success in traditional environments but are often assessed in using traditional assessments; this is a major cause of discord between Schools and the HPS contract as well as other funder relationships. The expectations are often that opportunity youth achieve the results in a similar time frame to non-opportunity youth without the consideration that these youth have faced and continue to face significant barriers and are often behind in many skills sets while excelling at others. As OPP continues to improve its clarity around competencies and outcomes and as it continues to improve its data and metrics for accountability, it should use it expertise to advocate for fair and appropriate measurements of the success for opportunity youth.
Additionally, OPP should consider how their experience engaging all staff as part of organizational TOC work can be a model for other youth development organizations. Too often youth development organizational strategy is created from a top-down framework which leaves out the direct service staff who understands the needs of the youth most intimately. Using strategies aligned with becoming a DDO is a model that incorporates voice at all levels so decisions can be made from multiple perspectives.

**Implications for Sector**

The strategic project has substantial learnings for the youth development sector relating to organizational performance and in recommendations to funders.

Organizational performance for youth development agencies must improve by developing robust systems of accountability through programmatic structure and process of evaluation and improvement. Mission driven organizations in this sector must align their missions with a framework of competencies, indicators, and programs that encourage mastery rather than completion. Particularly for youth development organizations that work with opportunity youth, it is crucial to recognize youth from an asset based approach as opposed to a deficit based approach.

This strategic project also highlighted the significant discord between philanthropic and government funding methodology to the actual needs of youth development organizations. Too often funding sources require unreasonable mandates on population served, program components and do not include enough support for operational and “gap” needs. Funders should consider aligning their
mandates with organizational needs. The current methodology produces gaps in services that can result in less than ideal outcomes for youth and low organizational performance. Additionally, current funding methodology discourages organizational coherence and innovation as it creates competition over resources and leaves organizations vulnerable to developing “silo cultures” and loss of integrity in the mission in order to receive funding. This strategic project also provides a beginning model for illustrating how engaging with TOC/Strategy work in step with working toward DDO (using adult development tools to improve leadership development) can improve organizational communication and encourage a culture of collaboration for staff (and the youth they serve.)
Conclusion

Our Piece of the Pie (OPP) is a long standing community serving organization in Harford that is dedicated to helping opportunity youth in greater Hartford prepare for success in education and employment. OPP and many of its stakeholders consider the youth development specialist model, which pairs a staff member with an opportunity youth, to be one of the strongest and unique tenets of its approach to working with youth. OPP provides skill and knowledge development to youth in the areas of education, workforce, and social emotional learning and is divided into 2 areas: Schools and Community.

OPP brought on a new CEO, Enid M. Rey Esq. in August 2017 after long standing CEO, Bob Rath retired. Ms. Rey entered the organization and shortly after faced significant challenges including the closing of a charter school overseen by OPP resulting in significant financial and operational challenges to the organization. As a first time CEO, these were not challenges she had faced in her previous roles and she was still very new in her position and still in her entry learning period when this significant challenges arose.

Ms. Rey and I discussed options for my residency work, based on my skill set and interest and perceived organizational needs at the time, would be related to the educational arm of OPP or possibly some organizational culture work as her early learning had indicated lack of collaboration and consistency across programmatic departments. I began my research and learning around the educational needs of the organization and how those needs interacted with OPP’s other programmatic areas, paying particular attention to OPP’s culture.
I began my learning through internal and external focus groups and interviews. I also reviewed internal documents and media such as consultant reports, staff surveys, meeting minutes, and digital presence. What stood out to me most significantly during my research was as, Ms. Rey had suspected, OPP lacked a culture of shared learning and collaboration. Additionally, there was lack of clarity around the mission, specifically as to what an “economically independent adult” (EIA) was and OPP lacked consistently articulated youth competencies in support of helping youth become EIA.

OPP restructured its programmatic departments over the last several years in response to funding sources; my research indicates that this restructuring along with a longstanding leadership culture of a hierarchical, top down decision-making contributed to the current culture challenges. The departmental structure also inhibited equitable youth participation as most programming was isolated by departments and minimally open and promoted to youth across the agency. This environment made shared learning and collaboration difficult; programmatic decision making was driven primarily by the previous CEO with support of the COO. These challenges are not uncommon in non-profit organizations.

As OPP became more siloed internally and with the continued financial concerns, the organization became more dependent on financial opportunities as opposed to being driven by mission and competencies. This challenge is also not uncommon in non-profits and can contribute to mission creep as programmatic offerings no longer directly support the intended mission of the organization. The lack of clarity around the mission and lack of organization wide, consistent competencies only added to the challenge of identifying competencies.
Ms. Rey and I decided that I would lead a strategic project that would involve identifying college and career readiness (CCR) competencies at OPP and also help individual team members develop their leadership. This CCR work would be in support of OPP achieving its mission of helping youth become “economically independent adults.” I still felt strongly that achieving organizational clarity in the mission was the work that should be undertaken before CCR competencies could be articulated. Ms. Rey explained that she was still working on building capacity around policies, protocol, and procedures of the organization and until that work was further along, did not agree that the organization was ready for mission work. We decided on the CCR framework because it would identify youth competencies in support of college and career readiness and be valuable across the agency should Schools be discontinued or reconfigured.

I designed the project around leading a team of direct service staff from across programmatic departments. Ms. Rey and I chose the direct service staff as a subgroup that would benefit from the leadership development as well as providing a voice closest to the youth; this turned out to be problematic based on an analysis of the role of authority in the organization. The team’s work would be two-fold; we would identify CCR competencies that would support the organization’s mission and the team members would learn and practice communication skills to improve their personal leadership capacity in the context of engaging in the CCR work both within the team and across programs in the agency.

The team was assembled primarily based on recommendations by the program directors who were asked to identify someone in their area that was ready for leadership work, had the capacity, and had the interest in this work; each program recommended an
individual. I suggested an additional individual whose title was “post-secondary coordinator” and Mr. Rivera recommended that the director of youth development services in Schools was also included. We began with a diverse group of 6 individuals (diverse by longevity in the organization, race, and gender); later in the project two other individuals joined. A member of the data team joined enthusiastically and was recommended by his supervisor and an additional member was added from the Workforce area at the recommendation of the other Workforce team member. The team met a total of 6 times at the time of this writing.

I created a work plan that began with starting to build trust in the group with some introductions, norm setting, and initial team discussions around the mission statement and the CCR work happening in each department. I also planned to introduce several communication tools grounded in adult development theory as the leadership development component.

The team’s work around CCR competencies did not progress as far as I had hoped. The team spent a good deal of time trying to clarify the mission. The outcome as stated in the mission was that OPP would help youth become “economically independent adults” and the team struggled to identify what this phrase meant. Our struggle occurred because there was no organizational clarity around the mission and because in my own leadership, I was pushing for validation on this topic as I felt so strongly about it. I had several conversations with the executive team regarding the need to clarify the mission and then the competencies that supported that mission however, Ms. Rey explained to me that the organization wasn’t ready for that work at the time.
After a few meetings focusing on the mission, we did move forward in order to move the work. I cross walked research on what a youth needed to become “economically independent” and what a youth needed to become “college and career ready” and then explained this to the team and we focused our efforts in the overlapping space. The team defined 3 areas of focus: self, interaction with others, and knowledge. Within these areas the team identified 3 priorities to focus on organization wide:

- supporting youth in developing self-management, particularly focusing on being dependable;
- supporting youth in communication with others, particularly focusing on helping them develop the skills to access and navigate post-secondary systems; and
- supporting youth in gaining knowledge, particularly related to financial literacy.

The priorities were determined not only from the research I provided but also from research and experience the team engaged with. The concept of being dependable was an area the team identified as being a challenge point for youth whether it was in reporting to internships or showing up to class consistently and was a trait that was highlighted in the research, particularly with employers. Many of the difficult conversations we had around the way systems worked led us to the second priority. Youth needed to be skilled at communicating with others, particularly when it came to navigating systems of employment (how do you discuss a raise with a supervisor?) and education (how do you discuss your career interests with an advisor?). We determined that navigating systems required effective communication skills with others for this second priority. The third priority identified financial literacy as a knowledge base. Financial literacy in relation to personal taxes, student loans, being bankable, and understanding credit are crucial to being “economically independent” however defined.
and are important to being successful in career and education. A further benefit to this priority was that the organization was piloting such a program and attempting to scale it across all organizational programs.

The team did not progress further than making these recommendations to the executive staff. The mission definition, change in direction of strategy work (to be explained later), and lack of time contributed to the lack of follow through identifying these competencies throughout the organization and creating a framework to implement them.

In terms of the communication skills development in support of personal leadership we did find more success. I was able to introduce several tools and strategies for improved communication including deep listening, recognizing bias, and more. Through interaction in the meetings, individual one-one meetings with staff, and team surveys, the evidence suggests that the team did learn and practice many of the tools and strategies. This evidence includes my direct observation, casual feedback I received from various members of the executive team, one-one feedback from the team members, and data from a survey the team members filled out anonymously. However, I was also made aware just recently of a situation in which one of my team members had a concern with my work and rather than bringing it directly to me, he told a supervisor, who then told another supervisor; this shows me that although there was evidence that my team members were developing in the context of the meetings and direct work, perhaps the day-to-day aspects of leadership was something I should have focused on as well.

Additionally, I had conversations with Ms. Rey and other members of the executive team during which I understood that my perspective (as an outsider) on the work of the
organization was influencing and highlighting some of the areas for leadership
development that were more difficult to see from an internal perspective. At the time of
this writing, I was not able to solicit feedback from the team members’ directors due to
some competing priorities as the organization revisited its theory of change.

Earlier, I mentioned a shift in the organization’s direction with strategy work. I
found out in December that Ms. Rey and Mr. Rivera had identified a funder and a
consultant to assist OPP with refreshing the organization’s Theory of Change. The
Theory of change (TOC) work began in January, was led by a consultant that had worked
with OPP previously and involved over 20 members of the staff over the course of 5
meetings. As I came to understand the scope and detail of the work, I realized my CCR
project was duplicative. I assisted Ms. Rey in developing agendas, facilitating 2 meetings
and the youth focus group, and debriefing the work. I also had a discussion with the
executive team and explained that my FIT members were well prepared to engage in this
TOC work. Although TOC meetings began with the executive staff and directors, there
were plans to bring in direct service staff. I strongly suggested that the FIT members be
that direct staff. I also met with the directors to discuss this idea. 4 of the FIT members
were invited to join the TOC work and were able to contribute using their leadership
communication skills and the knowledge about CCR they had learned by being part of
the team. Ultimately, this TOC work clarified the mission statement to: “OPP empowers
youth to acquire the key competencies needed to overcome barriers and succeed in
education and employment.” The competencies to support this new mission were
developed and ranked by staff, board members, and a youth focus group; at the time of
this writing they aligned with the FIT work and were:
Just prior to the start of the TOC work, I suspended the work of the FIT and engaged with the executive team, directors’ team, and the FIT members to explore how the FIT team could continue contributing to the work of the organization given the new TOC work. All agreed that the work being done by the FIT team in terms of CCR was aligned with, if not directly duplicative with, the TOC work. The other context of leadership development was still a void that needed to be filled and will be addressed further in this writing.

The TOC work informed the directors decision to fold 2 of the FIT members (among 3 other direct service staff) were into a committee that reported to the directors’ team as a “voice from the front line” (Hooker, Director, OPP Work 2 Learn, 2018) and provided opportunities to provide input on youth needs and work cross collaboratively in support of the new mission and its competencies. I am working with Ms. Rey to explore opportunities for the other FIT members to continue to provide contribute to the organization’s TOC and culture work as a part of other groups or their own group.

I discussed the leadership aspect with the executive team, directors’ team, and the FIT members as well. The FIT members did find value in the work and wanted to continue to work on their leadership but suggested it didn’t have to be in a team; the director’s didn’t have much input on this aspect of the team. The bigger picture as I discussed with the executive team was how to develop a holistic professional
development plan for the organization. This would be a plan that would continue to support foundational cultural elements and skills sets in support of building a foundation that would support future DDO work. The work I engaged with in the FIT was not directly DDO work; it was rather an attempt at building leadership communication skills that would be part of a needed foundation if the organization looks to support DDO work in the future. In order to truly build a DDO within OPP the organization must first identify a major organizational challenge that would be solved by becoming a DDO. In a DDO everyone is learning how to develop themselves and each other. This approach may assist OPP in being more effective in the work that they do but does OPP consider itself as needed to improve in this way? It was difficult to know at the start of my work due to lack of clarity around mission and competencies as well as a lack of measurable data in relation to outcomes. Secondly, the organizational leaders must develop a thorough understand of what it means to be a DDO and realize that their leadership and modeling of DDO principles will be crucial to the organizational shift. They must educate the staff on this concept and solicit their feedback to determine interest and buy in. If these three areas produce results that indicate OPP would benefit from a DDO culture, then a baseline on the current culture must be understood and a plan put in place to ready the organization for DDO work. Outside of this capstone and residency project, I will be creating recommendations on how OPP can support this vision.

As a leader in this residency, one of the biggest challenges I found in my work with OPP was understanding and negotiating the role of authority, both formal and informal. I made assumptions around the CEO and executive team members as authorizers of my work, but I neglected to consider the role of the director’s authority,
both individually and as an authorizing group. The directors hold a good deal of the power of the organization as developers of the programs, supervisors of the direct service staff, and as those that have the most direct understanding of the data. Looking back, I recognize that although I spoke with the directors individually and as a group several times, I did not have their engagement; they were not authorizing my CCR work. I theorize that my work was still seen as a consultant despite my attempts to combat that perspective and as a consultant, I remained an outsider to OPP.

I did spend a good deal of time learning about the organization but had missed a few key points. The first was that there were structural changes during the 2014 strategy work that flattened the organizational chart leaving one director who had previously held a higher, official level of authority on the same level as the other directors. I also failed to consider how the extreme longevity of employment of many of the staff affected the informal relationships and systems of authority. This was not something I could have learned in my early days at OPP but needed to be revisited as I reflected on my ongoing work. In my future leadership roles I will address these areas in my early learning and focus on time for reflection as a crucial part of continued learning.
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