Doing Together What We Cannot Do Alone: Designing a Network to Build a Field

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Doing Together What We Cannot Do Alone: 
Designing a Network to Build a Field

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

Submitted by
Heather K. Johnson

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

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Dedication

To all of my teachers, especially my students.
Acknowledgements

This section could be as long as my capstone and will never adequately capture the power or scope of the community that has sustained me. Alas, thanks to:

My capstone committee—Amy, Kathy, and Mandy—for being my champions from start to finish and beyond. Being surrounded by brilliant, strong, kind women has been such a gift. You are models of the educator, leader, and human toward which I strive.

The PtoP team—Adelina, Amy, Ankita, Bob, Charlotte, Derek, Gregg, Jonathan, Julia, Kim, Kyle, Leah, Nancy, Sandra, Sarah, Sheila, Tobie, and all of the PtoP-adjacent folks—for the warm welcome into your family of passionate, thoughtful leaders. You have consistently helped me think deeper and laugh harder.

C7—all of you—for asking the hard questions and demanding more of yourselves, of our world, and of me.

Team A\CE—Christine, Jess, Kelvin, and Tony—for showing me new possibilities for leading and learning together. Individually and collectively, you have fundamentally shaped my leadership in ways I am only beginning to recognize.

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My Providence family—all of you—for the wisdom, friendship, and joy along this journey.

My parents—by blood and by marriage—for the constant and unconditional support and love. My mother—Carol—deserves a special shout-out for a lifetime of being the most generous and fun human I will ever know, and also for the surprise chip deliveries, morning runs, and constant cheerleading.

My partner in all things—Meg—for loving me and sustaining me through it all. Your patience, encouragement, and love have been nothing short of everything.
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Abstract

The Pathways to Prosperity (PtoP) Network at JFF has a bold vision: to reimagine how young people are prepared for the future of work in the United States. Launched in 2012, the PtoP Network is leading a national effort to improve education, workforce, and economic outcomes by building career pathways systems that prepare all young people for economically sustainable futures. This capstone examines my work to design and implement a strategy to engage high-level leaders ("the leads") from different sectors and roles across the PtoP Network in intentional and deliberate activities to increase their impact, build their affinity for and connection to the Network, and advance the career pathways field. I examine design considerations for leaders of networks and elevate tensions inherent in the complex work of cross-sector collaboration. My analysis focuses on themes of delivering value and navigating uncertainty in the network design process, with implications for my leadership in the midst of ambiguity, for the future of the PtoP Network, and for collaboration across the education sector. Overall, the findings offer insights into the promise of networks to support field-building through careful design.
**Introduction**

In the fall of 2017, I took a course called Designing for Learning by Creating.\(^1\) After a semester of immersion at the intersection of designing, learning, and creating, I reflected on the implications for my own leadership: “I aspire to be a designer of learning and an orchestrator of creativity, creating conditions that empower all as designers, learners, and creators.” I have always viewed my work as an educator and leader as design work. Specifically, I see myself as a designer of conditions—for learning, for trust, and for impact. The course challenged me to consider my identity as a designer in the context of systems leadership. What does it mean, as a systems leader, to create spaces that support tinkering, creativity, and innovation? This capstone is an exploration of such aspirations and questions in practice. Specifically, it examines network design—the process, the conditions, and the leadership—within the context of the Pathways to Prosperity (PtoP, pronounced “P to P”) team at JFF, a national nonprofit that drives change in the American workforce and education systems to create access to economic advancement for all.

PtoP has its origins in a report. In February 2011, the Pathways to Prosperity Project at the Harvard Graduate School of Education (HGSE) released *Pathways to Prosperity: Meeting the Challenge of Preparing Young Americans for the 21st Century*. The report highlighted what the authors characterized as a “clearly badly broken” education system with implications for

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\(^1\) The course (T-550) was designed and taught by Karen Brennan at the Harvard Graduate School of Education. It focuses on constructionism and is based on a course taught by Mitch Resnick at the MIT Media Lab.
both students and the economy (Symonds, Schwartz, & Ferguson, 2011, p. 23). It pointed to a more demanding labor market, widening skills and opportunity gaps, and low levels of educational achievement and attainment as symptoms of a system that is failing to prepare many students for prosperous lives. The report’s authors outlined an urgent vision to position preparation for college and preparation for career as complementary and simultaneous options rather than mutually exclusive ones (Hoffman & Schwartz, 2017; Symonds et al., 2011).

Pathways to Prosperity generated a high level of attention and interest for creating the kinds of comprehensive, system-level career pathways described in the report (Loyd, 2013). In response to the enthusiasm, Pathways co-author Bob Schwartz and Nancy Hoffman partnered with JFF and a cohort of six states to launch the Pathways to Prosperity Network (PtoP Network) “to help member states and regions design and build career pathways systems” (Hoffman & Schwartz, 2017, p. 6). Since its launch in 2012, the PtoP Network has engaged 23 members, listed in Appendix A.

Grounded in the challenges and opportunities outlined in the Pathways to Prosperity report, the PtoP Network is “boldly reimagining how U.S. education and workforce systems meet state and regional talent needs and prepare young people for careers” (JFF, 2018). It takes an ecosystemic approach to career pathways design with a focus on alignment across secondary, postsecondary, and workforce systems to equip all young people with the skills and experience that position them for economically sustainable futures. Fee-based membership, with an initial commitment of at least three years at the state or regional level,
provides an individualized scope of work from JFF that includes ongoing consultation and technical assistance aligned to the unique vision, goals, and needs of the member. (See Appendix B for the current PtoP menu of services.) Membership also includes access to curated Network resources and opportunities for peer learning across members. Most notably, every fall and spring, each member state or region assembles a team of approximately ten cross-sector stakeholders to engage in learning, sharing, and strategic planning at a national PtoP Network Institute. The original PtoP logic model stated: “Network will have high visibility nationally, and will serve as a model for interstate collaboration in education reform and cross-sectoral partnerships” (Loyd, 2013, p. 46). In other words, the PtoP vision has always extended beyond the work happening in individual states and regions to include collaboration and scale. Today, PtoP similarly posits itself as “a movement, a national network, and a catalyst” (JFF, 2018), highlighting its own leadership in the career pathways field as well as the leadership of its members.

Today, in addition to the membership-related work described above, the PtoP portfolio includes a range of contracts and grants that support the development of pathways systems outside of Network membership. As PtoP has grown and evolved over the seven years since its launch, the team has desired to move toward a more proactive, strategic approach to achieving impact. In recent years, such recalibration considerations have been dubbed Pathways 2.0 (Deuser, 2018). A key question emerges: How can PtoP increase the scale and impact of its career pathways work? Within this larger problem of practice, a
more focused strategic question centers the role of the PtoP Network: *How can PtoP leverage its network structure to move the work and the field forward?* This capstone tackles these questions. Specifically, it examines my work with the PtoP team at JFF to design and implement a strategy to engage high-level leaders from across the PtoP Network (often referred to as “the leads”) in intentional and deliberate activities to increase their impact, build their affinity for and connection to the Network, and advance the career pathways field more broadly.

My strategic project was the design of a subnetwork of leads within the PtoP Network. The leads are the individuals in each Network member state or region who are leaders and champions of pathways work and serve as the primary conduit for PtoP collaboration and connection. They hold a variety of different positions and roles within their contexts and sit in multiple types of agencies and organizations, creating a unique and diverse set of perspectives. PtoP has made efforts to convene this group in the past. In fact, one of the first all-Network convenings included a pre-meeting specifically for the leads and leads meetings have been a fairly regular, albeit inconsistent, part of the twice-annual PtoP Network Institutes (Pathways to Prosperity, 2018). However, PtoP has not established a clear and consistent structure to mobilize energy and action toward particular goals or outcomes relative to the leads. My task was to create the conditions necessary to build the capacity of this group to lead and learn together. I examined the community of Network member leads as a container through which PtoP can innovate around convening for impact. As
PtoP positions itself as an expert in convening and connecting system-level leaders in service of advancing and strengthening the career pathways field, the work with leads is a dual opportunity to do that work and to extract lessons about how to do it better.

This capstone is a documentation of my design process. For the purposes of focus and depth, it will focus primarily on the leads subnetwork, although the work has significant implications for the PtoP Network and an overall PtoP strategy. I first ground the work in a review of relevant literature, drawing from sources that explore various components of cross-sector collaboration and network design. That knowledge informs a theory of action for how I, as a member of the PtoP team, drive a leads strategy. I then present the how, what, and why of my leadership actions, including an analysis that examines the complex roles of value and uncertainty in network design. I close with implications of the evidence and analysis for my leadership, for PtoP and JFF, and for the larger education sector. Throughout, I emphasize my design decisions as a leader.
My strategic project lived at the intersection of field building, network design, and leadership. Therefore, I review literature related to the three, with a specific focus on the relationships between and across them. This review of knowledge for action (RKA) is rooted in a three-part sequence, illustrated in Figure 1: fields matter in driving systems, networks matter in building fields, and leadership matters in designing networks. It examines design considerations for leaders of networks and elevates tensions inherent in the complex work of cross-sector collaboration through networks. The section concludes with my theory of action, which is informed by the RKA and offers a frame for subsequent analysis of my efforts.

Figure 1. Relationship between leadership, networks, fields, and systems.
Fields to Drive System-Level Change

At the heart of the Pathways to Prosperity initiative is an unofficial motto: systems, not programs. In other words, there is a commitment to moving beyond successful pockets of innovation toward building a career pathways field. The work is focused on ensuring that all students are able to make informed choices about their futures and have access to careers that lead to economic success and advancement. In 2009, the Bridgespan Group published The Strong Field Framework, a comprehensive approach to building and assessing strong fields as a strategy to drive social change. The report defined field building as “coordinating the efforts of multiple organizations and individuals around a common goal and creating the conditions necessary for them to succeed” (p. 3). When that common goal is oriented toward a pressing social issue, the field building approach facilitates a focused change effort. The Strong Field Framework outlines five key components of a strong, cohesive field, which will serve as my working definition: (1) shared identity, (2) standards of practice, (3) knowledge base, (4) leadership and grassroots support, and (5) funding and policy support. The complete framework, including a summary of each component, is included in Appendix C. Field building is increasingly being utilized by funders as a powerful strategy for system-level change (Bernholz, Seale, & Wang, 2009). For example, Blue Shield of California Foundation launched the Strong Field Project (SFP) in 2010 “to lead a stronger movement to prevent and end domestic violence” (Cao Yu, Henderson-Frakes, & Corral Peña, 2016, p. 9). As they shifted from a programmatic focus toward “a field-level lens,” they
strengthened individual leaders and organizations, but also collaborative networks, the knowledge base, and momentum for field-building work in the domestic violence field (Cao Yu, et al., 2016).

Lucy Bernholz (2009), a philanthropy scholar and strategist, described field building as a transition from “a phase of entrepreneurial fragmentation” to “organized markets” (para. 2). My strategic project specifically focused on the status and evolution of such a transition within the career pathways field. The concept of career pathways is not new; current strategies and approaches, at JFF and more generally, have important foundations in the successes and challenges of over 30 years of career-related education in the United States. For example, the School-to-Work program in the mid-1990s focused on integration of academic and technical education, work-based learning, secondary-postsecondary alignment, and preparation for high-skill and high-wage jobs (U.S. Department of Education, 2015). Many of these strategies have been consistent elements of career-related and training programs and continue to drive today’s career pathways. Over time, however, the language, priorities, and public and political support of the work have shifted, with implications for the demands of field building. Hoffman and Schwartz (2017), co-founders of the PtoP Network, recently reflected on the career pathways field, five years after the launch of the Network. Using the Strong Field Framework as a guide, they identified shared identity and leadership as strengths and argued that other components of the framework—grassroots support, standards of practice, and knowledge base—are nascent or missing. In other words, there is an emerging and visible field with a
growing level of leadership and some clear areas for growth and action. The goal, then, is to further develop and strengthen it.

**Networks to Build Fields**

Bernholz et al. (2009) asserted, “One of the more important features of a field’s future viability is the strength and reach of its networks” (p. 12). In their most basic form, networks can be defined as “people connected by relationships” (Scearce, 2011, p. 6). Network Impact and the Center for Evaluation Innovation (2014) offered a more comprehensive definition of a network that captures several of its core features: “A network is a decentralized member-driven platform of relationships that evolves its capabilities and underlying structure of connectivity. Its success depends crucially on the degree to which it organizes connections among its members to produce unique, flexible capacities” (p. 4). I like this definition of a network for several reasons. First, the verbs—*evolve*, *organize*, and *produce*—signal an active platform of relationships rather than a passive one. Networks do. This definition also highlights the role of networks as important containers for collaborative work by focusing on *capabilities*, *structure*, and *capacities* across members. Further, the *flexible* nature of those capacities consistently shows up in research as a critical feature of networks (Henig, Riehl, Rebell, & Wolff, 2015; Network Impact & Center for Evaluation Innovation, 2014). Each of these components speak to what a network *is* and what a network *does*.

Overall, effective networks connect people and ideas to produce joint value over time in service of a defined objective. At the heart of such work is
**Level-C learning.** Douglas Engelbart, an engineer and pioneer of human-computer interaction, identified three levels of social learning:

- **Level-A learning** refers to knowledge that individuals can learn on their own, through practice and reflection;
- **Level-B learning** is generated through interactions across individuals within a particular institution; and
- **Level-C learning** occurs across institutions (Bryk, Gomez, Grunow, & LeMahieu, 2015).

Level-C learning is “an especially potent form of knowledge generated as ideas are elaborated, refined, and tested across many different contexts” (p. 143). Networks are well positioned to support such learning. They offer a promising structure for facilitating cross-sector, cross-context collaboration to tackle complex problems. Pugh and Prusak (2013) used the term *knowledge networks* to describe “collections of individuals and teams who come together across organizational, spatial and disciplinary boundaries to invent and share a body of knowledge” with a focus on “developing, distributing and applying knowledge” (p. 79). I use the following sections to examine the characteristics of “knowledge networks.” Specifically, how does one design and nurture them?

**Leadership to Design Networks**

Network Impact and Cause Communications (n.d.) developed a Network Health Scorecard to be used by the leaders and members of a network to diagnose its strengths and areas of growth. The complete tool (see Appendix D) has 22 statements organized into four categories: purpose, performance,
operations, and capacity. It serves as a useful framework to identify and audit many dimensions of network effectiveness across a range of contexts. But how are effective networks created? Effective networks must be intentionally designed to develop and sustain cross-sector collaboration, positioning network leader as designer (Pugh & Prusak, 2013). Writing about networked improvement communities, Bryk et al. (2015) highlighted the importance of thoughtful design across operational and affective dimensions similar to those captured by the Scorecard:

Lastly, we note that effective networks don’t just happen automatically. They are the result of conscious effort to engage membership, focus collective effort, make it possible (even easy) to participate in the work, recognize and validate the contributions of members, and see to it that all share in the benefits of participation (emotional as well as intellectual) (p. 158-159).

Deliberate and strategic design and facilitation matter for network effectiveness. Based on a review of these literatures and others about networks in particular and cross-sector collaboration more generally, I explore three important design considerations for network leaders: goals, structure, and mindsets.

**Goals.** Network effectiveness depends on the specific goals and purposes of a given network. Pugh and Prusak (2013) identified four distinct types of goals that drive knowledge networks. The four goals—coordination, learning/innovation, translation/local adaptation, and support of individual members—are summarized in Figure 2. Success would look different for each of
the goals, so it is important to be clear about which goal or goals are driving the network at a given time. Henig et al. (2015) explained, “Uncovering the tacit and explicit reasons behind decisions to collaborate might be helpful in understanding how different collaborations evolve, because initial conditions and reasons for collaboration often have consequences for the subsequent framing of joint action, the dynamics of power and conflict, choices about whether to continue collaborating, and more.” With a clear collaborative purpose, networks are more likely to evolve in a way that aligns to the goals.

![Figure 2](image_url)

*Figure 2. Four knowledge network goals. Adapted from Pugh and Prusak (2013).*

In evaluating network effectiveness, goals are conceived alongside a network’s desired impacts. Network Impact and the Center for Evaluation Innovation (2014) described a network’s “chain of impact,” which has three levels: impact on the individual, impact on the local environment, and impact on the broader environment. One level is not better than another, as each plays a distinct role in driving change. But, as with the goals, definitions of success are different for each level. For example, Cao Yu et al. (2016) shared lessons from a domestic violence field-building initiative in California. Among other goals, the project aimed to “create vibrant collaborative networks” (p. 7). The project anticipated that the networks would have an impact on individual members,
which would translate to impact on their individual organizations and contexts within the domestic violence field. However, the desired impact of the networks was to collectively build the field. They found that the domestic violence field “has become more diverse and made progress toward bringing in new leadership, nontraditional partners, and innovative ideas” and “has made progress toward developing a shared language and a shared vision” (Cao Yu et al., 2016, p. 13). If the impacts stopped at the level of the individual member, those networks would not have been considered effective because they did not realize broad impact. Effectiveness, then, follows a clear and ongoing understanding of why the network exists and what it hopes to accomplish.

**Structure.** In order to realize the goals and desired impacts of a given network, leaders must design structures that support them. Pugh and Prusak (2013) outlined eight design dimensions, summarized in Figure 3, to “help leaders thoughtfully design and manage knowledge networks” (p. 85). They classified the eight design dimensions into three categories: strategic, structural, and tactical. All three dimensions are necessary to drive network effectiveness, and the structural dimensions serve as an important mediator between the strategic and tactical ones.
<table>
<thead>
<tr>
<th>Dimension</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Strategic</strong></td>
<td></td>
</tr>
<tr>
<td>Leaders’ shared theory of change</td>
<td>Articulation of theories of change</td>
</tr>
<tr>
<td>Objectives/outcomes/purpose</td>
<td>Definition of purpose and target outcomes</td>
</tr>
<tr>
<td>Role of expertise and</td>
<td>Creation of safety for the expert to be vulnerable and the learner to speak of bold possibilities</td>
</tr>
<tr>
<td>experimental learning (a.k.a.</td>
<td></td>
</tr>
<tr>
<td>“the expert-learner duality”)</td>
<td></td>
</tr>
<tr>
<td>Inclusion and participation</td>
<td>Identification and active recruitment of ideal members</td>
</tr>
<tr>
<td><strong>Structural</strong></td>
<td></td>
</tr>
<tr>
<td>Operating model</td>
<td>Identification of roles, responsibilities, and decision processes needed for optimal network operations</td>
</tr>
<tr>
<td>Convening structures</td>
<td>Use of convenings to build cohesion, connection, collaboration, and engagement</td>
</tr>
<tr>
<td>Facilitation and social norm</td>
<td>Engagement of network members in ways that support positive interactions</td>
</tr>
<tr>
<td>development</td>
<td></td>
</tr>
<tr>
<td><strong>Tactical</strong></td>
<td></td>
</tr>
<tr>
<td>Measurement, feedback, and</td>
<td>Collection of evidence of success or failure, and creation of extrinsic and intrinsic incentives for members</td>
</tr>
<tr>
<td>incentives</td>
<td></td>
</tr>
</tbody>
</table>

*Figure 3.* Design dimensions of knowledge networks. Adapted from Pugh and Prusak (2013, p. 85-87).

The structural considerations have implications for roles at both organizational and individual levels. In other words, what is the role of the network convener and leader in structuring and supporting collaborative work? Two similar models that can offer insights into this question are the backbone organization as defined in collective impact literature and the network hub as defined in networked improvement communities. Backbone organizations are rooted in the premise that coordination of complex collaborative work requires dedicated time and resources. They exist separate from participating organizations to manage, coordinate, and facilitate collective impact work (Kania & Kramer, 2011). The network hub plays a similar role in networked improvement communities, focusing on "a set of supporting capacities, both to get started and
to keep going” (Bryk et al., 2015, p. 157). Core hub functions include training and coaching, analytics support, codification and dissemination, and coordination of ongoing connections across members. Network hubs can take a variety of different structures, including ones in which members share the hub functions (Bryk et al., 2015).

In both backbone and hub models, the roles are defined and clear. Also in both models, the roles are multifaceted, demanding simultaneous attention to logistics, relationships, politics, and more. Network structure entails a complex balancing act. Henig et al. (2015) identified three primary tensions involved in managing collaborations: efficiency versus inclusiveness, internal versus external legitimacy, and flexibility versus stability. Kania and Kramer (2011) highlighted similar negotiations, describing the ideal competencies of a backbone organization as “the ability to focus people’s attention and create a sense of urgency, the skill to apply pressure to stakeholders without overwhelming them, the competence to frame issues in a way that presents opportunities as well as difficulties, and the strength to mediate conflict among stakeholders” (The Five Conditions of Collective Success section, para. 17). Across the tensions, a thoughtful consideration of the right balance can drive a more effective network.

Mindsets. Finally, I examine the role of mindsets in the kinds of complex, cross-sector collaboration outlined above. I am simultaneously interested in the mindsets of leaders of a network and of leaders within a network, particularly for networks with system-level change as their goal.
Networks often demand a shift in mindset from traditional understandings of leadership and success (Wei-Skillern & Silver, 2013). In Catalyzing Networks for Social Change: A Funder’s Guide, Diana Scearce (2011) presented two ends of a “traditional mindset”-”network mindset” spectrum. The ends, captured in Figure 4, represent two ways of orienting to joint work. On the network mindset side, there is an emphasis on collective contributions, responsiveness, and shared processes. Such approaches and commitments require new skills for leaders who are accustomed to traditional mindsets that value autonomy, control, and clarity. Bryk et al. (2015) captured a level of uncertainty inherent in the shift: “Achieving successful change in complex work systems means recognizing that one cannot predict ahead of time all of the details that need to be worked through nor the unintended consequences that might also ensue” (p. 7).

<table>
<thead>
<tr>
<th>Traditional mindset</th>
<th>Network mindset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firmly controlled and planned</td>
<td>Loosely controlled and emergent</td>
</tr>
<tr>
<td>Strengthening individual efforts</td>
<td>Weaving connections and building networks</td>
</tr>
<tr>
<td>Procuring deliverables (e.g., programs)</td>
<td>Stimulating activity (e.g., platforms)</td>
</tr>
<tr>
<td>Proprietary information and learning</td>
<td>Open information and learning</td>
</tr>
<tr>
<td>Decision making concentrated</td>
<td>Decision making shared</td>
</tr>
<tr>
<td>Insight from individual, “expert” actors</td>
<td>Collective intelligence</td>
</tr>
<tr>
<td>Effectiveness linked to concrete outputs (e.g., a policy win, a measurable increase in community prosperity)</td>
<td>Effectiveness also linked to intangibles (e.g., trusting relationships, information flows)</td>
</tr>
</tbody>
</table>

Figure 4. Traditional versus network mindsets. Adapted from Scearce (2011, p. 13).

The skills and mindsets necessary for network success are, in many ways, “counterintuitive relative to common practice” (Wei-Skillern & Silver, p. 122). The work comes with real tensions, as the demands and interests of the network can
challenge or conflict with those of one’s own organization (Henig et al., 2015). Recognizing the complexity, Scearce (2011) did not call for a blind shift from a traditional mindset to a network one; instead, she presented network leadership as an “art” in “figuring out what’s appropriate for your situation and challenging yourself to share control and experiment with the network mindset end of the spectrum” (p. 13). Network design demands consistent engagement, reflection, and flexibility, positioning successful network leaders as “social artists, continually tweaking the knowledge network design” (Pugh & Prusak, 2013, p. 83).

**Theory of Action**

This capstone, in many ways, documents my own design efforts as a network leader. Grounded in the research presented about field building, networks, and the demands of cross-sector leadership, I crafted a theory of action for how I would support JFF to leverage the member leads within the PtoP Network to strengthen the Network and the field. As shown in Figure 5, the theory includes inputs (if I…), strategic project-bound outcomes (then I will…), and longer-term outcomes and impacts that drive the work but are outside of the scope of this strategic project and the residency.
<table>
<thead>
<tr>
<th>If I...</th>
<th>Then I will...</th>
<th>And then...</th>
</tr>
</thead>
</table>
| ● Facilitate the PtoP leadership team to identify the goals of engaging the PtoP Network member leads | Build the interest, capacity, infrastructure, and strategy necessary for collaboration across PtoP Network member leads to move the Network and the career pathways field forward. Specifically:  
  ○ There will be interest, energy, and momentum for additional work together  
  ○ Network member leads will have increased capacity to do their own organizational work  
  ○ The internal and external conditions will be set for future engagement and partnership with Network member leads  
  ○ PtoP will have a strategy for engaging the Network member leads in the future | ● The career pathways field will be stronger, with increased and improved policies, practices, and outcomes for young people.  
  ○ JFF will be a stronger convener with greater impact in the career pathways field  
  ○ PtoP member leads will feel a great sense of connection to and affinity for the PtoP Network and will continue membership  
  ○ The PtoP Network will attract new members |
| ● Convene the PtoP Network member leads in an engaging learning experience that  
  ○ Elicits their hopes and visions for the Network  
  ○ Builds a shared sense of belonging and leadership in the Network  
  ○ Aligns to PtoP’s goals for the Network | | |
| ● Establish some quick wins that create value for both member leads and the PtoP team | | |
| ● Intentionally design activities to foster a network mindset | | |

*Figure 5. Theory of action for the strategic project.*

In other words, I will have established the infrastructure and foundational strategy for future work with the PtoP Network member leads that will produce gains for the field that are not otherwise possible by individual organizational leadership. The following sections outline my efforts to operationalize and analyze the various components of this theory through a focused strategic project.
Description

My strategic project at JFF was intended to advance the Network and the career pathways field by leveraging the leadership within the PtoP Network. Its framing, both internally and externally, centered around a key question: What can we do together that we cannot do alone? How can we—as a group of individual member leads, as a JFF-Network member collaboration, and as a national cross-sector network—transform the sector in ways that independent efforts cannot? Ultimately, the work was in service of a stronger network and a stronger field.

The project emerged from a period of immersion and exploration during my first two months of residency. During that time, I closely shadowed the three members of the core leadership team—Amy Loyd, Associate Vice President at JFF and my supervisor, and two Directors. I was committed to identifying a project that (1) was a strategic priority for PtoP leaders, (2) presented clear value to the PtoP team and their work with the field, and (3) demanded strong vision and leadership. The idea of bringing the PtoP Network member leads together, proposed by my colleague in a conversation about potential bodies of work, seemed to meet the criteria and tentatively became one focus area of my residency. The project was intended to serve as a foundation for moving forward with a focused subnetwork within the Network. The goal was to emerge with a strategy, a set of conditions and structures, and a clear set of next steps that would build on that foundation to transition from talking across agencies to collaboration. Looking back at how the project evolved and unfolded, it can be organized into five stages:
1. Problem Identification (July - August)
2. Alignment and Planning (August - October)
3. Leadership Symposium (October)
4. Identification of Concrete Next Steps (November)
5. Coordination of Collaborative Activities (December - April)

The Leadership Symposium, an invitation-only meeting of leads held the day before the Network-wide 2018 Fall Institute, was a focal point of the project. Each phase, detailed below, involved both internal work with the PtoP team and external work with the member leads.

**Stage 1: Problem Identification (July - August)**

The primary objective of the initial stage was to deepen my understanding of the problem that was driving the PtoP leadership team’s desire to work differently with the member leads. Given that the project was often framed as “a leads strategy,” I wanted to be sure that the problem was not defined simply as the absence of a leads strategy. I was interested in situating the leads strategy within a larger PtoP strategy, surfacing a problem of practice that existed outside of the specific context of the leads. In other words, to what problem, if any, was a comprehensive approach to working with Network member leads a possible solution?

During this stage, I gathered as much data as possible about PtoP’s work through conversations with the PtoP team, strategic planning documents and meetings, and observations of the work with stakeholders in the field. I listened for the ways that people talked about the Network in order to better understand
the overall goals and priorities of PtoP and the possible roles of the Network within them. As an additional component of problem identification, I also examined previous efforts to engage the leads. I reviewed agendas, meeting notes, and surveys to get a sense of the framing and tone of prior engagement efforts. Who was invited? Who attended? What were the goals and objectives, either explicitly stated or implicitly enacted? Were there any connections across the meetings? This research provided historical context for the work and elevated potential design and implementation considerations.

**Stage 2: Alignment and Planning (August - October)**

Equipped with a deeper sense of the problem, as defined from multiple perspectives across the organization, the second stage focused on establishing alignment toward a common vision specific to the Network member leads. It required both an articulation of a vision and the communication of it, within the PtoP leadership team and with the Network member leads. I worked toward alignment through two primary leadership actions. The first action was an internal one. I led a series of meetings, iterative in nature, with the PtoP core and extended leadership teams. The meetings were intended to continue to clarify and prioritize the goals of the work with leads, then to operationalize those goals. For example, a September 20 meeting had two primary agenda items: “Getting aligned on our goals” and “Draft agenda” (see Appendix E.) These two

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2 In addition to the core leadership team, the extended PtoP leadership team includes Bob Schwartz and Nancy Hoffman, co-founders of the Pathways to Prosperity Network and active contributors to and leaders of the work.
components—the alignment and the planning—were constantly discussed during this stage of the project.

The second leadership action was externally focused. Originally, there was a plan to organize a group pre-call to preview the emerging agenda and set the stage for the upcoming in-person pre-institute meeting. However, very few leads responded to an initial email from Amy and I had a difficult time imagining a call setting the ideal tone for the kind of collaboration we would be seeking. Therefore, I decided to conduct separate calls with as many of the leaders who would be attending as possible. Of the 24 confirmed attendees, I spoke with 14. The 20-minute conversations were framed for leads as an opportunity to share PtoP’s current thinking about the meeting and to get their thoughts and feedback. However, the calls were also designed to establish rapport, foster a sense of belonging, and gauge initial reactions to our thinking. I asked the leads questions that explored their roles and identities as leaders in the career pathways field and surfaced their hopes and fears for our time together. Prior to each call, I met with the PtoP team member who serves as the primary point person for each of the states and regions in the PtoP Network. They offered important insights into the history of the partnership, successes and challenges, political contexts, and interpersonal dynamics.

I used this iterative stage of learning, aligning, and planning—both internally and externally—to inform the design of the Leadership Symposium.
Stage 3: Leadership Symposium (October)

The Leadership Symposium was a core component of the strategic project. It was an opportunity for in-person engagement of the leads situated within the context of the PtoP Network Institute. Hosted at the Harvard Graduate School of Education, the symposium included a two-hour session followed by an unstructured networking reception and dinner. I viewed this meeting as foundational in terms of mindset and buy-in, so setting the tone was important. At the end of the meeting, we hoped to have generated a sense of possibility and excitement for collective work. We wanted them to leave with an utter lack of closure, excited for the work ahead and hungry for more. Specific next steps were not the goal; instead, we sought to elicit the ideas and energy from which those next steps would come.

During our internal planning, I offered an orientation of exploration; “What if we…?” became a way to frame the work. Within this framing, the leadership team debated the merits of including perspectives from outside of the Network for a series of short provocations. In that format, we would invite guests from Harvard or elsewhere to briefly share a provocative idea to spur new thinking. Bob Schwartz, one of the authors of the original Pathways to Prosperity report and co-founder of the PtoP Network, made a strong case for positioning the leads themselves as the source of ideas. If our goal was to draw on and elevate the strengths of leaders within the Network, he argued, then we should start modeling that. We did. I crafted an agenda, included in Appendix F, that reflected an overall commitment to centering the voices of the leads in the discussion and...
building connections, informed my pre-calls and multiple rounds of brainstorming and feedback with the PtoP leadership team. I intentionally structured it to balance relationships, theoretical framing, ideas, and possible actions, with a consistent focus on the career pathways field. At the end of the session, I distributed a brief survey (see Appendix G) to capture reactions and inform next steps.

**Stage 4: Identification of Concrete Next Steps (November)**

By design, the Leadership Symposium did not land on concrete next steps within the confines of the two-hour meeting. However, I recognized the critical importance of having clear, tangible next steps. My goal was to build on the momentum from the time together, ideally within a month. Immediately following the meeting, I synthesized the survey responses from the Leadership Symposium and developed a set of collaborative activities that reflected the interests and energy of the leads. The activities, presented in Figure 6, were designed to offer multiple points of entry with a range of commitment demands. They were also designed to deliver concrete, tangible value to the individuals, the Network, and the career pathways field.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Proposed timeline</th>
<th>Level of commitment</th>
<th>JFF role</th>
</tr>
</thead>
<tbody>
<tr>
<td>O365 Group to facilitate communication</td>
<td>Launch by week of 11/17; revisit in Spring 2019</td>
<td>Low: Everyone will have access to the group; you decide your level of engagement</td>
<td>Finalize contact list; manage the Group; assemble a “Meet the Leads” document</td>
</tr>
<tr>
<td>Webinars: Leadership through metrics</td>
<td>Once every 6-8 weeks, beginning in December 2018</td>
<td>Low to Medium: Presenters will need to prepare according to the protocol; participants show up and engage</td>
<td>Design protocol; solicit/support presenters; set up WebEx; document/upload content</td>
</tr>
<tr>
<td>Working group pilot: Data and metrics</td>
<td>Start planning ASAP; launch early 2019</td>
<td>High: Engage in regular meetings and contribute time and resources to creating products</td>
<td>Participate as a member of the working group; provide necessary launch support</td>
</tr>
<tr>
<td>Critical friends groups (planning)</td>
<td>Design an approach and process to pilot in the future</td>
<td>Medium: Engage in regular meetings to design and test a plan</td>
<td>Participate as a member of the planning team; provide coordination and logistics support, as needed</td>
</tr>
<tr>
<td>Site visit</td>
<td>Attached to the 2019 Spring Institute (Note: Additional peer site visits may be initiated and coordinated by individual leads)</td>
<td>Low (except for the host): Attendees commit additional travel time and resources</td>
<td>Reach out to specific partners once the Institute location is finalized; provide coordination and logistics support</td>
</tr>
</tbody>
</table>

Figure 6. Proposed leads activities.

To propose and discuss these possible next steps, I invited the leads to select one of two follow-up webinars in mid-November. The conversations were an opportunity to reconnect the leads to the discussions that we began at the Leadership Symposium and to each other. The agenda for the webinar is included in Appendix H. For the first session, I had a scripted outline (see Appendix I) with a few open-ended prompts to encourage reactions and feedback. It was flat, with long silences and minimal engagement from the leads. I felt like a robot, which was the opposite of the dynamic I believed the early sessions needed to sustain momentum. Therefore, I revamped the structure for
the second session to include more opportunities to engage with specific questions and ideas. It was better, as evidenced by increased engagement, although I have continued to work to develop and hone my facilitation of virtual learning and collaboration. Following the webinars, I asked leads to complete another brief survey to assess interest and energy.

**Stage 5: Coordination of Collaborative Activities (December - April)**

The first four stages focused on setting a tone and honing a vision for collaborative work. The final stage was about implementation and learning. The goal was to do something together, but with a constant eye toward setting up structures and conditions to support and sustain future doing. Two mindsets capture my intended approach during this stage: (1) participate and support, not own, and (2) pilot and adapt, not finalize. As captured in the last column of Figure 6 above, PtoP’s role was to be fully engaged in the work and to ensure that it was driven by the needs, interests, and capacities of the member leads. In addition, the activities were framed as evolving bodies of work; the six-month period between the two PtoP Network Institutes would serve as an opportunity to pilot a handful of structures that demanded different levels of commitment. In this way, I hoped to expand the collective knowledge about the content of career pathways and the process of collaborative leadership. I also hoped to produce a few quick wins that addressed felt needs and demonstrated the value of a leads subnetwork within the larger PtoP Network.

As of early March, I have launched the 0365 Group, the “Leadership Through Metrics” webinars (usually called virtual workshops), and the planning
phase of data and metrics working groups. The progress and current status of each activity is summarized in Figure 7.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Progress</th>
</tr>
</thead>
</table>
| **O365 Group to facilitate communication**   | • Worked with internal IT team to set it up  
  • Launched in mid-November  
  • Relevant files from all leads activities are stored there  
  • Plan to revisit at Spring Institute |
| **Webinars: Leadership through metrics**      | • Scheduled two 45-minute sessions  
  o January 24 (done)  
  o March 7 (planned)  
  • Plan to revisit and set up a more regular schedule at Spring Institute leads meeting |
| **Working group pilot: Data and metrics**     | • Facilitated two planning meetings with interested leads  
  • Identified three lead-generated projects  
  • Working with project leads to identify next steps |
| **Critical friends groups (planning)**        | • Not currently underway  
  • Plan to use Spring Institute leads meeting to better understand interest and value |
| **Site visit**                                | • Not currently underway  
  • To my knowledge, there were no additional site visits across leads |

*Figure 7. Current progress of proposed leads activities (as of March 2019).*

The most substantial activities have been the webinar series and the data and metrics working group. The first webinar took place on January 24 and featured a presentation by one of the leads. She shared her new and evolving work to visualize success indicators to simultaneously support schools in pathways development and support students in their success planning. She showcased an interactive tool (see Figure 8) that she produced, previewed her
desired next steps, and invited feedback and questions from the group. The second webinar is scheduled for March 7.

![Figure 8. Screenshot from first Leading Through Metrics virtual workshop.](image)

In addition to the “Leadership Through Metrics” webinars, I facilitated two organizing meetings for leads interested in collaborating with others on a specific data project. Three leads proposed specific, concrete data project ideas in an initial organizing meeting on January 14. They wrote clear descriptions of the projects in preparation for a second organizing meeting on February 7, which focused on gauging interest across members and planning next steps. I am currently working with these three project leads to determine appropriate timelines, processes, and roles for the proposed data projects.

Informed by data emerging from these activities, I am also preparing for another in-person convening of the leads in conjunction with the next PtoP Network Institute in April.
Evidence to Date

In my theory of action, I describe a strategy to “build the interest, capacity, infrastructure, and strategy necessary for collaboration across PtoP Network member leads to move the Network and the career pathways field forward.” I have identified a range of evidence sources connected to what has worked and what has not worked in reaching the goals of the strategic project. Through survey responses, meeting artifacts, and planning documents, I was able to track the progress of the member leads network and respond accordingly. I have organized my evidence into these four intended outcomes of my work, aligned to the bullets delineated beneath them in the theory of action. The subsequent analysis further unpacks and makes sense of the evidence within and across the areas.

Interest

My theory of action stated: “There will be interest, energy, and momentum for additional work together.” I observed significant evidence of interest among the Network member leads at each stage of the project. I was curious about both the initial energy and interest and the sustained energy and interest over time and across different activities. Prior to the Leadership Symposium, the leads expressed a general sense of enthusiasm for the opportunity to connect with other leads and a desire to engage in meaningful work together. All invited participants either attended, identified someone else from their team to attend in their place, or declined due to stated personal or professional circumstances. In several cases, there was a request to invite additional team members to join the
meeting. A total of 23 leads from 14 member states and regions attended both the meeting and the dinner.

The responses to a post-Symposium survey provided additional evidence of interest among member leads. The complete responses are included in Appendix J and capture both narrative reactions and levels of interest in additional opportunities. Of the 23 responses to a question about sources of excitement, the leads had an overwhelming focus on connections to colleagues, including enthusiasm about “a vehicle to more aggressively leverage this state-to-state work” and “folks eager to squeeze more out of this network.” Leads also indicated at least potential interest in continuing to stay connected, as shown in Figure 9.

![Survey responses of interest among leads after Leadership Symposium.](image)

**Figure 9.** Survey responses of interest among leads after Leadership Symposium.

A high level of engagement and stated interest continued between the in-person meetings. After the follow-up webinar in November, I sent a quick survey to gauge interest and target my communication. A summary of responses is shown in Figure 10. Across the proposed activities, there was a critical mass of leads who were definitely interested, plus more who were possibly interested.
Within specific activities, interest has been strong among a core subgroup of the leads. The first virtual workshop was attended by at least one lead from six different Network member states or regions. In a couple of cases, leads asked if they could invite interested colleagues to join. Also, one lead who was unable to join requested that we record the session. I did, then shared it with the full leads group. Similarly, the data and metrics working group has attracted an unexpected amount of interest. While my original hope was to establish a single working group to serve as a pilot of a collaborative process, three distinct lead-proposed projects are in the early stages of formation. As the three projects vary considerably in terms of content, scope, audience, and desired product, they will demand different approaches to the problem. The variation will enable a level of experimentation and process insight that would not be possible with a single pilot.

At this point, it is too early to know whether the engagement will be sustained over time, but there is ample evidence of a foundation of interest in a range of collaborative activities with other leads.

*Figure 10. Survey responses of interest among leads following November webinar.*
Capacity

My theory of action stated: “Network members will have increased capacity to do their work.” Capacity is difficult to quantify and measure. For the purposes of this work, I define capacity as the time, resources, and skills available to engage in collaborative activities that lead to desired outcomes, at both individual and organizational levels. I have limited and inconsistent evidence of the degree to which I have been able to expand the capacity of member leads. In terms of time and resources, one member lead captured a primary tension of the work in the post-Institute survey: “Will this yield what we need versus the time it may take?” To date, many leads have given notable time and resources by attending the Leadership Symposium, participating in pre-calls, joining webinars, preparing project descriptions and presentations, joining calls, and completing surveys; the capacity benefits for them, if any, are not entirely clear to me. I have, however, gathered some early evidence of increased capacity relative to knowledge and skills. For example, one post-Institute survey response referenced “language and tools to use moving forward” and multiple PtoP team members heard leads referencing the Symposium content in subsequent meetings and sessions with their own teams. In addition, the two bodies of work focused on data and metrics have an explicit focus on building individual and collective data literacy. As those activities are just beginning, I currently have insufficient evidence of the extent to which leads have gained knowledge, skill, or capacity through the virtual workshops or the nascent working groups.
Infrastructure

My theory of action stated: "The internal and external conditions will be set for future engagement and partnership with Network member leads." On the post-Symposium survey, one member lead asked, “What is PtoP’s vision on how to support cross-team connections and collective mission and goal work?” I think about conditions across two dimensions: functional structures and mindsets.

The twice-annual Network Institutes provide build-in infrastructure as opportunities to convene the leads when they are already planning to be in the same place. Beyond this overall infrastructure, I have developed structures and processes to support the collaborative work. For example, in response to a high degree of interest in having access to a listserv for sharing and communicating, I set up an O365 Group. The platform enables members to send emails to the group, view previous email chains, and access shared documents. Thus far, I have been the only one to send emails through the platform, so it exists but is not serving its intended purpose. Additionally, I developed a protocol (included in Appendix K) for the series of virtual workshops dedicated to discussing metrics and led by leads, which has provided a loose structure for our conversations.

Finally, I am actively in the process of launching one or more working groups focused on specific data challenges and interests. I have drafted a structure, informed by improvement science and networked improvement communities, to guide the early stages of that work (included in Appendix L).

From a mindset standpoint, I consistently delivered messages emphasizing network mindset components, referring to “working documents” and
inviting ideas and feedback. In addition, the statements and behaviors of leads provided evidence of an emerging network mindset within the subnetwork. For example, during correspondence about the nascent working groups focused on data and metrics, one lead wrote, “Candidly I think other states may be ahead of us in the transfer area, so any help in terms of policy would be great there as well.” This statement highlights a mindset of collective intelligence, resisting the notion of a single expert actor. In general, there is a demonstrated willingness to share and learn together, in a spirit of open information and making connections. These are important conditions for future collaboration.

**Strategy**

My theory of action stated: “PtoP will have a strategy for engaging the Network member leads in the future.” I have developed and implemented different components of a “leads strategy,” although the long-term strategy is incomplete. My early planning documents illustrate a series of very intentional decisions and leadership moves and the iterative nature of an evolving strategy. Many components of the strategy are outlined in the previous section about how the work unfolded: my meetings with colleagues prior to my pre-calls, my work with the leadership team to better understand the history and larger vision of the PtoP Network and the work with member leads, and the crafting of activities based on what I was learning from leads. Alignment between stages and the use of an ongoing feedback loop are evident in my talking notes from the follow-up webinar, included in Appendix I. Within individual activities, I developed a plan through the next in-person meeting in April. Beyond these short-term strategy
moves, I have not worked with the PtoP leadership team to finalize a clear long-term strategy for the collaboration across the leads, although conversations are underway.

In this section, I have presented evidence of interest, capacity, infrastructure, and strategy from a range of sources. From the perspective of my original theory of action, I have made notable progress toward the intended outcomes. However, the subnetwork is nascent and its long-term goals are emerging. I am left with a dissatisfying sense that it is too early to measure the extent to which these foundation-setting steps adequately position PtoP to reach its larger field-building aims. In the analysis that follows, I examine the why beneath the progress and status of the strategic project.
Analysis

The development of the subnetwork of PtoP Network leads has many layers and possible areas for analysis. For the purposes of this capstone, I am most interested in an analysis of the strategic components of network design. Why did events unfold the way they did? How did my design decisions impact the ways they unfolded? Specifically, I will focus on two themes that emerged from the evidence that seem particularly important to the outcomes of the work:

● **Delivering value**: I have generated some buzz around collaborative activities among the leads. However, the early evidence of interest contains a degree of hesitance. I refer to this as the “yellow zone”—the state of maybe, but not definitely, being interested. I will use the jobs-to-be-done theory to analyze the goals and value propositions beneath stated interest.

● **Navigating uncertainty**: I have built several structures to support engagement and collaboration. Yet, I did so with a belief in the importance of an emergent strategy that could be flexible and responsive. I also wanted those structures to be co-designed and co-owned. I will use frameworks from emergent strategy, improvement science, and constructionism to examine the nature of uncertainty in network design. I will also consider my role and PtoP’s role in navigating the opportunities, challenges, and tensions of not knowing.

Together, these two themes drive my sensemaking as a network designer and leader in the context of the leads subnetwork.
Delivering Value

From the start of the strategic project, I was interested in the value proposition of the PtoP Network—for members, for JFF, and for the field. For the purposes of this analysis, I am most interested in examining the assumptions I made about value across stakeholders and the ways I used (or failed to use) that value to effectively move the work forward.

In the early stages of the project, I spent a lot of time trying to clarify the goals of a leads subnetwork. The PtoP leadership team articulated a vision for something collective and ambitious, repeating phrases like “elevating our gaze” and “field building.” I created a matrix (Figure 11) that attempted to combine the four distinct network goals outlined by Pugh and Prusak (2013) and the concept of a chain of impact described by Network Impact and the Center for Evaluation Innovation (2014) to ground my own and the team’s thinking. On the horizontal axis is the type of knowledge—existing or new—that will emerge from the network activities. On the vertical axis is whether the intended locus of impact is an individual context or a collective one.
As I originally made sense of the matrix, our stated goals landed in the upper half—collective, as opposed to individual, in nature. We designed the Leadership Symposium based on those goals: we suggested *The Strong Field Framework* as pre-reading, discussed collective scale, and oriented around the lack of a strong career pathways field as the problem we were trying to solve. During the pre-calls, I outlined our vision for the session and the leads subnetwork and solicited hopes for the time together. Although there was a high degree of energy and enthusiasm for the concept of a leads network, there seemed to be a disconnect between PtoP’s big vision and the leads’ stated hopes. The leads did not push back on the vision I was communicating, but their responses overwhelmingly described a desire to connect with other leads and learn from them—goals that seemed to land in the lower half of the matrix. There were themes of innovation and collaboration, but almost exclusively insofar as
those conditions would help them do their own work better. Perhaps they shared field-focused visions, but mostly as a nice-to-have bonus to other goals that felt more immediate, salient, and concrete. The value proposition they were describing was different than what we were proposing.

At that time, the different orientations to the work felt like a tension to me, as I considered the dangers of misalignment. I found myself trying to balance what felt like two sets of different, and possibly conflicting, goals. The jobs-to-be-done theory can reveal possible sources of the tension I was experiencing and provide insights into design implications.

Clayton Christensen of the Harvard Business School, a leading researcher of disruptive innovation, developed the concept of jobs to be done to refer to “the progress that the customer is trying to make in a given circumstance—what the customer hopes to accomplish” (Christensen, Hall, Dillon, & Duncan, 2016, p. 56). The jobs-to-be-done theory posits that we “hire” and “fire” products based on their ability to help us do a particular job. The question at the core of the theory was captured by one of the post-Symposium survey responses: What do folks really want from this Network? It speaks to a value proposition for a given “customer.” In other words, leads “hire” the Pathways to Prosperity Network with the hopes to accomplish something. What is it? More specifically, to what extent does the leads subnetwork align to those wants and needs?

As outlined above, Stage 1 of the strategic project focused on problem identification. What problem was I trying to solve? Or, what was the job to be done? I now recognize an invisible assumption hidden in the question we were
asking. We understood the job as our job: what was our job to be done? We were oriented primarily to the “and then” portion of the theory of change—progress in the broader Network and the field, expertise as convener, and continued membership—and less to the intermediate “then” outcomes for leads like connection, capacity, and engagement. I propose that the large number of leads in the so-called “yellow zone” is at least partially due to a mismatch between design decisions that oriented around JFF’s value proposition and the value proposition that felt most important to the leads. If the initial session was designed primarily through the lens of a distant, field-focused value proposition, leads likely did not have a clear sense of near, concrete value to them and their work. The larger vision was critical for strategy development and grounding; however, in order to realize the longer-term goals, it was necessary to also identify the member leads’ jobs to be done, and then to design the subnetwork accordingly.

The jobs-to-be-done analysis causes me to rethink my original conceptualization of the knowledge-impact goal matrix, specifically in the context of a network oriented toward field building. From the perspective of the network designer, there needs to be a distinction between ends and means. The four goals indicated in the matrix can be understood as ends for a given network; they are the reason for that network’s existence. The leads subnetwork is very clearly intended to have PtoP Network-level and, ideally, field-level implications. However, the means to those ends matter tremendously. Only through responsiveness to the goals and priorities of the leads could the subnetwork’s
larger goals be met. Bryk et al. (2015) captured this sentiment well: “Networked science aims to exploit how the social intelligence of a group can accelerate not just individual learning, but a whole profession’s capacity to learn and improve” (p. 12). It is not individual or collective; the leads subnetwork can provide the structures and activities that simultaneously deliver individual value and joint value. Demonstrated value to one’s own jobs generates further investment in the promise of Level-C learning and evolves network capacity to strengthen the field.

In this analysis, I have mostly been referring to the functional dimensions of the jobs, or the extent to which the leads subnetwork provides the skills, knowledge, and mindsets needed to accomplish one’s goals. However, an important component of the jobs-to-be-done theory is that jobs also have social and emotional dimensions (Christensen et al., 2016). In other words, what the leads are seeking to accomplish through the subnetwork goes beyond the concrete products of the work. They want to feel connected to others, not just to learn things but also to feel less isolated in the complex work of system-level leadership. In their eight design dimensions of knowledge networks, Pugh and Prusak (2013) highlighted the role of the “expert-learner duality,” which “makes it safe for even the expert to be vulnerable and learn and for the learner to speak of bold possibilities” (p. 54). For leads, such a space has a social and emotional value proposition. Although I was not explicitly thinking about social and emotional jobs to be done at the time, I designed all of the sessions and activities with an awareness of the social and emotional needs of the leads. For example, as I prepared for the Leadership Symposium, I used the SCARF model by David
Rock to guide my design. Rock studies the intersection of social neuroscience and leadership, which explores the biological foundations of social and emotional needs. He developed the SCARF model to help people navigate across five domains of human social experience by minimizing threats and maximizing rewards (Rock, 2008). Figure 12 outlines the five domains and the ways I tried to mitigate or address potential SCARF threats.

<table>
<thead>
<tr>
<th>Domain</th>
<th>Description (Rock, 2008)</th>
<th>Design considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Relative importance to others</td>
<td>Conducted pre-calls; de-emphasized titles on name tags and during introductions; emphasized identity as Network leaders; strategically selected presenters; hosted dinner at Harvard Faculty Club</td>
</tr>
<tr>
<td>Certainty</td>
<td>Ability to predict the future</td>
<td>Previewed the draft agenda during pre-calls; elicited fears; sent the final agenda prior to meeting and provided a printed copy at the meeting; stated objectives; identified next steps, including a specific date for a follow-up webinar</td>
</tr>
<tr>
<td>Autonomy</td>
<td>Sense of control over events</td>
<td>Made clear connections between what I heard in pre-calls and decisions we made; distributed survey to get feedback and measure interest, and emphasized that next steps would emerge from that feedback</td>
</tr>
<tr>
<td>Relatedness</td>
<td>Sense of safety with others</td>
<td>Provided structured opportunities to connect with others to share ideas and challenges; used smaller groups; focused on “what we can do together that we cannot do alone”; interspersed regular table discussions; provided space for informal dinner conversation</td>
</tr>
<tr>
<td>Fairness</td>
<td>Perception of fair exchanges between people</td>
<td>Kept numbers of invited participants relatively even across sites; organized session to maximize voices</td>
</tr>
</tbody>
</table>

*Figure 12. Design considerations using the SCARF model (Rock, 2008).*

By bringing intentional focus to the SCARF domains during planning, I was able to elevate the expert-learner duality, build a sense of community, and address the social and emotional jobs that the subnetwork might be hired to do.

Overall, the jobs-to-be-done theory highlights the complex roles that the Network and subnetwork play for the leads. It also reveals the important role that the leads play for the Network, PtoP, and JFF. Further, these two sets of jobs to
be done—from the perspective of the leads and from the perspective of the Network and the field—can reinforce each other. The theory helps to illuminate my successes and challenges related to interest and capacity. Specifically, it highlights ways that PtoP can deliver value in order to sustain and leverage interest in service of a stronger career pathways field. To better understand my successes and challenges related to infrastructure and capacity, I need to think about navigating uncertainty.

Navigating Uncertainty

As I attempted to design a network with strong internal and external value, a significant challenge was navigating uncertainty and not knowing while building interest, capacity, infrastructure, and strategy. This part of the analysis focuses on the nature of uncertainty during the network design process. Design decisions that I or the team made (or did not make) resulted in various forms of uncertainty, elevating several key tensions that have informed the work to date.

Much of the uncertainty was strategic in nature, the result of a deliberately emergent strategy. Through ongoing feedback loops, flexible structures, and multiple entry points into the work, I attempted to create what Kania and Kramer (2013) described as “an ongoing progression of alignment, discovery, learning, and emergence” (para. 7). In this context, alignment refers to the degree to which the activities and structures align to the jobs that both the Network and the leads are “hiring” the subnetwork to do. I used the pre-calls to design the agenda for the Leadership Symposium. I identified topics and structures for collaborative activities through analysis of the post-Symposium survey responses. The
working groups evolved based on the interests and needs of those engaged. At each point, we were able to pivot, a core characteristic of highly effective networks (Henig et al., 2015).

Strategist Harry Mintzberg, a leading researcher on deliberate versus emergent strategy, would likely classify the intended leads strategy as an *umbrella strategy*.\(^3\) Mintzberg and Waters (1985) explained:

Like the entrepreneurial strategy, the umbrella one represents a certain vision emanating from the central leadership. But here those who have the vision do not control its realization; instead they must convince others to pursue it. The umbrella at least puts limits on the actions of others and ideally provides a sense of direction as well. Sometimes the umbrella takes the form of a more specific target, as in a NASA that concentrated its efforts during the 1960s on putting a man on the moon. In the light of this specific target, all kinds of strategies emerged, as various technical problems were solved by thousands of different specialists (p. 263).

An umbrella strategy has bounded uncertainty; it provides network member agency within the confines of an overall vision or target. I encountered two distinct challenges in the ongoing design of the subnetwork as I navigated uncertainty: defining those boundaries and balancing structure and agency. Both challenges demand an interrogation of JFF’s role in the leads subnetwork.

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\(^3\) Mintzberg and Waters described a deliberate-emergent continuum and present several types of strategies that fall along it “to try to gain some insights into the notions of intention, choice and pattern formation in the collective context we call organizations” (p. 259). The umbrella strategy was the fourth out of eight strategies along the continuum from deliberate to emergent.
What are the confines of the so-called umbrella in an umbrella strategy? And who decides? At the outset of the strategic project, the possibilities for what the leads subnetwork could be and do seemed infinite under an enormous umbrella of leadership within the PtoP Network and the career pathways field. I experienced a tension between the importance of having a clear purpose and the process of identifying that purpose. Bryk et al. (2015) provide some guidance in the context of networked improvement communities (NICs) that is relevant here. Improvement science pushes for a clear focus around a specific, well-defined problem. While our subnetwork was not designed to be an NIC, it similarly faces “a classic chicken-or-egg question: Do we convene a small team to orchestrate the up-front work of refining the problem...? Or do we first assemble the interested partners and have them identify a problem to pursue together?” (p. 160). My design decisions tended to lean toward the latter, where I was very hesitant to set a specific focus or identify a specific problem. I was committed to buy-in and shared ownership and was operating under an assumption that an inclusive approach to defining the work was most conducive to those outcomes. Ironically, I spent so much time facilitating the process of identifying areas of interest and need that it hindered shared ownership of the actual work. Colleagues or leads sometimes referred to the activities of the subnetwork as “Heather’s work” and a few leads ended our conversations inviting me to let them know what I needed. Meanwhile, from my perspective, what I needed was to know what they needed. Particularly in early planning meetings, I was equating the improvement science principle of user-centered with user-driven, potentially
at the expense of getting started so that they could own the work rather than trying to let them own every part of the process. I did not need to involve the leads in every step and every decision (user-driven) in order to target their goals and needs (user-centered), and I could have made some strategic decisions to define the so-called umbrella to move the work forward.

Directly related to the leadership and design challenges of boundary definition was the challenge of balancing structure and agency. One of the post-Symposium survey responses offered a recommendation for improving future meetings: “More tightly facilitated to get at specific outcomes for the network” (see Appendix J). They were hungry to get to work and getting to work demanded structure and “tight” facilitation. My theory of action recognized the importance of building infrastructure for the goals of the leads subnetwork. I aimed to design structures that could both guide the work and be flexible and responsive to a range of member needs.

My decisions were informed by a working theory about the relationship between structure and agency. The relationship between structure and agency is connected to the SCARF threats outlined previously. Designing an experience that fosters a sense of certainty can push up against a sense of autonomy, and vice versa. Yet, both are critical to both functional aspects of the work and to social and emotional ones. The structure-agency tension is similar. A common but hidden assumption in the design of many institutions frames the relationship between structure and agency as inversely proportional: an increase in one leads to a decrease in the other (Brennan, 2013). From this perspective, I would want
to limit structure within the leads subnetwork in order to maximize agency. However, Brennan (2013) presented them as reciprocal rather than at odds: “We have agency through structure and we have structure through agency” (p. 26). Rather than an inversely proportional relationship, this orientation suggests a more independent one, as illustrated in Figure 13.

![Diagram: Two Conceptualizations of the Structure-Agency Relationship]

**Figure 13.** Two conceptualizations of the structure-agency relationship.

My goal was to be in the upper right area of the structure-agency matrix, where both agency and structure were high. If I map the structures of the subnetwork’s individual activities onto the matrix, many of them support high agency and have at least nascent structure, as reflected in much of the evidence I provided (e.g., protocols, agendas, and planning notes). At the subnetwork level, however, I have not yet achieved the desired level of balance between structure and agency. The subnetwork is not yet positioned, from a structural perspective.

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4 This is the same Karen Brennan as the one referenced in the Introduction, designer and instructor of the course Designing for Learning by Creating.
perspective, to consistently and strategically amplify the energy and innovative ideas of the leads. More specifically, its activities live outside of what formal membership means and entails, as well as outside of the many day-to-day responsibilities of the leads’ roles. From the perspective of Pugh and Prusak’s (2013) eight design dimensions, the subnetwork does not have an operating model that clearly specifies roles, responsibilities, and decision processes. Much of this uncertainty is due to the emergent nature of this new work, but there are also aspects that are due to my focus on the leads activities more than the whole.

Overall, this analysis has examined the complex roles of value and uncertainty in the evolution of the leads subnetwork. Both elevate the opportunities, challenges, and tensions of emergent design and network leadership. What do these findings and analyses mean? I will now outline implications of the strategic project for my own leadership, for PtoP, and for the education sector.
Implications

Implications for Self

I began this capstone with a question: What does it mean, as a leader, to create spaces that support tinkering, creativity, and innovation? Throughout the strategic project, I was aware of my role as a designer of conditions—for learning, for trust, and for impact. As I reflect on my network-building and field-building efforts, I am interested in the ways that the work has reinforced, challenged, and shaped my leadership commitments and identities.

When I interviewed for residency at JFF, I asked about organizational and team fit: What are the important characteristics for a resident to have in order to be successful in this setting? The part of the answer that stood out to me was that the position would require a high tolerance for ambiguity. The work, they explained, is not typically linear and is often in flux. Such an organizational context was simultaneously exciting and terrifying. I knew, on a cognitive level, that system-level leadership demands the skills of navigating complex, tension-filled realities without clear solutions. I also knew that I had spent the past two years learning how to embrace ambiguity and uncertainty, and why doing so was often challenging for me. A residency with PtoP, then, was an opportunity and a test. Could I put my new understandings, mindsets, and skills into practice in order to lead transformational change? To compound the challenge, I took on a strategic project within the inherently ambiguous space of network design. Bryk, et al. (2015) captured the challenges well: “[Network] Participants must be able to tolerate ambiguity, to work with plausible competing conceptions that seemingly...
push in opposite directions, and to live with the uncertainty as to exactly how everything will come together” (Bryk et al., 2015, p. 163). Not only was I existing in such an ambiguous and uncertain context, but I was also leading in one. In the spirit of bringing together seemingly contradictory or competing ideas, I identify three themes of the strategic project with implications on my future work as a system-level leader. Each involves two concepts separated by the word “and,” highlighting my ongoing work to make sense of complexity and ambiguity.

**Our jobs and your jobs.** Emerging directly from the jobs-to-be-done analysis, my work with the leads subnetwork has elevated the importance of defining unique value propositions across stakeholders. By *our jobs*, I am referring to internal, organization-focused needs. What purpose does the leads subnetwork serve *for us*? How does it fit within larger organizational priorities? As someone who cares deeply about alignment across goals, strategies, and actions, those questions were essential. However, I also needed to understand *your jobs*, or the needs of the Network member leads. Recognizing the functional, emotional, and social reasons that the leads were “hiring” the subnetwork enabled me to make strategic design decisions. My leadership style has always been an observant and analytical one, paying close attention to behaviors, patterns of engagement, and spoken and unspoken reactions. I have added new lenses to my observation and sensemaking, focused on a range of both individual and collective jobs.

**Emergent solutions and intentional outcomes.** The strategic project pushed me to continuously grapple with the challenges and opportunities of
emergence. The concept of emergence can suggest an absence of planning and an “anything goes” attitude. From that perspective, emergence feels irresponsible. However, this strategic project has enabled me to explore the possibilities at the intersection of emergence and intentionality. Kania and Kramer (2013) captured the essence of such an orientation: “[Leaders] have embraced a new way of seeing, learning, and doing that marries emergent solutions with intentional outcomes” (para. 8). I made sense of the emergence-intentionality intersection by recognizing that uncertainty about solutions can be strategic, but only if the desired outcomes are thoughtful and clear. While I attempted to embrace a deliberately emergent orientation, I experienced personal and professional tensions. Sometimes it felt unfocused. Most times it felt uncomfortable. I wondered if I was doing it “right.” I questioned what “right” even means in emergent design. I am continuing to grapple with the balance, as I see emergence and intentionality as critical components of driving innovation and transformational change, within networks and otherwise. Deliberate emergence will require a redefinition of success from a narrow focus on a specific outcome to a commitment to constant learning. My strategic, analytical approach to work has consistently been a hallmark of my leadership; going forward, I will continue to leverage those strengths and also embrace the opportunities that come with not knowing.

Managing and leading. Was I managing the leads subnetwork? Or was I leading the leads subnetwork? The strategic project illustrated the distinct need for both, as well as the challenges of negotiating a dual identity as manager and
leader. Particularly in moments when I was feeling uncomfortable with the degree of uncertainty in the network design process, I had a bias toward management. There were many moving parts and I worked to ensure that communication was clear, calendars were aligned, and processes were efficient. As I described my role within the leads subnetwork, I often positioned myself in terms of logistical and administrative support. It felt important—and satisfying—to get things done. However, in networks and otherwise, I recognize that management is insufficient. As a leader, I have to set a vision, then mobilize and sustain action toward that vision across a range of stakeholders.

As I sought to balance management and leadership, I sometimes struggled to make sense of their coexistence. In an early draft of my capstone, I wrote that my goal was to “participate and support, not lead” in the context of the leads activities. Amy commented, “Why not lead?” The question forced me to confront some of my hidden assumptions about leading and leadership. When I wrote that goal statement, I was thinking about shared ownership; I wanted the work to be ours or theirs, not mine. In other words, “not leading” was, in my mind, an act of leadership. I am tempted to suggest that I simply chose the wrong word, which I changed to “not own” in a later draft. However, I think there is an important implication for my leadership in the way that I was framing “leading” as something counter to shared ownership. I want to share ownership. I want to be a leader who creates the necessary conditions and structures and works alongside others or steps aside. Amy’s comment was a reminder that such actions are a way of leading.
I entered JFF with the promise and challenge of leading in a setting that demands a high tolerance for ambiguity and flexibility. Those are characteristics that are essential for success far beyond a residency at JFF. I am increasingly learning to embrace the “and” across competing ideas and commitments. Doing so remains simultaneously exciting and terrifying, but I am convinced that it is necessary for the kind of change that I want to lead.

Implications for Site

This capstone has focused primarily on the design of a leads subnetwork, which currently exists as a short-term experiment. The long-term strategy for the leads subnetwork necessarily lives within a long-term strategy for the PtoP Network, which necessarily lives within a larger strategy for PtoP, which necessarily lives within a larger strategy for JFF. This section examines the implications of my findings and analyses across some of these layers.

My early efforts to engage the leads have surfaced some important insights about interest, capacity, infrastructure, and strategy. As I consider the extent to which the PtoP team is positioned to integrate those insights into actions that will drive the Network and the field forward, I offer a set of three questions. The questions do not have easy, clear, or “right” answers. Instead, they are intended to prompt reflection, discussion, and strategic thinking.

What is the value proposition of the PtoP Network? Using the jobs-to-be-done theory, I explored the reasons that leads might “hire” the leads subnetwork, recognizing that there are functional, social, and emotional jobs to be done. Extending that analysis, it is important that PtoP ground its next steps in
the distinct value proposition of the PtoP Network. Why do people join the Network? Why is it important for PtoP to continue to have the Network? The answers to these two questions are related but distinct, and both are critical for crafting PtoP’s future. A different way to ask these questions about value in a more provocative way is: If PtoP went away, what would be lost—for PtoP and JFF, for Network members, and for the field? On the other hand, what can be gained by more deeply understanding the potential value of the Network? The knowledge-impact matrix in Figure 11 provides a useful framework for identifying and prioritizing functional goals. However, based on my interactions with the leads and the patterns of engagement, I believe that the Network is also hired for important social and emotional jobs. What are they? How do we know?

During strategic planning conversations about the future of PtoP and the Network, one question surfaced again and again for me: what is the difference between joining the PtoP Network and otherwise enlisting JFF to support career pathways work? Most often, the internal answer is about funding and flexibility: the membership fee structure enables work that is less prescriptive in nature and can support more innovative, collaborative approaches. Such reasons are rarely satisfying to me. When the Network-versus-non-Network distinction focuses on service delivery, it misses the point. I believe there is an incredibly compelling rationale for being a part of the Network that is currently underrealized and that the leads work has helped to illustrate. Network membership should not be defined, solely or primarily, as the services one receives from JFF. Those services are undoubtedly important and provide tremendous value to sites. But
what do they have to do with being a part of a network? In my opinion, network membership should be less about access to services and more about access to an experience. Networks are about connections. They are about learning and doing together, across contexts. In other words, the benefits of Network membership should be defined as what one uniquely gets from being a part of a network beyond the services provided by JFF.

**What does it mean to be in the PtoP Network?** The first question focused on the why of Network membership. This one focuses on the what. In many ways, the leads subnetwork has served as an incubator to test ways of leveraging the network capabilities of the PtoP Network. I wonder what it would look like to shift some of those activities away from add-on, optional opportunities for leads to core components of what it means to be in the Network. If there is unique value in the Network related to collaboration and learning across members, as my strategic project suggests, then the Network must be designed to deliver that value. Specifically, this is a recommendation to align the Network membership structure and processes to the Network’s value proposition. For example, if the value proposition is regular and consistent engagement with other leads, then it would be important that such opportunities to connect are a part of membership. There would be structures to connect, such as peer visits, leadership convenings, or peer learning communities, that would be funded through the membership fee. If the value proposition is about one’s identity as a leader, then it would be important to build the “brand” of PtoP Network leads and develop a clearer leads designation. In general, the network activities should be
recognized as distinct from, and ideally complementary to, traditional PtoP services like asset mapping and technical assistance, aligned to specific value propositions.

**What is the role of JFF, and specifically the PtoP team, within the PtoP Network?** Throughout this capstone, there has been an emphasis on roles, particularly in the context of networks. A Network model that repositions membership as access to collaborative activities with other members demands a different kind of role for JFF. Currently, JFF plays an important role as the hub of the PtoP Network. They organize Institutes, deliver services, and share learnings and expertise across sites. Members primarily interact with JFF and connect to other members through JFF. In this context, they are a hub-as-center. From the perspective of service delivery, hub-as-center is an appropriate role. As we imagined the work with leads, however, we recognized a hub-as-center role as problematic to our goals of supporting coordination and collaboration. We imagined JFF on the outside, working alongside leads, as a new way of orienting to the Network. In other words, what would it look like for JFF to be a node rather than the hub? The node orientation was also problematic, as the leads subnetwork required clear infrastructure and capacity to support the activities. I did not want JFF to be the center of the subnetwork, but I also recognized that it required some central organizing capacity. Informed by hub (Bryk et al., 2015) and backbone (Kania & Kramer, 2011) models and based on my analysis, I suggest an alternative framing. Rather than a transition from hub to node, I propose a transition from hub-as-center to hub-as-container. Consider a
description of Carnegie’s hub model intended to distinguish it from a hub-centric model:

In Carnegie’s model, the hub is “first among equals,” tending to the health and wellbeing of the network and supporting integrity of implementation of powerful ideas. It delineates an initial problem; recruits leaders and champions into the work; establishes rules, roles, and responsibilities for participation; creates an initial conceptual framework; and offers analytical and technical infrastructure for the work. Carnegie’s hub is less an enforcer and more a gardener (Clyburn, 2011, para. 3).

As hub-as-container, JFF is both inside and outside; they are part of the work but also around it and guiding it. JFF can support individual bodies of work, but can also set up structures and conditions through which members can engage with each other. JFF is expert and learner. An example of such a model is Carnegie Math Pathways, a national network focused on improving student learning and success in mathematics.5 While the content and approach are quite different than the PtoP Network, the role of WestEd in cultivating and sustaining the network could provoke new ways of thinking about PtoP’s role.

Regardless of the specific model, network activities require ongoing intentionality and capacity. As such, they need to be built into the Network’s business model. Doing so will have implications on individual roles, recruitment, pricing, organizational structure, internal and external framing, and every other aspect of the work PtoP currently does. The shift requires vision, strategy, and

5 See carnegiemathpathways.org for additional information about Carnegie Math Pathways.
alignment, which require dedicated time and funding. It is important to note that these shifts also have implications on individual and organizational identities, both within PtoP and for Network members. Who is PtoP outside of the PtoP Network? Could the Network disappear and PtoP continue? What would be lost, and what would be gained? The next steps will require thoughtful network design and leadership that considers the many tensions captured throughout this capstone.

**Implications for Sector**

Systems change in education demands cross-sector collaboration, coordination, and innovation. Individual efforts in individual contexts, regardless of their quality and leadership, will not suffice. The case for networks, then, is often an easy one to make, as they can connect people and ideas in powerful ways. In the context of my strategic project, I was specifically interested in the kinds of networks that exist to generate collective knowledge, action, and impact. Such networks have field-building aims, seeking to codify knowledge and practices, strengthen visible leadership, and define and measure success. The findings outlined in this capstone have implications for networks and fields beyond the career pathways context. Grounded in confidence that effective networks can strengthen fields, I suggest three actions to drive change in the education sector: (1) focus on leaders; (2) design intentionally; and (3) identify fields.

**Focus on leaders.** The Bridgespan Group’s (2009) Strong Field Framework (see Appendix A) highlighted leadership as a key component of a
field’s strength, defined as “influential leaders and exemplary organizations across key segments of the field” (p. 5). The leads subnetwork offers a possible model to develop leadership through a focused network that addresses the unique strengths and needs of system-level leaders.

Part of the strength of the subnetwork is the composition of its membership. It includes high-level leaders from a range of organizational, geographic, political, and role contexts across various parts of the education sector. From a field-building perspective, collaboration and translation across such diversity—what improvement research refers to as *adaptive integration* (Bryk et al., 2015)—is an incredibly powerful opportunity to drive innovation. The leads subnetwork also demonstrates that networks can provide an important space where leaders feel less isolated as they navigate the complex work of systems change. Thus, leaders contribute to networks, and they also benefit from them.

**Design intentionally.** My strategic project emphasizes that an effective network starts with a simple question: *Why?* Why does the network exist? What are its goals? Networks are often proposed as solutions to problems of fragmentation, communication, and scale. People aren't talking to each other, so let’s start a network. We want to spread our great idea or framework or product, so let’s start a network. We just wrote this report about career pathways and people are excited about it, so let’s start a network. But the existence or creation of a network does not necessarily advance a collection of individuals or organizations toward a specific goal. Pugh and Prusak’s (2013) four distinct
goals of knowledge network provide a useful frame for aligning network activities to desired outcomes and impacts, and the leads subnetwork demonstrates the ways that different goals and activities interact with one another.

There is a second important question that drives an effective network: **How?** The leads subnetwork required a tremendous amount of strategic planning, resources, and sustained coordination. Dedicated time, funding, and leadership are critical to the success of a network, particularly when a network aims to build a field.

**Identify fields.** The leads subnetwork and the larger PtoP Network are focused on the career pathways field. It is an emerging field with a need for strong cross-sector coordination and, in many ways, a fundamental reimagination of how we educate young people in the United States. What other fields need to be established or strengthened across the education sector? More specifically, what are the vexing problems in the education sector that demand a focused, coordinated, system-level strategy? Networks, and specifically networks of leaders, can be a powerful vehicle to strengthen the fields that tackle those problems.

In my work with the leads and in my analyses, I have been compelled by the promise of Level-C learning, as outlined by Bryk et al. (2015):

In essence, Level-B learning augments what individuals may learn on their own (Level-A). When individual insights are systematically pooled, collective capacities grow. Moving this to Level-C learning radically speeds up this social learning process. When many more individuals,
operating across diverse contexts, are drawn together in a shared learning enterprise, the capacity grows exponentially (p. 143).

I have observed—and facilitated—the power of Level-C learning. Based on my work with the leads and my reflections on the complexity of networks, I have also been thinking about what the next level of learning would look like. In other words, what is Level-D learning? I imagine Level-D learning as the process of learning across networks that are learning across institutions, as illustrated in Figure 14.

*Figure 14. A proposed visual for Level-D learning.*

Inspired by the concept of Level-D learning, I propose field-building as a field itself, where the emphasis is on developing a deeper understanding of the process of building fields. As we seek to radically transform the sector to better serve all young people, what fields are important and how might we build them?
Conclusion

An opening session at the 2018 Pathways to Prosperity Network Spring Institute outlined five goals of the Network: (1) shared learning, goals, impact; (2) coordinated cross-stakeholder engagement; (3) economies of scale and increased capacity; (4) shared data, metrics, and analysis; and (5) coalition of policy advocates (Loyd, 2018). The vision is, and always has been, impact beyond individual contexts. In this capstone, I have explored the Network member leads—a group of high-level leaders from a range of contexts and roles—as a potential lever for reaching the field-level goals of the PtoP Network.

I chronicled a deliberate design process that centered around a key question: *What can we do together what we cannot do alone?* The strategy was grounded in an assumption that individual efforts, the Network, and the field would be stronger if we could find new ways to create, learn, and do together. The leads displayed consistent interest in coordination and collaboration, generating some early momentum for future work together. I also established capacity, infrastructure, and strategy that will be necessary to support and sustain the leads network.

Throughout my analysis, I focused on the ongoing work to make sense of complexity and ambiguity as a network leader. I identified structures and activities in the leads subnetwork that simultaneously delivered individual value for the leads and joint value for the Network and the field. I attended to functional dimensions of the work, such as the acquisition of knowledge and skills, as well as less tangible social and emotional dimensions. I was clear and deliberate
about our goals and ensured the strategy toward those goals was flexible and responsive. I created structure and facilitated agency. I led and managed. It was a constant balancing act that illustrates the complexity of cross-sector collaboration and systems change. As I conclude my residency and embark on my next steps as a leader, I continue to see myself as a designer of conditions—for learning, for trust, and for impact—in networks and otherwise. I am better equipped to deliver value and navigate uncertainty in pursuit of systems innovation and transformation.

Overall, my findings offer insights into the promise of networks to support field-building through careful design. While the subgroup is nascent and the long-term strategy is still emerging, I have established a foundation from which the leads subnetwork can evolve, with exciting potential for increased engagement within the Network. I believe that the leads subnetwork is positioned to accelerate the impact of the PtoP Network on individual members and on the career pathways field, redefining what career preparation looks like and ensuring access to economic advancement for all.
References


Appendix A

Pathways to Prosperity Members
Appendix B

Pathways to Prosperity Menu of Services

NETWORK MEMBERSHIP
MENU OF SERVICES FOR SCOPE OF WORK

The Pathways to Prosperity Network—a collaboration of states and regions, Jobs for the Future, and the Harvard Graduate School of Education—seeks to ensure that many more young people complete high school, attain postsecondary credentials with currency in the labor market, and launch careers while leaving open the prospect of further education. Key stakeholders from education, business, and government lead the work in each Network state and region, committing to at least three years of membership with the long-term goal of creating statewide systems of rigorous, relevant, and engaging grade 9-14 career pathways that serve most students. Pathways focus on high-growth sectors of the economy, including STEM fields such as information technology, health care, and advanced manufacturing.

CORE SERVICES FOR MEMBERS IN THEIR FIRST YEAR

For each state or region in its first year of membership in the Network, JFF and HGSE will:

- Provide each Network member with a liaison as well as access to JFF/HGSE team members with a variety of areas of expertise.
- Develop, in partnership with state/regional leads, a one-year scope of work aligned with the member’s goals and needs and tailored to the member’s work plan.
- Hold tri-annual calls with state/regional leads and Pathways to Prosperity leadership to take stock of the work in the state/region and discuss any needed adjustments to the member’s annual scope of work.
- Host two Network-wide institutes per year and connect Network members to a peer-learning community of other states and regions in the Pathways to Prosperity Network and content experts across JFF.
- Provide members with access to a Pathways to Prosperity website that provides states and regions a way to connect with one another and serves as a central repository for tools and information from across the Network.
- Support state/regional leads in planning for quarterly state- or regional-level steering committee meetings and attend meetings in person or via teleconference as needed.
- Collaborate with state/regional leads on the development of a document that lays out a vision and core guiding principles for the Pathways work in the state or region.
- Conduct asset mapping and analyze labor market information in one region and provide the member with an asset mapping report and executive summary.
• Present regional asset mapping findings and recommendations to stakeholders in a public forum.

• Co-create with state/regional leads a 12- to 18-month regional work plan based on asset mapping findings.

• Supply an annual report at the end of each membership year that provides an overview of the work done during the year, can be used to support the development of a state/regional work plan for the coming year, and helps members ensure that they are making the best use of JFF’s services.

CORE SERVICES FOR CONTINUING MEMBERS

For each state or region beyond its first year of membership in the Network, JFF and HGSE will:

• Provide each Network member with a liaison as well as access to JFF/HGSE team members with a variety of areas of expertise.

• Develop, in partnership with state/regional leads, a one-year scope of work aligned with the member’s goals and needs and tailored to the member’s work plan.

• Hold tri-annual calls with state/regional leads and Pathways to Prosperity leadership to take stock of the work in the state/region and discuss any needed adjustments to the member’s annual scope of work.

• Host two Network-wide institutes per year and connect Network members to a peer-learning community of other states and regions in the Pathways to Prosperity Network and content experts across JFF.

• Provide members with access to a Pathways to Prosperity website that provides states and regions a way to connect with one another and serves as a central repository for tools and information from across the Network.

• Support state/regional leads in planning for quarterly state- or regional-level steering committee meetings and attend meetings in person or via teleconference as needed.

• Supply an annual report at the end of each membership year that provides an overview of the work done during the year, can be used to support the development of a state/regional work plan for the coming year, and helps members ensure that they are making the best use of JFF’s services.
MENU OF SERVICES

TECHNICAL ASSISTANCE AND CAPACITY-BUILDING

- JFF and HGSE will work with leaders in states and regions beyond their first year in the Network to develop a scope of work that includes technical assistance and capacity-building services tailored to the member’s goals and needs for the Pathways work. Network members are asked to prioritize and select among the services listed in the categories of work below; if the state/region has interests and needs beyond this list, the Pathways team will work with the member to develop tailored services.

- JFF will provide guidance on crafting a scope of work that corresponds to the standard Network membership fee; members receive points based on level of membership fee, and those interested in additional services may purchase additional points.

STRATEGIC PLANNING AND DEVELOPMENT

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document that lays out core guiding principles for member’s pathways work</td>
<td>Development led by state/region and supported by JFF</td>
<td>55</td>
</tr>
<tr>
<td>Map of initiatives in a state or region</td>
<td>Describes how Pathways intersects with and advances other related policies and initiatives; led by state/region and supported by JFF</td>
<td>115</td>
</tr>
<tr>
<td>One 3-day workshop in Boston</td>
<td>Professional development, individualized strategic planning, and technical assistance to state and regional leads; can include sessions on other areas of JFF’s work, such as strategies for opportunity youth and adults; led by JFF at Boston headquarters</td>
<td>150</td>
</tr>
<tr>
<td>Staffing plans and job descriptions</td>
<td>One state or regional staffing plan (or two regional); up to five job descriptions; led by state/region and supported by JFF</td>
<td>45</td>
</tr>
<tr>
<td>Intensive consulting with JFF experts beyond the PtoP team</td>
<td>To explore ways to leverage the pathways work to serve additional populations</td>
<td>165</td>
</tr>
<tr>
<td>Participation of additional team member in PtoP Network Institute</td>
<td>For each additional team member beyond a standard team of 10</td>
<td>25</td>
</tr>
</tbody>
</table>
### POLICY DEVELOPMENT

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-depth scan of policy supports and barriers</td>
<td>Identification of state, system, and district policy supports and barriers; includes advice on best policies and practices</td>
<td>195</td>
</tr>
<tr>
<td>State/regional strategy for alignment of Pathways work with key federal initiatives and policies or with sector strategies</td>
<td>Federal policies include Perkins and WIOA state planning, as well as funding strategies</td>
<td>295</td>
</tr>
</tbody>
</table>

### ASSET MAPPING

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset mapping report and executive summary presentation for one region</td>
<td>Conduct asset mapping in a single region, analyze LMI, and produce a report based on findings</td>
<td>365</td>
</tr>
<tr>
<td>Presentation of asset mapping findings</td>
<td>Present regional asset mapping findings and recommendations to stakeholders in a public forum</td>
<td>105</td>
</tr>
<tr>
<td>Stand-alone brief or presentation with labor market analysis</td>
<td>Includes analysis of key industries in a single region</td>
<td>35</td>
</tr>
</tbody>
</table>

### REGIONAL PATHWAYS DESIGN AND MOBILIZATION

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>12- to 18-month regional work plan</td>
<td>Co-created by JFF and state/regional leads; based on asset mapping findings</td>
<td>55</td>
</tr>
<tr>
<td>Support agenda development for a statewide Pathways convening or regional institute</td>
<td>Focus on regional Pathways development</td>
<td>100</td>
</tr>
<tr>
<td>Facilitation for 1-day statewide Pathways convening or regional institute</td>
<td>Number of JFF staff members to be determined jointly by JFF and state/regional leads; points listed are for one JFF staff member</td>
<td>85</td>
</tr>
<tr>
<td>Statewide survey for identification of promising regions</td>
<td>Data-driven identification of regions across the state in which to implement Pathways; includes a detailed analysis and rationale</td>
<td>160</td>
</tr>
<tr>
<td>Service Description</td>
<td>Description</td>
<td>Cost</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Regional leadership training and professional development</td>
<td>Includes training on the resources, tools, and approaches for launching, scaling, and sustaining Pathways in new regions; builds capacity by using a “train the trainer” approach</td>
<td>140</td>
</tr>
<tr>
<td>Facilitation of regional Pathways steering committee or planning team meeting</td>
<td>Agenda development: focus on developing work plans and designing and implementing strategies around the Pathways levers</td>
<td>90</td>
</tr>
<tr>
<td>Tailored tool or resource for regional Pathways design and implementation</td>
<td>May include adaptations of existing resources (e.g., 9-14 Pathways action steps, student recruiting brochures, skills maps, site observation tool, employer handbook) or the creating of new tools and materials. The total number of points will depend on the complexity of the proposed tool and the staff time needed to develop it.</td>
<td>150–300</td>
</tr>
<tr>
<td>Skills mapping</td>
<td>Includes 3 facilitated sessions with employers and educators and a customized map of employability skills for a single Pathway</td>
<td>225</td>
</tr>
<tr>
<td>Intensive consulting: secondary and postsecondary alignment</td>
<td>Includes support in reverse-engineering 9-14 programs of study from employer needs and regional economies and aligning and integrating Pathways from high school to and through postsecondary and into the workforce</td>
<td>165</td>
</tr>
<tr>
<td>Intensive consulting: intermediary design and development</td>
<td>Includes support in building capacity and developing strategies for funding intermediary functions and organizations</td>
<td>165</td>
</tr>
<tr>
<td>Intensive consulting: work-based learning continuum design and development</td>
<td>Includes support in designing and developing an intentionally sequenced set of WBL opportunities mapped backwards from careers and postsecondary programs of study</td>
<td>165</td>
</tr>
<tr>
<td>Suite of professional development for teachers around implementation of Possible Futures, Possible Selvies middle school STEM career exploration curriculum</td>
<td>Curriculum includes lesson plans, pacing guides, and teacher implementation materials</td>
<td>445</td>
</tr>
</tbody>
</table>
## COMMUNICATIONS AND MARKETING

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications and marketing strategy and plan</td>
<td>Addresses issues of making the work visible to interested parties, building public will for Pathways, and leveraging funding for ongoing growth and sustainability; one state or regional strategy/plan; led by state/region with support from JFF</td>
<td>100</td>
</tr>
</tbody>
</table>

## FUNDRAISING

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising strategy, which incorporates braided funding model, to accelerate, catalyze, and sustain the work</td>
<td>Includes identifying and meeting with potential funders, assistance with grant-writing (&lt;$1M), and/or assistance with budgeting processes</td>
<td>215</td>
</tr>
<tr>
<td>Support in developing RFP for state or regional competitive grant process</td>
<td>Support in developing RFP for state or region, scoring rubric, criteria</td>
<td>50</td>
</tr>
<tr>
<td>Review proposals for state or regional competitive grant process</td>
<td>Up to 200 total pages</td>
<td>150</td>
</tr>
<tr>
<td>Review and comment on proposals for major grants</td>
<td>Support in writing a single, large (&gt; $1M) grant; Led by state/region and supported by JFF</td>
<td>20</td>
</tr>
<tr>
<td>Co-write proposal for major grant</td>
<td>Support in writing a single, large (&gt; $1M) grant; Led by state/region and supported by JFF</td>
<td>100</td>
</tr>
</tbody>
</table>
Appendix C

Strong Field Framework

<table>
<thead>
<tr>
<th>Standards of Practice</th>
<th>Knowledge Base</th>
<th>Leadership and Grassroots Support</th>
<th>Funding and Supporting Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Codification of standards of practice</td>
<td>Credible evidence that practice achieves desired outcomes</td>
<td>Influential leaders and exemplary organizations across key segments of the field (e.g., practitioners, researchers, business leaders, policymakers)</td>
<td>Enabling policy environment that supports and encourages model practices</td>
</tr>
<tr>
<td>Exemplary models and resources (e.g., how-to guides)</td>
<td>Community of researchers to study and advance practice</td>
<td></td>
<td>Organized funding streams from public, philanthropic and corporate sources of support</td>
</tr>
<tr>
<td>Available resources to support implementation (e.g., technical assistance)</td>
<td>Vehicles to collect, analyze, debate and disseminate knowledge</td>
<td></td>
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<tr>
<td>Respected credentialing/ ongoing professional development training for practitioners and leaders</td>
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</tbody>
</table>

*Figure C. The Strong Field Framework. From Bridgespan Group (2009, p. 5).*
Appendix D

Network Health Scorecard

Looking for a way to assess the health of your Network?

Answer these questions for a basic network diagnosis of strengths and areas of growth. Refer back regularly and you can use your score to identify and track progress in key areas of network development. (We suggest quarterly.)

How to use this scorecard:

- Ask each network member to fill out an individual scorecard.
- Enter individual scores in a collective table, indicating the number of members selecting particular scores to tabulate network results.
- Together consider the results. What patterns do you see? What results need further discussion? Over time, what has improved? What hasn’t? Why?

<table>
<thead>
<tr>
<th>NETWORK PURPOSE</th>
<th>Not so much</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. All members share a common purpose for the network.</td>
<td></td>
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<tr>
<td>2. Together, members have identified strategic goals and objectives for the network.</td>
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<td>3. Network plans reflect network goals.</td>
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</table>

<table>
<thead>
<tr>
<th>NETWORK PERFORMANCE</th>
<th>Not so much</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Members are working jointly to advance network goals.</td>
<td></td>
<td></td>
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<td>5. Members are adding value to each other’s work.</td>
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<td>6. Members are creating new knowledge or insights together.</td>
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<tr>
<td>7. The way the network communicates with stakeholders builds support for the network.</td>
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<tr>
<td>8. The network is creating value for the constituents it serves.</td>
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<tr>
<td>9. The network is able to attract additional network funds, as needed.</td>
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<tr>
<td></td>
<td></td>
<td>Not so much</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
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<tr>
<td>10.</td>
<td>Members honor their commitments to the network.</td>
<td></td>
<td></td>
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<tr>
<td>11.</td>
<td>The network is meeting its strategic goals and objectives.</td>
<td></td>
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</tr>
<tr>
<td>12.</td>
<td>Members are achieving more together than they could alone.</td>
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</tr>
<tr>
<td><strong>NETWORK OPERATIONS</strong></td>
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<tr>
<td>13.</td>
<td>Decision making processes encourage members to contribute and collaborate.</td>
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<tr>
<td>14.</td>
<td>The network anticipates, surfaces, and addresses conflict when it arises.</td>
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<tr>
<td>15.</td>
<td>The network’s internal communications systems are serving it well.</td>
<td></td>
<td></td>
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<tr>
<td>16.</td>
<td>All members are contributing time and resources to the network.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>17.</td>
<td>The work of the network is attuned to the comfort and energy levels of members.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18.</td>
<td>Members reflect on network experience and adjust network practice accordingly.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19.</td>
<td>The network has mechanisms in place to promote accountability among members (e.g., agreements, understandings).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>NETWORK CAPACITY</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20.</td>
<td>As a network, members have the material resources needed to advance network goals.</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>21.</td>
<td>As a network, members have the skills they need to advance network goals.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22.</td>
<td>As a network, members have the connections they needed to advance goals.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**YOUR ADDITIONAL CHECK-UP QUESTIONS HERE**


Appendix E

Leadership Symposium Planning Meeting Agenda

Pathways to Prosperity Leadership Symposium
Planning Meeting – 9/20/2018

Details
- Monday, October 22, 2018
- 3:30-5:30p Meeting (GCC 2)
- 6p Dinner (Faculty Club)

Updates (10-10:10)
- RSVP
- 20-minute calls are happening
- Questions
  - By when do we need final numbers/choice/allergies for dinner?
  - Who should be there from the JFF team?
  - HI? Marlborough?

Getting aligned on our goals (10:10-10:30)
- Possible framing (see following pages)
  - Knowledge network goals: (1) Coordination, (2) Learning/Innovation, (3) Translation/Local Adaptation, (4) Support of Individual Members
  - Network Health Scorecard
  - Three Dimensions of Focus for a Network Evaluation
  - Strong Field Framework
- Of the leads network
  - Cultivate and position leadership in the field
  - Increase sense commitment to the PtP Network, recognizing it as essential to advancing individual and collective work
- Of the 10/22 meeting
  - Align on purpose and possible areas of focus
  - Demonstrate value
- Of the phone calls
  - Establish rapport
  - Preview agenda and get a sense of hopes/goals
  - Gather useful baseline data

Draft Agenda (10:30-10:50)
- Welcome/Intros (3:30-3:45)
  - Minimizing SCARF threats [e.g., intros, seating, air time, clear agenda, etc.]
- Setting the context (3:45-4)
  - How can we leverage the PtP network to move the work and the field forward?
  - What can we do together that we cannot do alone?
- Provocations (4-5:15)
  - 3-5 10(“) minute presentations
    - What’s the focusing question that will serve as an umbrella for the provocation (and the subsequent debrief/sense-making)? This should drive our choice of speakers and the framing we provide.
    - Does it make sense to think of these in terms of topic? (e.g., Amy mentioned the challenge of making a case for pathways in times of governance change)
    - People who have been mentioned: Monica Higgins (scale?), Kathy Boudett (NICs), Irvin Scott (change/impact/his new network/something else), Paul Reville (state leadership lens), Marty West, Dave Deming, Mandy Savitz-Romer
    - These asks need to go out ASAP
      - Debrief/sense-making
  - What ideas do these generate? What might this mean for our work together?
- Looking ahead (5:15-5:30)
  - Next steps/commitments
  - Eval/survey/something
  - Share times for a follow-up group call
Appendix F

Leadership Symposium Agenda

PATHWAYS TO PROSPERITY
A JFF & HARVARD GRADUATE SCHOOL OF EDUCATION INITIATIVE

Leadership Symposium
Monday, October 22, 2018

AGENDA

3:30-3:45
Welcome / Intros

3:45-4:00
Setting the context / Elevating our gaze
Kyle Hartung and Amy Loyd will frame the objectives of the session, situating the career pathways field at the center and building on previous conversations among Network leaders.

4:00-4:30
Doing together what we cannot do alone: What if we...?
What can we do together that we cannot do alone? How can we leverage the Network to elevate our individual and joint work and leadership, and propel the field forward? Remarks by a few Network leaders—Steve Daclin, Luke Rhine, and Abby Jo Sigal—will provoke visionary thinking about the work together as PtoP leads.

4:30-5:15
Scaling for impact
Dr. Monica Higgins, the Kathleen McCartney Professor of Education Leadership at the Harvard Graduate School of Education and faculty chair of HGSE’s Scaling for Impact initiative, will present and facilitate a discussion on scaling for impact. We will think beyond individual contexts to our collective scale. How do we scale career pathways work across the Network and to the field? How is this work similar to and different from scaling work in our individual contexts?

5:15-5:30
Looking ahead

6:00-8:00
Cocktail reception and dinner
Join us for a cocktail reception at 6:00, followed by dinner at 6:30 at the Harvard Faculty Club, 20 Quincy Street, Cambridge, MA.

Attendees:
Lyle Alshehe, TN
Aaron Ball, AZ
Cynthia Beter, CA-Long Beach
Shannon Cox, OH-Dayton
Steve Daclin, OH
Sarita Dunleavy Keenan, MN
Cindy Erwin, AZ
Michael Fatio, MA-Lawrence
David Fischer, NY-NYC
Jon Furr, IL
Kelly Geers, OH-Dayton
Paul Herdman, DE
Angela Jackson, HI
Lily Laux, TX
Tom Lasley, OH-Dayton
Jerre Maynor, TN
Jenae Myers Twichell, WA
Marcy Raymond, OH
Alyssa Reinhart, TX
Luke Rhine, DE
Dan Riley, MA-Marlborough
Stephen Schatz, HI
Abby Jo Sigal, NY-NYC
David Thomas, PA-Philadelphia
Lisa Stoner-Torbert, DE
Gilda Wheeler, WA
Charlotte Cahill, JFF
Kyle Hartung, JFF
Nancy Hoffman, JFF
Heather Johnson, JFF
Amy Loyd, JFF
Bob Schwartz, JFF
Appendix G

Leadership Symposium Survey

What did you hear today that excites you?  
What worked for you in terms of the format and/or content of today’s meeting?

What lingering questions or concerns do you have?  
What recommendations do you have to improve future meetings like this one?

Indicate your level of interest in structures to facilitate ongoing connection and collaboration:

<table>
<thead>
<tr>
<th>A listerv for leads to share resources/questions/etc</th>
<th>Definitely interested</th>
<th>Maybe interested</th>
<th>Not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Webinars focused on a topic of interest, led by a Network leader</td>
<td></td>
<td></td>
<td>← I could be that Network leader! Y N</td>
</tr>
<tr>
<td>An additional in-person meeting between institutes, hosted by a Network leader</td>
<td></td>
<td></td>
<td>← I could be that Network leader! Y N</td>
</tr>
<tr>
<td>What other ideas do you have for structures?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Name (optional):
Appendix H

Leadership Symposium Follow-Up Agenda

Leadership Symposium Follow-Up
Wednesday, November 14, 2018 or Friday, November 16, 2018

https://jff.webex.com/meet/hjohnson
or join by phone (1-408-792-6300, access: 791 454 661)

AGENDA

Hello!
5 minutes
Who’s on today’s call?
What are the objectives of today’s call?

Reflections on feedback
5 minutes
What are your high-level reactions to the feedback?
How did the Leadership Symposium inform your time at the Institute?

Grounding ourselves
5 minutes
How can we leverage the Network to elevate our individual and joint work and leadership and propel the field forward?

Next steps
15 minutes
Now what?

Reactions/questions
10 minutes
What questions do you have?

Wrap-up
5 minutes
What can you expect and when?
# Appendix I

## Follow-up Webinar Talking Points

<table>
<thead>
<tr>
<th>Time</th>
<th>Section</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:05</td>
<td>Greeting</td>
<td><strong>PRESS RECORD AND POST A MESSAGE:</strong> Hello! I will be recording this session for the purposes of those who are unable to join. Please reach out if you have concerns.*** Hello! I suspect a few more people will jump on, but we have a tight agenda so we’re going to get going. I am excited to be connected again to build on the energy and momentum of our time together in Cambridge a few weeks ago. Thanks so much for joining, then and today. Let’s start with a quick roll call, which will require that folks jump in to say hi. We’ll do what we did last time, which is just name, state/city/region, and agency/organization.</td>
</tr>
<tr>
<td>4:05-4:10</td>
<td>Reflections</td>
<td>Given that this call is really an extension of our time together in October, I wanted to start with a brief opportunity to reconnect with it. Anecdotally, we heard that the conversations lived on beyond the meeting and dinner. I’m hoping that 3-4 people are willing to share any high-level reactions you had to the survey responses OR share how the leads meeting informed your time at the Institute or since.</td>
</tr>
<tr>
<td>4:10-4:15</td>
<td>Grounding ourselves</td>
<td>As we launch into concrete next steps, I wanted to ground us in the purposes of this work: to elevate work and leadership and move the field. What can we do together that we cannot do alone? So we looked at what a field is and what it takes to be a strong field. It is also worth thinking about the goals and intended impact of this network. These two (coordination and innovation) emerged as most in line with the vision for collaboration. It also elevates that some of the work is about sharing existing knowledge across the network and some of it is about creating new knowledge (which you will see reflected in the proposed next steps).</td>
</tr>
<tr>
<td>4:15-4:30</td>
<td>Next steps</td>
<td>Without further ado, let’s dig in. This list of proposed activities is an attempt at synthesis and focus. They are designed to have multiple points of entry with a range of commitment demands. They are also designed to deliver some concrete, tangible value add to this group and/or to the field. I will walk you through each one quickly, but the goal is to maximize the time for reactions and questions.</td>
</tr>
<tr>
<td>O365</td>
<td></td>
<td>On a very basic level, there was an overwhelming desire to be able to connect with each other. The Office 365 Group sort of functions like a listserv, but with additional ways to share information. You can see email chains, access shared documents, and choose the degree to which you want to engage and be engaged. I’ll say two things: first, it’s a bit of an experiment – I haven’t used this platform yet and earnestly invite your feedback along the way. Second, we’ve all been on listservs gone awry. Norms are important, like using reply all and group emails prudently. This will be up and running by the end of the week and I have already uploaded all of the documents from our October meeting.</td>
</tr>
<tr>
<td>Webinars</td>
<td></td>
<td>There was a lot of energy around building a metrics inventory. This is a lower touch way to begin coordination and sharing about ways you are</td>
</tr>
<tr>
<td>Time</td>
<td>Section</td>
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<tr>
<td>8:00</td>
<td>Work overview</td>
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<tr>
<td>8:15</td>
<td>Working group #1</td>
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<tr>
<td>8:45</td>
<td>Working group #2</td>
<td></td>
</tr>
<tr>
<td>9:15</td>
<td>Field trips</td>
<td></td>
</tr>
<tr>
<td>9:45</td>
<td>Reactions/Questions</td>
<td></td>
</tr>
<tr>
<td>10:15</td>
<td>Looking ahead</td>
<td></td>
</tr>
</tbody>
</table>

thinking about and measuring progress and success. My vision is to have a simple protocol that can guide a session that digs into one metric or metric-related practice. This activity is about metrics, obviously, but it is also about leadership development by connecting around powerful practices. It will be informed by and inform the By the Numbers work that has been happening in the Network. (Jon Furr or Cindy Erwin or Nancy Hoffman can say more about that.) Relatedly, if you’re interested in creating a By the Numbers two-pager for your state/region/city, reach out. It would entail having one or two people from a site agree to work with Kim and Nancy using a template they’ve provided.

Next, there are two working groups. The first is a more intense level of commitment and collaboration. It will be a small group of leaders who want to dive in and commit time and resources. It will serve as a pilot of a leader-driven, cross-network project. There are two outcomes of this work: the products (which will emerge from a very specific and defined task) and the process of working across sites on shared challenges.

What might match.com for network leads look like? There was a lot of interest in coordination and creation based on context or priority area or problem of practice. Again, it would be a small working group of folks who are excited to think about what intentional work together might look like. It will be less about product and more about process, with the idea of putting forth a design. But, like the other one, it is lead-driven, JFF-supported.

And finally, site visits (also known as field trips). This is the least defined, but on our radar to think about how to structure our next meeting to include a focused site visit around a compelling question.

I just talked a lot. Reactions? Questions? I am happy to answer questions, but I hope this is also an opportunity to talk to each other (so I will do my best to not feel the need to chime in every time someone speaks!)

What can you expect as immediate next steps? First, there’s an interest form. It’s NOT binding and it’s not terribly specific, but it will help determine where folks want to plug in between now and April. The hyperlink wasn’t working during my test run, so I included the link. It shouldn’t take you more than 3-5 minutes. I’ll also send it through O365 on Friday as a test of that system. Based on interest for the more intensive ones, there will likely be a targeted reach out. Thanks so much for your time and your engagement and your willingness to consider what collaboration and leadership might be! Reach out to me or someone else on the JFF team with any questions or concerns or suggestions and I look forward to the connections ahead!
Appendix J

Leadership Symposium Survey Responses

What did you hear today that excites you?

- Folks eager to squeeze more out of this network
- Folks are working to create a national agenda, common vision and language around career pathways
- It’s always great to hear the enthusiasm of others engaged in this work
- Loved the idea of thinking about the best theory of social action for the work that we are doing
- Connecting like-minded states/regions together
- Talking about scale and strategy with colleagues
- Great conversation which spurred “local” thoughts of next steps
- Enjoyed presentation by Monica Higgins...challenge to blend strategy/capability
- The audacious goal of guiding young people along the path of building wealth for themselves and their families and communities
- Connecting to other state reps in similar roles
- General areas that we are all wrestling with
- Interest in moving from programmatic to systemic; possibility of getting a list of data points that others use
- Good discussion; scaling considerations were interesting and useful
- Closer work with other network states; more state visits
- A vehicle to more aggressively leverage this state-to-state network
- Thinking about how to measure systems change; trend theory of social impact
- It was great to briefly connect with Hi, TN, and DE
- Connecting and spending time with other state teams and really partnering and learning (match.com for states)
- Employer signaling; equity; metrics/eval
- Opportunity to connect with other states
- Getting together with other sites, learning from each other, etc.
- Metrics + data
- Appreciate the opportunity to hear from and meet folks discuss mutually reinforcing activities

What worked for you in terms of the format and/or content of today’s meeting?

- Team time talking about application of theory
- The framing was helpful followed by Prof. Higgins’ overview – team time generated some cognitive dissonance
- Appreciated the time to talk in groups. Also liked hearing from network leaders.
- Liked the chance to share ideas
- Liked Professor Higgins’ presentation – gave us language and tools to use moving forward
- --
- JFF staff rotation (not same voice)
- Guest speaker with actionable takeaway
- Positive way to prime the “conversation well”
- Sitting in the right place...having a practitioner that gets/expects equity to be at center
- Sharing time, table discussion
- Good opportunity for free-ranging table conversation
- Good. I would intentionally mix the teams rather than have them randomly assigned
- Liked having the guiding questions
- I appreciated the switching between presentations and table discussions
- Table conversation; helpful to hear from pathways leaders to get the conversation going
- I liked Dr. Higgins’ targeted content
- Time for table talk interspersed
- --
- We weren’t here for the whole thing, but liked the small group convo of second half
- Round table
- It was a good start to conversation
- It was good – I like the various components
- Talking with members from other states
- Appreciated the guest facilitation (and pre-reading)
What lingering questions or concerns do you have?

- How do I best leverage the JFF team to better take advantage of PtP?
- How to create interim qualitative and quantitative benchmarks so we know how we are progressing
- Would love to further discuss a common framework of metrics/indicators
- Next steps? How do we make this happen across communities?
- ...  
- ...  
- Nothing specific right now
- What do folks really want from this network? Would people put additional work toward shared metrics?
- How can we reinvent the system to facilitate [the audacious goal of guiding young people along the path of building wealth for themselves and their families and communities]?
- Unsure of how the conversation will convert into action
- Will this yield what we need versus the time it may take?
- Hope to be able to dig deeper into finding ways to be more systematic without being tied to immediate results/metrics
- There was little/no consideration of context; this work does not take place in a vacuum
- What is equity? Who is working on a statewide data system?
- How did/do we want to address equity in all its forms?
- ...  
- What is PtP’s vision on how to support cross-team connections and collective mission and goal work?
- Can we create additional learning opportunities outside convenings? Professor lecture via webinar
- PtP/JFF as backbone organization vs or in addition to backbone backbone
- How to move from technical fixes to real adaptive change
- How do we get consensus on the next steps?
- What else can we do to continue to codify standards of practice? I’m particularly interested in network practice towards this

What recommendations do you have to improve future meetings like this one?

- Choosing one issue/pillar to focus on
- Could determine individual POP before the meeting to create some cognitive dissonance and address specific needs
- Maybe a bit more time ☺
- ... 
- Ensure these meetings are a regular part of the PtP Conference
- ... 
- Set the table for longer time together, match folks. Create opportunities for folks to solve problems of practice in other areas
- Involve students: more sharing time
- More tightly facilitated to get at specific outcomes for the network
- Take one of the items and deliver a tangible value add to people in the room
- ... 
- A short brief summarizing the progress and focus of each team
- Continue small table talk with our counterparts
- Provide a little more time
- A little too much to try to pack into this session
- ... 
- ... 
- ... 
- Liked the structure of collaborative time with expert notes
- Love the idea of targeted team matching
Indicate your level of interest in structures to facilitate ongoing connection and collaboration:

<table>
<thead>
<tr>
<th>Structure</th>
<th>Definitely interested</th>
<th>Maybe interested</th>
<th>Not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>A listserv for leads to share resources/questions/etc</td>
<td>16 (73%)</td>
<td>6 (27%)</td>
<td>0</td>
</tr>
<tr>
<td>Webinars focused on a topic of interest, led by a Network leader</td>
<td>10 (45%)</td>
<td>12 (55%)</td>
<td>0</td>
</tr>
<tr>
<td>An additional in-person meeting between institutes, hosted by a Network leader</td>
<td>12 (55%)</td>
<td>9 (41%)</td>
<td>1 (5%)</td>
</tr>
</tbody>
</table>

What other ideas do you have for structures?
- Field trips to visit other teams
- Field trips!
- In-between symposium meetings with Network members "focusing" on similar topics
- Matching with leads
- Problem of practice (place agnostic) remotely supported
- I thought the "match" functionality might be worthwhile
- In-person learning visits

Additional comments
- Very thoughtful discussion. Love the idea of thinking about how communities can work together.
Appendix K

Leadership Through Metrics Virtual Meetings - Draft Protocol

LEADERSHIP THROUGH METRICS
A series of virtual workshops with PtoP Network leaders
Draft protocol – January 2019

OBJECTIVE
The “Leadership Through Metrics” sessions are designed to:
- Define metrics being used across the Network;
- Begin to identify metrics that are common across the Network;
- Engage in cross-sector and cross-context conversations about data and measurement;
- Surface questions that Network members want to tackle together; and
- Build individual and collective data literacy.

PROTOCOL (~30 minutes)
Each session will feature a presentation from a member of the Network or an invited guest to prompt discussion about a specific use of data and metrics in Pathways work.

1. Presentation of the metric(s) (up to 10 minutes)
   - What do you measure?
   - How do you measure it?
   - Why is it important? (What problem does it solve?)
   - What are the challenges?
   - What questions do you have?

2. Clarifying questions (up to 5 minutes)
   - Clarifying questions are simple questions of fact that have brief, factual answers. They are not intended to prompt deeper thinking or offer food for thought—those should be saved for the discussion.¹

3. Open discussion (10-15 minutes)
   - How does this connect to what you are doing?
   - What value can this add to Pathways work?
   - What are the barriers?
   - What are the possible unintended consequences?
   - What else do you want to know?
   - What would the next steps be?

4. Big takeaways / Areas for follow-up (up to 5 minutes)
   - What are your takeaways from this discussion?
   - Are there any areas for individual or group follow-up?

PROCESS DEBRIEF (~5 minutes)
This is designed to be an evolving, learning process. Through engaging in it and then reflecting, we can make it better.
- What worked well for you today?
- What could be improved?

¹ Adapted from “Pocket Guide to Probing Questions” by School Reform Initiative (http://schoolreforminitiative.org/doc/probing_questions_guide.pdf)
Appendix L

Data and Metrics Working Group Guide

DATA+METRICS WORKING GROUP

Stage 1: Learning Plan

Before getting started on the work, the first goal is to get clear on the problem and the process for addressing it. This three-part learning plan outline is informed by improvement science, which is grounded in three key questions:

What is the specific problem I am now trying to solve?
What change might I introduce and why?
How will I know whether the change is actually an improvement?

The categories and questions below are designed to set the foundation for collaborative work together on a specific data project, acknowledging that the answers will likely evolve as the work does. It is intended to serve as a guide to get the work started.

THE TOPIC: What is the work?

- What is the problem we are now trying to solve?
- Why is it important?
- What do we want to create and why?
- How will we measure success?
- What are the anticipated challenges?

THE PROCESS: How will we work together?

- Who will be involved? What are the roles and responsibilities?
- How often will we meet/connect?
- What structure(s) will we use?
- How will we communicate?

THE PROJECT: How will the work get done?

- What needs to happen and when?
- What knowledge and expertise can we tap within the Network?
- What additional capacity and/or expertise is needed?

LEADS
Lyric Alshea, TN
Aaron Ball, AZ
Cynthia Beter, CA-Long Beach
Amanda Burke, AZ
Shannon Cox, OH-Dayton
Steve Dackin, OH
Cindy Enwin, AZ
Michael Flato, MA-Lawrence
David Fischer, NY-NYC
John Fitzpatrick, TX
Jon Furr, IL
Kelly Geers, OH-Dayton
Paul Herdman, DE
Angela Jackson, HI
Heather Justice, TX
Saeen Dunlavy Keenan, MN
Lily Lau, TX
Tom Lasley, OH-Dayton
Jeme Maynor, TN
Sherry Minton, OH
Jense Myers Twitchell, WA
Laura Puntiyana, MA-Marlborough
Marcy Raymond, OH
Aleyna Ravinhart, TX
Lake Rhine, DE
Dan Riley, MA-Marlborough
Stephen Schatz, HI
Abby Jo Sigal, NY-NYC
Amy Smith, CA-Long Beach
David Thomas, PA-Philadelphia
Lisa Stoner-Torbert, DE
Jamar Toussant, TX
Gilda Wheeler, WA