



# The Work Stories Do: How Stakeholder Storytelling Can Support Strategic Renewal

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The Work Stories Do:  
How Stakeholder Storytelling Can Support Strategic Renewal

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

Capstone

Submitted by

Shanna Peebles

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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***“A person is a person because of other people”***

(Translation of Zulu aphorism *Umntu ngumuntu ngabantu* in Senge, et al, 1994)

For my Meemaw,

She got her GED in her forties; then raised me and my siblings with books, music, and belief. College, even though she never knew anyone who'd gone to one, was a place she said I should go. Then she helped that happen with decisions as small as helping me find sheets for my dorm and as large as shifting the little money she and my grandpa had into my account so I could pay for classes. Because of everything she poured into me, I'm graduating with a doctorate from Harvard.

*Cletta M. Stall*

*January 26, 1921-March 21, 2020*

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Thank you to Dr. **Carissa Moffat Miller** for your mentorship and thought partnership. Your willingness to share your process in service of my learning was invaluable to me; Your gifts as an editor made this capstone markedly better. Thank you for the opportunity to learn from you.

If **Karen Mapp** had not graciously reached out to me after we spoke at the same event, I can almost guarantee that the Ed.L.D. program would not have been on

my radar. Thank you, Karen, for inviting me and for teaching me that the more we welcome others into the decisions that affect the children inside schools, the better those schools will be for the children inside them.

Thank you to the mighty members of **CGr8** for holding hands as we walk through the fire. You are truly the neverending story, and I can't wait to see the next chapter for all of us.

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## **Abstract**

Processes to create shared understandings of organizational identity, mission, and vision, and how these experiences might affect culture and offer insight for the strategic plan, have implications for system-level leaders of any organization in the educational sector.

This capstone describes a strategic project of excavating stakeholder interpretations of organizational identity and mission through a shared storytelling process inside the complex environment of a nonprofit organization experiencing retrenchment and staff turnover. It considers the question of how mission and identity arise in shared experiences of storytelling and how this process might generate insights to improve organizational culture.

Evidence from the project frames the capstone's recommendations to create a team-based vision process for refining the mission. It argues that regular opportunities for stakeholder storytelling organically surface shared values, and this process is the first step in organizational learning and the practice of positive cultural development. A final recommendation is the addition of a learning officer role to embed equitable organizational learning in short and longer-term strategic planning.

*Human conversation is the most ancient and easiest way to cultivate the conditions for change —personal change, community and organizational change, planetary change. If we can sit together and talk about what is important to us, we begin to come alive. Margaret Wheatley*

## **Introduction**

So much of organized human behavior seems designed to frustrate, yet we continually approach our meetings with each other in a state of hopeful expectation that this particular experience will be the one where everything somehow changes. Where we will be inspired, edified, enlightened, and, most of all, find connection with these people with whom we spend so many hours. Many of us hold an unspoken longing, like one iterating birthday wish, that our gatherings will address our deepest needs for connection in a way that delights and surprises us. Difficult as it might be for us to admit, we also wish this were so in our workplaces. Note the way we name this desire in the words we use to describe our organizational mission and craft our vision statements. In many nonprofit companies, for example, the aspirational language in its mission and vision statements is hard to match with the often clinical daily work of managing technical issues. When we think of a typical day in an organization, images of people bent over their screens tapping keys or sitting in a small group looking at a whiteboard tend to dominate. At least stock image collections reflect this common picture in our heads.

What would happen if this image were changed? What if our idea of organizational life allowed for the same small groups to turn from the whiteboards

and PowerPoint toward each other to share stories of how they see themselves as part of the work? And what if we thought of invitational, structured storytelling as a multipurpose tool for accomplishing our strategic aims?

A story is the shortest distance between two points, the priest Anthony de Mello said, but it is also an underutilized technology for operationalizing an organization's mission for its stakeholders. Story has the ability to engage emotion and identity in the service of action. For individuals and the companies in which they work, a mission is a story that a business tells itself to define and determine its identity and purpose. In this way, a mission statement becomes a touchstone of certainty, a North Star of guidance. Pressures of declining budgets, staffing turnover, and an uncertain external environment can obscure a mission, removing its ability to speak to a central motivation for the work.

A strong mission orientation is a distinguishing characteristic of the nonprofit sector and a motivating force for most nonprofit organizations. Poorly articulated mission statements cause confusion around the organization's values, further eroding staff motivation and impairing leadership's decision-making abilities. Absent a clear and defining purpose story, organizational principles are easier to decouple from the values that formed them.

Five rationales for focusing on improving the shared understanding of mission through storytelling are found in the practice's ability for it to give direction in difficult times, render tough decisions more transparent, attract like-minded people — both staff and funders — who share the nonprofit's beliefs,

support the organization's culture, which gives shape and purpose to daily work, and to inspire strategic communication. Clarity of the nonprofit's mission can drive strategic planning and create coherence around the organization's identity and value. This capstone seeks to show how a process to initiate these aims fared within a nonprofit organization.

### **Site Context**

Headquartered in Washington, D.C., the Council of Chief State School Officers (CCSSO) is a nonpartisan, nationwide, nonprofit organization of public officials who head departments of elementary and secondary education. It represents all fifty states, the District of Columbia, the Department of Defense Education Activity, the Bureau of Indian Education, Puerto Rico, Guam, the U.S. Virgin Islands, American Samoa, and the Northern Marianas Islands.

The scope of CCSSO's reach is impressive, supporting education leaders charged with improving outcomes for 50 million K-12 public education students and 3.8 million teachers who learn and teach inside 98,280 public schools within 13,601 school districts. Operationally, it performs this service from four intersecting arenas of advocacy, policy, leadership development, and development of professional practice.

Several factors contribute to the need for a national organization of state education leaders, and CCSSO is well-positioned to serve as a cohort convener and facilitator of professional development and conferences for these chiefs. As state policy experts note, "education governance structures differ from state to

state and directly affect how education policy leaders interact.<sup>1</sup> Understanding the differences between structures can help explain the education policy process in terms of how decisions are made and how authority is divided” (Education Commission of the States, 2013).

Structurally, CCSSO is similar to an “umbrella association,” meaning nonprofit associations whose members are themselves associations (Young, 2001), and also a formal membership organization with bylaws and a board composed of members; and also a charitable nonprofit “with limited lobbying allowance but the ability to accept deductible donations” (BoardSource, 2016).

Board membership is role-based and open to each department of education’s superintendent, secretary, or chief of education upon their appointment or election.<sup>2</sup> The CCSSO board is composed of nine active members; there are no emeritus positions.

### **Challenges and Complexity**

CCSSO can be compared to several organizations such as the National Governors Association for its role-based membership; to the Education Commission of the States for its policy work; and the Council of Great City Schools in its advocacy work. As a convener of role-alike professionals, it functions as an association like the National Association of State Boards of Education. As a nonprofit educational organization, it compares to technical

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<sup>1</sup> Education Commission of the States notes four models of state education governance

<sup>2</sup> Arizona, California, Georgia, Idaho, Indiana, Montana, North Carolina, North Dakota, Oklahoma, South Carolina, Washington, Wisconsin, Wyoming elect their state chiefs (Education Commission of the States, 2013).

assistance entities such as Bellwether Education Partners and its professional development and programmatic activities mirror other ecosystem influencers like ASCD. In essence, CCSSO is a metaphorical unicorn; a rare, unusual entity with multiple definitions and functions.<sup>3</sup>

Financially, as a nonprofit business, its revenue and surplus furthers its mission in contrast to a for-profit business which distributes income to shareholders. “To make up for a lack of profit in the core business, nonprofits, almost by definition, run two businesses — the core, mission-oriented business, and a second “subsidy” business based in restricted and non-restricted funding governing the use of operating funds” (Miller, 2017).

As a nonprofit, CCSSO relies upon funding from philanthropy for unrestricted funding to use in operational expenses. Its 2019 budget was \$40 million; current year is nearly half of that amount, largely because the Gates Foundation, one of CCSSO’s primary funders, changed its allocation for the operational budget. The financial situation resulted in layoffs, planned attrition and voluntary turnover. CCSSO lost more than twenty-three positions from the summer of 2018 to the end of my residency, including two senior directors who departed the organization.

Member survey data from 2019 shows that CCSSO receives “best-in-class” ratings among professional membership organizations.<sup>4</sup> For three

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<sup>3</sup> Modern usage of “unicorn” has transformed from its roots as a mythical creature into “a singular and colorful metaphor for all those treasured—or fantasized—rarities that so often elude us” (Dictionary.com, 2020).

<sup>4</sup> See Appendix A for data

years, staff satisfaction was reflected in CCSSO's rank in the Top 50 Best Nonprofits to Work For: 37th in 2016; 27th in 2017; and 39th in 2018. In 2019 and 2020, CCSSO did not rank in the survey. Further, recent culture indicators point to areas of concern: CCSSO's staff survey data show a decline in several areas such as Culture and Communications, and Role Satisfaction.

### **The Strategic Challenge**

These factors reflect an organization undergoing change, both voluntary and involuntary. For CCSSO, its history as a membership organization gave it a narrow focus and stability for much of its existence. However, with the change of leadership from Gordon Ambach to Thomas Houlihan in 2001, it began a pivot to a broader role as an influencer of national and state education policy through federal advocacy and its technical assistance projects. That same year, Suellen Reed, Indiana's state superintendent, used her presidential address to focus members on the questions, "Can we do it all? And should we do it all? How do we prioritize our work?" (Richard, 2001). Nineteen years later, these questions still resonate. The retrenchment, staff changes, and emphasis on state education agencies (SEAs), after the Every Student Succeeds Act (ESSA), to implement federal educational programs create both a challenge to the older mission while offering an opportunity to refresh it.

### **Preview of findings**

Even though change is a constant in organizational life, many transformation initiatives fail. However, research shows that they stand a greater

chance of success when framed around small improvements rather than reifying their difficulties (Tasler, 2017). Could invitational storytelling with internal and external stakeholders be one of those frames? By making a space for people to collectively reflect upon the organization's identity and purpose (*who* and *why*) rather than just its function (*what* and *how*), could valuable insights for the strategic planning process emerge? This capstone argues that a storytelling process achieves both aims. In examining the linkage between identity, mission, vision, strategy, and communication, this project offers evidence for the proposition that storytelling is a container for the adaptive work of meeting the crises of retrenchment and staffing changes.

### **The Project**

Entering residency, I was initially part of the programming team responsible for operationalizing the presidential platform of Pennsylvania Secretary of Education Pedro Rivera. This experience uncovered the strategic possibilities for storytelling as well as its capacity to act as a holding environment for the adaptive work of defining the Council's identity and purpose. The financial challenges offered an opening to begin strategic work by leading the Executive Team to consider CCSSO's identity from the questions: What business are we in? Who are our clients? These questions were then modified for use with staff as an experience of organizational learning. The storytelling process described in this capstone supported a question for the practice of adaptive leadership within complex context undergoing challenge: Where to start? The experiment sought

to determine if a technical method of redesigning existing meetings as opportunities for staff to discuss questions could function as a high-leverage starting place for CCSSO's strategic planning. The project examines the theory that a collaborative process of identity construction and expression can inform an internal culture and communications strategy. Grounded in storytelling, articulated conceptions of mission, identity, and purpose are critical in strategic planning because together they fuel the *why* of needed change.

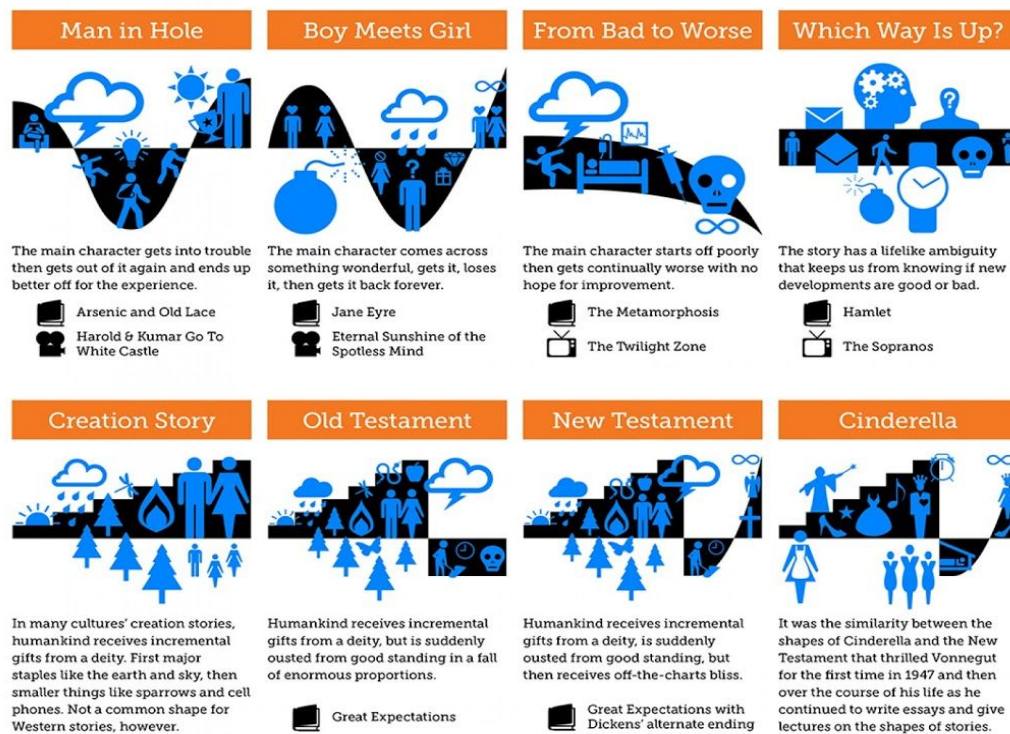
### **I. Review of Knowledge for Action**

Storytelling is a uniquely powerful and durable technology for creating change. In my background, disparate personal experiences cohere around a throughline of storytelling: as an English teacher, the 2015 National Teacher of the Year, former reporter, TED resident, and professional writer. These episodes synthesized in my mind, helping me think about the use of story as a multifunctional strategy for CCSSO.

Narrative in service of persuasion became an essential personal strategy for me during my service as the 2015 National Teacher of the Year (NTOY). For one year, the NTOY serves as a representative of American teaching to diverse audiences, domestic and international. In more than 300 events, I learned that story is irresistible as a place of commonality, even if it's being translated into Chinese for an auditorium of professors in Shanghai, or through the one-on-one Arabic translation in the Palestinian Territories, or into Quechua in Peruvian village schools.

Essentially, every story follows a basic structure, and as Kurt Vonnegut pointed out, they most often assume eight “shapes” or genres. In my residency, I found myself leaning on Vonnegut’s “which way is up” genre because it echoes my own uncertainty as well as the ambiguity and complexity in the organization.

**Figure 1 The Shapes of Stories**



(Open Culture, 2014)

At their core, stories are about change and they bind us together in the human search for meaning in life’s vagueness and indeterminacy. Stories create a vision, create cohesion, and help people feel safe in the cycles of change.

Story can be a powerful lever for systemic change because it highlights patterns and generates coherence and connection “across difference...to generate narratives that hold together groups, organizations, and movements...[enabling] very different people to discover their shared values and connect to each other as humans, rather than as professionals” (Saltmarshe, 2018).

In *Leading Minds: An Anatomy of Leadership*, Howard Gardner (1995) wrote: “[S]tories of identity—narratives that help individuals think about and feel who they are, where they come from, and where they are headed [constitute] the single most powerful weapon in the leader’s literary arsenal.”

### **Story as a Feature of Mission and Vision**

Mehta (2013) finds that “tropes and narratives” [have a] power that a story of sheer numbers would not have possessed” (p. 91). Further, In his article “The Causes and Consequences of Policy Paradigm Shifts,” he notes the power of story to influence “the climate of ideas at the broader level of public philosophies - such as whether the government is seen as the solution or the problem...[and] how the educational problem definition was reshaped” (p. 10).

In organizations, mission statements function as an identity marker and as a purpose story. How that story is understood and communicated impacts organizational sensemaking and communication, underscoring the need to reject simplistic transmission (e.g. “we’ll just repeat it until people get it”). Embracing an approach centered on group dialogue and discussion allows leaders to

authentically engage with employees in a mode that builds motivation and trust (Johansson, 2007; Berlan, 2016). The stories told by the people are a “folklore” that makes up an organization’s culture and influence its adaptability (Heifetz, Grashow, & Linsky, 2009).

### **Organizational learning**

In a conference with Dr. Carissa Moffat Miller, CCSSO’s Executive Director, she noted organizational learning as a needed shift within the team culture. My career as an educator, department chair, and central office administrator informed my preliminary design of an organizational learning experience for the strategic project. Much of my experience in schools used what Kotter (2002) describes in his principles of change management as well as what theorists might identify as organizational learning:

[A] learning organization must be grounded in three foundations (1) a culture based on transcendent human values of love, wonder, humility, and compassion; (2) a set of practices for generative conversation and coordinated action; and (3) a capacity to see and work with the flow of life in a system. Learning organizations are spaces for generative conversations and concerted action. In them language functions as a device for connection, invention, and coordination. People can talk from their hearts and connect with one another in the spirit of dialogue...When people talk and listen to each other this way, they create a field of alignment that produces tremendous power to invent new realities in conversation, and to bring about these new realities in action....Because of their commitment, openness, and ability to deal with complexity, people find security not in stability but in the dynamic equilibrium between holding on and letting go — holding on and letting go of beliefs, assumptions, and certainties...Developing such organizational capabilities will obviously require vision, patience, and courage.

(Kofman and Senge, 1995)

Experience with the adaptive work of helping teachers inside a Title I school collaborate in focused groups to examine problems of practice inspired my mix of narrative and inquiry as the project's animating force. Our workplace lab team at Harvard Graduate School of Education, in all phases of our consulting, committed to using the Meeting Wise method created by two of our professors who argue, "One of the most powerful practices in support of organizational learning is consistently having great meetings...in explicit service of the broader goal of improving the core work. When people will sit through a meeting in which they're being talked at for more than thirty minutes and not protest at all, that's evidence that there's a culture of acceptance of meetings as endurance activities rather than learning opportunities" (Boudett and City, 2014).

The method's intentional design served as a container for organizational learning in my facilitation of CCSSO's existing team meetings and repurposed them as research events. The Meeting Wise template also embeds principles of psychological safety, which aids the efficacy of corporate learning. Meeting adaptive challenges, organizational ambiguity, and external uncertainty requires what Edmondson (2019) calls an "underpinning" of psychological safety for teams to most effectively respond and perform.

**Table 1      How to Build & Support Psychological Safety in Teams**

| Descriptors                   | Specific behaviors                                                                                                                                                                                                         |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Demonstrate engagement</b> | <ul style="list-style-type: none"> <li>• Be present and focus on the conversation (e.g. monitor electronics use, like phones and laptops)</li> <li>• Ask questions with the intention of learning from the team</li> </ul> |

|                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                    | <ul style="list-style-type: none"> <li>• Interact and respond verbally (e.g. “That makes sense. Can you say more about...?”)</li> <li>• Be aware of nonverbals and their impact (e.g. eye contact, facial expression, leaning in)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Show understanding</b>                                          | <ul style="list-style-type: none"> <li>• Validate (“I understand...I can see how that would be hard..”)</li> <li>• Recap discussion &amp; check for understanding (“I heard you say...did I get that right?”)</li> <li>• Acknowledge areas of agreement &amp; disagreement</li> <li>• Avoid blame; focus on solutions (“What are possible next steps? What do you need?”)</li> </ul>                                                                                                                                                                                                                                                                                 |
| <b>Be inclusive in interpersonal settings</b>                      | <ul style="list-style-type: none"> <li>• Share information about work preferences; encourage others to do the same</li> <li>• Be available/approachable (e.g. make time for 1:1 conversation)</li> <li>• Express gratitude</li> <li>• Build rapport (e.g. ask about life outside of work)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Be inclusive in decision-making</b>                             | <ul style="list-style-type: none"> <li>• Ask for input, opinions, feedback</li> <li>• Step in when someone is interrupted to make sure they’re heard</li> <li>• Highlight when teammates were contributors to a success or decision</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Show confidence and conviction without appearing inflexible</b> | <ul style="list-style-type: none"> <li>• Manage discussion (e.g. don’t allow side conversations in team meetings; stop violations of norms and call it out if/when it happens)</li> <li>• Speak clearly and audibly</li> <li>• Share team’s work with others, give credit to teammates</li> <li>• Invite team to challenge your thinking and push back (e.g. “What am I missing? What are other thoughts?”)</li> <li>• Be willing to say, “I don’t know” when you don’t have an answer</li> <li>• Model vulnerability (e.g. don’t be afraid to discuss personal work challenges and failures)</li> <li>• Encourage risk-taking &amp; demonstrate your own</li> </ul> |

Adapted from Edmondson & Lei, 2014; Edmondson, 1999; and Goman, 2011

## **Mission and culture**

Harvard Business School Professor James Heskett links the shared values and behaviors in an organization to the health of its culture, which he defines as "how we do things around here." A mission supports the culture and helps to develop ownership of the organization's work as a "[foundation] for the successful implementation of whatever policies and practices are necessary to execute a given strategy." He advises companies to monitor the measurement of its results in terms of "employee retention and referrals, returns to labor [productivity], and relationships with customers (producing loyalty and customer "ownership"), as well as innovation and financial performance." He cautions against relying on only financial data to assess organizational health, arguing that these numbers are only a "rear view mirror" of the past. "The numbers that predict the future are the Four Rs: employee retention and referrals, returns to labor, and relationships with customers (exhibited by loyalty and ownership behaviors such as referrals). Once these numbers start to turn downward, it's time to reexamine organization values and behaviors, hiring practices, and other elements of the culture cycle" (Silverthorne, 2011).

## **Identity and Structure**

Structural dilemmas and tensions are resolved in agreeing upon a dominant conception of identity and purpose. Albert and Whetten (1985) defined organizational identity as "that which is central, distinctive, and enduring" about an organization. They note that organizational identity comes into question when

organizations face serious and difficult decisions like retrenchment. Moreover, organizational identity is an active concept and taking the time to examine and discuss it can help manage change. Young (2001) notes that organizations sometimes have to create a meta-identity to successfully integrate multiple purposes. He describes at least three possible identities for nonprofit associations that track with various CCSSO purposes:

1. **Goal-seeking systems:** the association coordinates to achieve common goals. CCSSO's equity commitments,<sup>5</sup> aimed at giving every student access to educational resources and academic rigor, is an example of its systemic operational goals.
2. **Economies:** the central organization determines what services it can supply in exchange for fees. In CCSSO's case, this might look like its collaborative convenings or leadership conference.
3. **The polity:** members represent SEAs and have similar interests but diverse approaches and priorities. A benefit of CCSSO membership is the forum to craft common positions, strategies, and collaborations, such as CCSSO's work in co-creating the Common Core State Standards. A polity identity and purpose engages discussion, facilitates common understandings and strategies, and executes collective action.

## **Mission As A Critical Lever in Strategic Planning**

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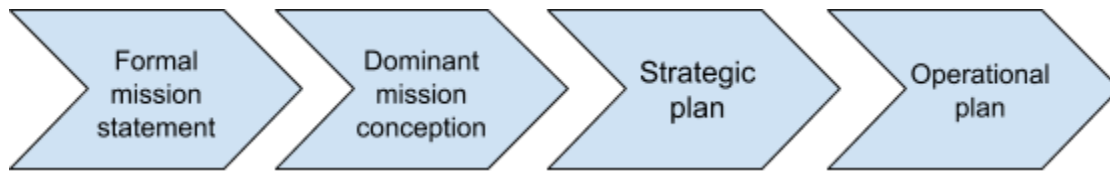
<sup>5</sup> *Leading For Equity: Opportunities for State Chiefs*, The Aspen Education & Society Program and the Council of Chief State School Officers. 2017. Washington, D.C. See Appendix B

Good mission statements have both an internal and an external purpose: Internally, they remind and inspire board and staff; externally, they attract people to the cause. In the nonprofit sector, purpose becomes paramount because organizations engage people “at the level of their deepest values and ask them to provide time and financial support for which the only return on investment is the knowledge of how they are making a difference” (Grace, McClellan, & Yankey, 2009).

Jonker and Meehan (2014) describe seven characteristics of a well-honed statement of mission as one that is: focused, solves unmet public needs, leverages special skills, guides trade-offs, inspires, and is inspired by, key stakeholders, anticipatory of change, and memorable. “A mission-driven organization with an ineffective mission statement will struggle to develop a durable theory of change and a useful logic model, it will deploy its resources inefficiently, and it will get distracted from its core purpose.”

Clarification and prioritization of goals can provide inspiration for the design of both strategic and operational plans. The practice of surfacing personal mission conceptions can be part of new board member orientations, staff or volunteer training, and message crafting for fundraising and external communications (Berlan, 2018).

**Figure 2 Flow of activities from mission to operation**



Basic nonprofit organizing ideas, from least to greatest specificity  
(Berlan, 2018)

Strategic management theory suggests that refining operational activities to enhance organizational capacity is part of mission and vision work. (De Vita, Fleming, et al, 2001). Because mission should ultimately define program development, decision making, policy setting, fundraising strategy, and all other related board actions, it is essential to have a common understanding of the mission. “With mission development and advancement, the process is as important as the product. Every strategic planning process should begin with a review of the mission” (Grace, McClellan, and Yankey, 2009).

The degree of organizational alignment around an understanding of mission and how it is embedded into procedures and practice is positively correlated with employee behavior and financial performance. “The concept of aligning everything that the organization does with its mission seems simple and obvious but is surprisingly difficult to execute. A causal review of any organization shows how many policies, procedures, and systems get in the way of the mission instead of keeping everyone focused on the goal” (Crotts, Dickson, & Ford, 2005).

## **Funding implications of mission**

A mission orientation for fundraising can be quite effective. “Ask for support because the organization meets needs, not because it has needs. Focus on uncovering shared values and building a long-term relationship, not just on asking for money” (Grace, McClellan, and Yankey, 2009).

External and internal pressures can cause mission creep in the absence of strong mission orientation. Jonker and Meehan (2014) explain that funders want to see their grantmaking reflected in the mission of the organizations, and that expectation can result in pressure to broaden the scope. “The price of saying no can be very high. But smart nonprofit leaders understand the cost of saying yes,” they advise. These researchers quote a former executive director who noted that some mission creep can come from internal stakeholders, “I call them ‘mission whores,’ and they are at work within most organizations [and] willing to ‘sell out’ by excessively broadening the scope of the mission in order to obtain funding or other advantages.”

## **Leadership Theory**

Heifetz (1994) describes the work of human systems as a continual need to resolve technical, adaptive — or a mix of both — challenges. Technical problems can be solved by experts using existing knowledge; adaptive problems require new learning and must be solved by the people experiencing them. Similarly, he distinguishes management (technical) from leadership (adaptive) and highlights the most common leadership failures in his research as those of

mistaking adaptive challenges for technical issues of management. To combat this tendency, he advises those wishing to be leaders to promote the resourcefulness of the people they serve and turn the work of finding solutions over to them while providing a holding environment, or community, for the challenges. Leadership for the strategic project is premised on the dual activities of creating the holding environment of team meetings to discuss mission, identity, values, and purpose, and then attempting to gain perspective from “the balcony” position of an outsider to consider the organization’s structures and their impact.

Adaptive work involves not only the assessment of reality but also the clarification of values. Heifetz says, “[Our] problems can only be diagnosed in light of our values. With different values, we screen reality for different information and put the facts together into a different picture. Leadership often requires pacing the work in an effort to prepare to undertake a hard task at a rate they can stand” (1994). And it’s dangerous. “If you do not take into consideration how difficult the learning will be, the organization or community will box you off as an outcast, impractical visionary, or worse. You may have to take baby steps” (Heifetz & Linsky, 2017).

### **Change Management**

As Frankl (2006) noted, the search for meaning is a basic human need and successfully meeting that need can act as a buffer for even the most chaotic shifts. This realization seems more pressing in the current business cycles of “downsizings, rightsizings, mergers, reengineering, telecommuting, and virtual

teams...[T]raditional boundaries in business and organizations are melting down. [Mission] can play a key role in providing a connection to a sense of purpose and meaning greater than oneself and can serve as a beacon of inspiration during times of change and disruption” (Levin, 2000).

Cohen and Kotter (2005), argue that a concrete business case for change is necessary, but not sufficient. Their experience as change management researchers supports a belief that people have to see and then feel the need to change. Part of this process is to make a space for people to name their emotions. “[L]eaders need to know where any fear, anger, or complacency might have built up within the organization, and these emotions must be addressed in the approach to change.”

### **Framework**

Structured storytelling and inquiry within the team meetings combine the multifocal work of organizational learning while building a sense of urgency for the needed strategic change of refreshing CCSSO’s mission and identity. Cohen and Kotter’s framework contains appeals to the rational and emotional tools of persuasion aimed at convincing the greatest number of actors within the organization of the need to thoughtfully examine its missional language, organizational identity, and purpose.

**Table 2      Increasing Urgency for Change**

| <b>Analysis - Think - Change</b> | <b>See - Feel - Change</b>         |
|----------------------------------|------------------------------------|
| 1. Information is gathered and   | 1. Help people see with situations |

|                                                                                                                                                                |                                                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| analyzed, reports are written, presentations are made about problems                                                                                           | created to help others visualize problems                                                                                                                        |
| <b><u>Outcomes</u></b>                                                                                                                                         | <b><u>Outcomes</u></b>                                                                                                                                           |
| 2. Information and analysis change people's thinking. Ideas inconsistent with the needed change are dropped or modified                                        | 2. Visualizations provide useful ideas that go beyond surface thinking. Deeper thinking and discussion add emotional resonance to power change                   |
| 3. <b>Gain rational buy-in</b> by making a case for change based on solid data which provides a sound basis for confronting problems and measuring performance | 3. <b>Gain emotional buy-in</b> by providing a compelling story that catches people's attention and generates a high level of energy throughout the organization |

(Cohen and Kotter, 2005)

### **Problem Statement**

In my assessment of CCSSO data and organizational research, the strategic project addresses a threefold problem: 1) multiple extant mission statements, and 2) internal culture and communications data and 3) staff turnover, which is harmful to the organization's internal coherence and ability to provide the expertise that ultimately fuels its mission.

### **Theory of Action**

**If** I lead stakeholders in thinking about CCSSO's purpose, how it accomplishes it, who it serves, and why it exists and

**if** I invite individual storytelling within team meetings embedding psychological safety mechanisms and in selected external interviews; and

**if** I share the evidence of these events,

**then** the internal adaptive challenges of culture and communications can begin to be resolved with an experience of organizational learning,

**so** that stakeholder engagement in the exploration of mission and identity informs the strategic plan and drives internal and external coherence in CCSSO's mission and vision.<sup>6</sup>

## **II. Description, Evidence, and Analysis**

### **Description**

As the organization's first Ed.L.D. resident, CCSSO granted me a systematic entry through programming work to operationalize Pennsylvania Secretary of Education Pedro Rivera's presidential platform. Conceived at the beginning of my residency and ending in November, 2019, this body of work focused on improving the conditions for learning in four broad areas: homelessness, food insecurity, mental and physical health, and wellness. Some of the work involved researching policy in service of updating a guide on improving the conditions for learning<sup>7</sup> and representing CCSSO at meetings with institutional partners such as the Centers for Disease Control, the Social-Emotional Academic Development (SEAD) policy table, and designing the breakout session at the Annual Policy Forum. That session, with the

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<sup>6</sup> See Appendix C for slide from team meeting presentation deck using a modified version of this theory of action

<sup>7</sup> See *Setting the Conditions for Learning: How State Leaders and Partners Can Work Together to Meet the Comprehensive Needs of Students*  
<https://ccsso.org/resource-library/setting-right-conditions-learning-how-state-leaders-and-partners-can-work-together>

Superintendent of Guam Department of Education, highlighted student voices and featured a fourth-grader from South Dakota and a high school senior from Georgia in conversation about the need for students to feel a sense belonging in classrooms.

This programmatic activity was invaluable learning for me. It illuminated a deep context for how the organization accomplishes its goals as well as surfaced evidence for its identity, mission, and organizational challenges. It helped me to build informal authority, trust, and allowed for the leadership experiences of “getting on the dance floor and the balcony.” The fertile nature of my residency and its multiple internal and external contexts gave me opportunities to attempt Heifetz’s metaphorical ideal of leadership perspectives: “When you move back and forth between balcony and dance floor, you can continually assess what is happening in your organization and take corrective midcourse action. If you perfect this skill, you might be able to do both simultaneously: keeping one eye on the events happening immediately around you and the other eye on the larger patterns and dynamics” (Heifetz, Grashow, and Linsky, 2009). Further, the presidential platform<sup>8</sup> work granted me a depth of knowledge in education policy that often felt like an extended doctoral studies class.

### **Towards Diagnosis**

As the end of the presidential platform work coincided with internal discussions about the strategic plan, Dr. Miller proposed that I undertake a part

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<sup>8</sup> See Appendix D for a short history of the presidential platform. Notably, Wisconsin State Superintendent, Tony Evers’ platform initiated CCSSO’s focus on equity and produced influential SEA guidance.

of that process in November. Research for insight into the context for, and past work on the strategic plan, uncovered an opportunity to refresh CCSSO’s mission and core values through addressing the three versions of the mission statement appearing in external and internal documents.

**Figure 3 Screenshot of CCSSO website landing page**



Note: The orange “Read Our Mission” button was inoperable

**Figure 4 Screenshot of CCSSO website’s “About” tab**

As an organization, we are committed to ensuring that all students participating in our public education system -- regardless of background -- graduate prepared for college, careers, and life. To realize this, CCSSO brings together dedicated leaders and exceptional ideas to achieve measurable progress for every student.

CCSSO’s Guidestar listing offers yet another rendering of the mission statement. “The Council's Mission: CCSSO, through leadership, advocacy, and

service, assists chief state school officers and their organizations in achieving the vision of an American education system that enables all children to succeed in school, work, and life” (February 5, 2020).

Additionally, the core values<sup>9</sup> date to 2017, and can be accessed only on the CCSSO intranet in an undated document; and the organization’s vision statement appears only on its bylaws, which are largely unseen by most except board members. This became evidence for the case memo I created for the executive leadership team.<sup>10</sup>

An expressed theory of action was missing; in the case memo, I proposed that CCSSO’s organizational activities suggest that its current theory of action positions state education agencies (SEAs) as the unit of educational change: *If we support and advise SEAs in their oversight and guidance of local education agencies (LEAs), then we can effect system change at multiple levels, help create the conditions in districts and schools that lead to equitable opportunities, and advise the strategic allocation of resources to advance equity for all children.*

Like all of CCSSO’s publications, the existing strategic plan is detailed, yet crisp. It describes six goals and 26 related strategies.<sup>11</sup> Beyond describing strategic strands, the plan’s goal descriptors reified themselves in the staff, sorting them into teams, and serving as identity markers. For example, when introduced, staff informed me they were a member of “Goal Team X”; when

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<sup>9</sup> Delineated on the document as “kids, collective impact, service to chiefs, accountability, and educational equity”

<sup>10</sup> See Appendix E for the case memo

<sup>11</sup> See Appendix F for a truncated copy of the strategic plan

asked their team's function, they repeated the description from the plan associated with the decimal point in the team's associated strategy (e.g. 2.1 "Manage transitions into K-12").

Taken as a whole, the strategic plan reads as less of a big picture strategy than an operationalization plan, detailing as it does the specific work of siloed teams and directives to SEAs. In practice, the strategic plan is, in the words of an operational staff member, "a strategy for how to plan for programming."

To speed the work of fundraising and meet budget projections, a consulting firm had in August, 2019 begun an effort to create a marketing and funder engagement plan for the development officer's team. A slide provided to me from the consultant's presentation to leadership shows an attempt to blend an existing mission statement with a rough theory of change: "We are committed to ensuring that all students participating in our public education system — regardless of background — graduate prepared for college, careers, and life. We believe Chiefs are the catalyze [sic] for achieving this goal."

The evidence from turnover data and role/culture data in the most recent "Best Nonprofits" survey, conversations with leaders in other nonprofits in the ecosystem, informal and confidential conversation with current and former staff (and in particular those actively planning to leave), and the responses to the hopes/fears and plus/delta invitation for feedback, I began a root cause analysis of the downward trend in staff satisfaction. My goal was to provide a solution that would:

- cast the widest net in the organization and involve the most people
- address communication and culture needs
- offer the lowest bar/highest potential entry for an experience of organizational learning/adaptive work designed with psychological safety
- operationalize equity of voice
- help staff to link the strategic planning to the mission, and then connect both to their own motivation for the work they each do

This is the context and the rationale for the strategic project I began to imagine: a refresh of the mission and vision statement informed by all staff and selected external stakeholders through individual storytelling. My deliverable was initially conceived as a finalized mission statement, vision statement, and introduction for a new strategic plan. Dr. Miller and I devised the project as a way for the staff to experience organizational learning informed by concepts of psychological safety, as well as co-creation of the final mission and vision. Being intentional in this project, Dr. Miller told the staff in the internal newsletter, was permission for everyone to value quality over deadlines.

#### Timeline:

December-February: Conduct interviews and team meetings

Present findings to Executive Team: March 2nd

Present findings/lead mission workshop for staff: March 12th

Present findings to board: March 22

## Design of the strategic project

1. Use standing team meetings as a container for adaptive work and embed psychological safety practices using a modified Meeting Wise template.

Using a consent agenda, I solicited questions or other input team members might want to add in advance of the meeting. The slide deck, a copy of the strategic memo, evidence of our varied mission statements, and examples of mission statements from our partners were provided in advance. Pre-work requested participants to prepare an answer for the question: **What is a mission statement from an organization you either admire or worked for in the past?**<sup>12</sup>

2. Storytelling from participants in answer to the invitation: **When your family or friends ask you what CCSSO is, what do you tell them?**

From resulting conversations, note language describing individual conceptions of mission and identity, code for internal and external responders, and note patterns of concepts, terms, and repeated words. End with an invitation to share anonymous feedback in the form of plus/deltas or hopes/fears. Use these responses as a process check to plan the final presentation to staff.

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<sup>12</sup> See Appendix G for Structured Storytelling Meeting Artifacts

3. Advise agenda for vision process with an all-staff meeting. Prepare drafts of responses ready for commentary and edits. Following this meeting, use these responses to prepare a working draft of a refreshed mission statement.
4. Final deliverable of draft mission statement refreshed and draft introduction/preface for new strategic plan.

### **Evidence**

Each team meeting concluded with anonymous feedback on the process and project; participants chose whether to submit them as plus/deltas or as hopes/fears.<sup>13</sup> The data for the project was gathered using a mix of qualitative and quantitative methods. All responses were anonymous by design to maximize authentic and open reflection. They are reported without names and coded only as internal or external respondents. Selected quotes, distinguished by I for internal or E for external interview, are further anonymized with a number. I conducted thirty-four storytelling interviews: twenty-seven interviews with internal staff, three with board members, and four with external partners.

Evidence collected from interviews is reported in tables of specific quotes using descriptors of mission and identity in the appendices. The quotes in tables were matched with missional language used in public-facing documents and then both text sets were analyzed for word frequency. I compared these responses

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<sup>13</sup> See Appendix H

with versions of the existing mission statement, the organization's certificate of incorporation, its IRS Form 990, and the most recent copy of its bylaws for evidence of its external descriptors of mission.<sup>14</sup>

The most frequent words signal the broadest alignment with conceptions of identity and mission and may be used to inform CCSSO's refresh of its mission and ongoing strategic planning

### **Analysis**

Storytelling is becoming a cliched term in business, particularly as it is conflated with marketing, funding justifications, or campaigns showcasing corporate social responsibility. These less-appealing associations influenced the design of the project around questions rather than overtly framing it as an invitation to "tell a story." The question structure offered the easiest engagement with a mission task because of its open-ended construction and preference for personal answers. Anyone could answer in a way that informed identity and purpose while implicitly reminding the teller of what they valued in the organization. A byproduct of the process, when done in teams, was its capacity to bond members in shared experiences of pride in their work, and humorous anecdotes about explaining who and what CCSSO is to family and friends.

### **Narrative Vignettes Using Vonnegut's Story Shapes As Categories**

Vonnegut's story shapes became a framing device for me as I interpreted the patterns of narrative responses. As an English teacher seeking to make

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<sup>14</sup> See Appendix I

meaning of organizational culture, I found that the stories I heard at CCSSO supported Vonnegut's contention that "the shape of a given society's stories is at least as interesting as the shape of its pots or spearheads" (1981, p. 285). Data science researchers in the Computational Story Lab at the University of Vermont tested this idea by quantifying the shapes, creating a tool to measure word shifts associated with emotional states, and then analyzing more than a thousand tales in the Project Gutenberg Archive. Using this as a sorting mechanism, they found support for six basic story shapes to describe a range of "emotional trajectories." Further, they found that "the success of the stories underlying these emotional arcs suggests that .. emotional experience strongly affects how stories are shared" (Reagan, Mitchell, et al, 2016). This helped me to match the stories as patterns of type and as arcs of emotional experience.

The staff's stories, when viewed through this matrix of shape and emotional trajectory, helped me to understand each narrative's particular significance for the teller. Moreover, these patterns gave me perspective on the organizational culture and a grasp of staff involvement in strategic planning. The most prevalent arcs and shapes were "Creation Story," "Cinderella," and "Man In Hole." Each gave me different perspectives on identity formation, history of strategic planning, and staff's personal conception of CCSSO's mission.

### **Creation Story Frame**

Two veteran staff members used the opportunity of the interview to tell a "creation story" of the organization's beginnings and early leaders. Vonnegut

describes this particular genre as being marked by the appearance of a deity who bestows gifts over time. This frame seemed to fit with the narratives about Gordon Ambach, CCSSO's Executive Director from 1987 to 2001.

"Ambach, he knew what he wanted, that's for sure. He had all the ideas in his head. You didn't approach him, he called you in," a staff member who worked at CCSSO during Ambach's tenure remembered. "He's the one who moved us to this building on Capitol Hill so he could be close to the people he needed to influence. He set up his office where it was his inner sanctum so he could schedule thinking time. In his office, he had an oil painting of himself in robes, like a king. It was something. I think it was from when he was chief in New York, but it looked like it came out of a castle. It was intimidating to try to talk to him and that's how he wanted it because he didn't like disturbances. You made an appointment to see him. The man was a genius and I respected that, but he was not someone who wanted to interact with the people who worked for him."

Another staff member echoed this description and I formed a sense of Ambach as a leader firmly rooted in the school of formal strategic management and prescriptive processes "more concerned with how strategies *should* be formulated than with how they necessarily *do* form" (Mintzberg, Ahlstrand, & Lampel, 1998). In these tellings, Ambach alone possessed the power to name the mission, conceive of the strategy and order its execution.

Ambach's successors, Thomas Houlihan (2001-2006), and Gene Wilhoit (2006-2013), factored into creation narratives about the iterations of the mission

and strategic plan. “Houlihan hired a big consulting firm to do a whole vision process and a mission and write a strategic plan. That’s the first time I remember that we all came together to think about our identity,” another staff member told me. “We got the big grant money from Gates and [Houlihan] used part to do that kind of work of thinking about what kind of business we were in. Gene helped us start to think of ourselves as serving both the chiefs and also being influencers of education policy, of being both a membership organization and a nonprofit.”

The language used to describe these former executives helped me to understand the iterations of the organization’s mission and identity. Like an origin story, the characters and actions explained how and why the strategic planning moved from being largely centered in a central figure to a process that sought to engage staff in its operation. Notably, when staff talked about the executive directors, they were consistently formal and informal when identifying them, which further illuminated for me how the staff both related to them and experienced their leadership. Ambach and Houlihan were referred to by their last names, underscoring their exalted and imperial status; the most recent executive directors were referred to familiarly as Gene, Chris (Minnich), and Carissa (Moffat Miller), emphasizing the staff’s perception of them as approachable and collegial.

### **Cinderella Frame**

Another pattern of responses fell within the shape Vonnegut called the “Cinderella frame,” so named for the common story known to many cultures. It

describes a redemptive plot in three acts that begins with an improvement in the main character's situation accompanied by gifts, a reversal of fortune, and a restoration of what was lost, plus even better gifts added to even better circumstances. Data scientists simplified the Cinderella shape as a wave rendered *rise-fall-rise* (Reagan, Mitchell, et al, 2016). This story type is related to the creation story type because, as Vonnegut argued, its beginning “[looks] like the creation myth of virtually every society on earth... the rise to bliss at the end was identical with the expectation of redemption as expressed in primitive Christianity.” He says it is a story “of which Americans never seem to tire [because it] is about a person who becomes happier on finding something he or she likes a lot. The person loses whatever it is, and then gets it back forever” (p. 287).

This arc was prompted by the invitation to share a mission statement from an organization where they had worked previously or from an organization they admired. It elicited narratives from newer staff to describe their involvement in organizations before they came to CCSSO. These staff members became more animated as they talked, the prompt seeming to work as a filter to evoke memories. They often spoke of their attraction to aspirational themes embedded in these former missions and the mission's personal resonance for them as people motivated to do good work to help make the world a better place. As a narrative technology, it allowed them to create a comparison between their past selves and the selves that were motivated to join the work at CCSSO. In their

accounts of these mission statements, most interviewees alluded to a sense of dissatisfaction with the experience of what felt like a mismatch between the espoused visions of their former organizations and the limited impact they felt they were able to achieve. This was most apparent among the staff who identified themselves as former members of Teach For America, all of whom could recite the TFA mission statement from memory.

“You have to hand it to [TFA] for finding a way to get everyone on board with the same goals,” an interviewee said. “People joked about drinking the TFA Kool-Aid, but at the end of the day, it allowed you to see how you fit into those goals.” Another TFA alumnus agreed, citing the vision statement encapsulated in the phrase, “one day.”

“It was even a hashtag and yes, people made fun of it. We texted each other things like ‘one day we will be treated as human beings,’ but we also knew that it was a big aspirational goal for a reason.”

Still another credited their experience as one of being converted to the idea of mission as a way of approaching the organization’s work. “They had a method of instilling vision and mission that permeated everything. When I think of how a mission and vision should work, that’s what I rely on. That’s the picture in my head.”

Those conceptions seemed to shape how they viewed an organizational mission as being both an aspiration and a guide for daily work. However, each was ultimately disappointed with the limited sphere of influence afforded by their

former assignments as well as the difficulty of working in schools facing structural challenges like racism and poverty. This was seen as a failing of TFA but an opportunity at CCSSO because of its ability to work within government to effect change.

“One of the things that made me want to work for CCSSO is the focus on equity and how what we do to help states works to help kids like the ones I taught,” a staff member told me. Similar rationales for coming to CCSSO repeated among staff members in different teams, helping me to understand them as a redemptive pattern, insofar as they felt that their pursuit of equity had been more fully realized in their work at CCSSO. When viewed with the Cinderella frame, I found that the stories of their previous positions explained their attraction to work imbued with mission, vision, and a dedication to aspirational goals. Further, it helped me form an understanding of their belief that at CCSSO they would have access to the levers of change unavailable to them as teachers or administrators in other roles at socially responsible nonprofits. In this view, CCSSO provided them with the “gifts” of power to convene decision-makers, equip influencers, and shape how policy is made so they could in turn affect the lives of children in schools.

### **Man In Hole Frame**

Vonnegut explains the enduring cultural influence of the “man in hole” genre as being connected to its structure as a blueprint for personal development and upward mobility. In a 2004 lecture, he outlined the wave of movement for this

type, telling the audience, “If you stay home and watch this on television, it’ll be told again, and again, and again, and nobody ever gets tired of this story. I call it ‘man in a hole,’ but it needn’t be about a man in a hole. Somebody gets into trouble, gets out of it again. The ending is a little higher than when we began because the reader thinks, ‘well by God, I’m a human being, too. I must have that much in reserve if I get into trouble or whatever” (Case Western Reserve University, 2016). This particular frame is one of the most popular in books and films, according to the findings from the University of Vermont research team, which they rendered as *fall-rise* and ascribed to, for example, *Harry Potter and the Deathly Hallows* to identify the shape for general audiences (Reagan, Mitchell, et al, 2016).

All of the external interviews fit this form in their descriptions of the personal benefit or partnership they gained to help them meet the demands of governance, management, and policy decisions inherent in our modern education system. Those seeking to lead or influence the sector face complex cultural, political, and economic factors that work together to create multiple dilemmas - or what Vonnegut might describe as ‘holes’ - that they must navigate. Increasing public expectations for student achievement in an era of profound economic inequality, inadequate funding, and the diversity of student needs intensifies the stress on the education ecosystem and its leaders. A study of superintendents found just these factors to be their most vexing issues (Trevino,

Braley, Brown, & Slate, 2008). Though the study focused on district superintendents, the same issues exist at the state level.

The way through these stressors, the state chiefs said, came from the specific solutions that emerged in the formal and informal conversations they joined during CCSSO conferences. Developing their own leadership skills to face these stressors was a repeated theme among board members.

External interviews repeatedly cited the power of CCSSO's network of system-level leaders for its ability to offer resourcefulness, strength, and stability to members and partners. "Chiefs and deputies need that network and that influence. They need the ideas that only happen when everyone is in the room. Especially in a world of constant turnover, [CCSSO] is stability," a longtime organizational partner said.

"The dedication to improving the functional leadership in state education agencies is far and away the most important work they [CCSSO] do, and it goes beyond just chiefs. Including experts in so many different policy and advocacy areas is key" a state chief said. "That's what ultimately drives improvement."

A board member spoke to the difficulty and isolation inherent in the role of state superintendent of education and how the organization's ability to bring together a cohort of peers was a vital asset of membership. "When I first became a chief, I leaned on what I learned from other chiefs and so many of the resources [at CCSSO]. No one understands this role unless they've been in it and no one can really help you like those who have been in the role. To have all

of those folks in the room, to be able to learn from them is such a gift. To get time to talk, to share ideas — there's no other place I can find that."

Echoing these ideas, another board member spoke of the chief cohort's ability to help each other focus on the deepest purposes of their work.

"We are able to come together around a common purpose and speak with one voice and that's powerful right now. The organization guides and provides a framework for the work of state chiefs. There's no comparison — in terms of the support and the framework — that any other organization offers. In our jobs, it's really easy to lose sight of kids, but CCSSO keeps equity and kids at the forefront and brings it back to kids in the mission."

Key components and relationships among these stories created a context of authenticity, engaged both the head and the heart of those involved, affirmed the experiences of, and built trust among the storytellers. Most importantly for CCSSO, the interviews provided insights for the strategic objectives of mission clarity and organizational identity and culture, while providing evidence of the organization's value for internal and external stakeholders.

The external interviews reminded me of the exceptional learning I found among a cohort of peers in the Ed.L.D. program and underscored the project's aims of facilitating purposeful gatherings to invite stories. Time to talk to those with whom we share similar roles and responsibilities helps us cope. This kind of conversation quickly bonded participants in a way that helped to create new thinking, normalize struggle, and validate its attendant emotions. Focused

conversation synthesizes all of the unconscious learning and produces the same sense of epiphany that the novelist E.M. Forster captured when he said, “How can I tell what I think till I see what I say?” (1927, p.101). This is a need we don’t know we have until we experience it — especially as it helps us make better decisions and find productive ways out of whatever hole we find ourselves in. These structured storytelling meetings reminded me of the power of questions to excavate our various intelligences in service of each other’s challenges. In this way, the questions elicit the stories that can work as a text to help each other manage the adaptive challenges and exponential complexity inherent in the work of educational systems level leadership.

But this only happens when we are intentional about how and why we gather. I learned new things about my CCSSO colleagues, some of whom I’ve known for years. No matter our company, we have the power to make these epiphanies and connections a regular feature of our work lives. We have the power to make our meetings more focused, intentional, psychologically safe, invitational, and useful. This is, in my final analysis, the work that people want to create and support.

### **Expectation Versus Reality**

My plan was to report these findings across teams in an all-staff meeting designed as an interactive workshop functioning as a double loop on the previous learning from the invitational storytelling.<sup>15</sup> Designed as a guided inquiry

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<sup>15</sup> Single and double loop learning is simplified in Argyris, C. (1994). “Good Communication That Blocks Learning” in Harvard Business Review

session, the workshop would allow for discussion of the evidence and how it might inform a refreshed vision using the questions:

- What change is needed?
- What should not be altered?
- What is our vision?
- What is the best way to make the vision a reality?
- What change strategies do not feel safe to try?

(Adapted from Cohen & Kotter, 2005)

The final part of the project involved sharing the findings with the board as both an update and as a source of information, framed as inspiration for strategic planning work. These last two project activities were not completed because of two particular, unanticipated events: the COVID-19 pandemic and the death of my grandmother, who was all-important in my life.

A brief timeline shows the speed of these impacts:

- January 31 - U.S. Department of Health and Human Services declares public health emergency (HHS Press Office, 2020)
- February 29 - first U.S. coronavirus death; high-level travel restrictions announced (Baker, Crowley, et al, 2020)
- March 2 check-in with Dr. Miller, COVID-19 causing multiple cancellations affecting organization; in-person board meeting transitions to virtual

- March 4: COVID-19 response becomes meeting focus, necessitating the cancellation of my presentation. Board meeting will likewise change its agenda
- March 9 -full-time telework; office closed
- March 11, D.C. Mayor Muriel Bowser declares public health emergency, cancels gatherings over 50 people (Office of the Mayor, 2020)
- March 13, hospice alerts my family to gather for last communications; March 17, return to Texas
- March 21, my grandmother died
- March 24, Mayor Bowser closes all non-essential businesses through April 24th (Recker, 2020) making a return to in-person work impossible.

### **Analysis of the Residency Experience**

The circumstances of my entry into residency created conditions that heightened uncertainty for both me and the organization, which created constraints for this strategic project before I was able to grasp their impact. Additionally, given that I was CCSSO's first Ed.L.D. resident, I noticed a similarity between being the first Ed.L.D. resident to being the first child in a family. The "first" is often, as my own mother labeled my position as firstborn, the "trainer model." This is not meant disrespectfully but offered as a realization that being the first requires lots of grace, patience, and understanding on both sides of the relationship.

From 2015, I have been fortunate to have had an exceptional relationship and history with CCSSO as its NTOY and later as a facilitator of professional development for four successive cohorts of state teachers of the year. This is the central reason I pursued residency with CCSSO and not another organization. As NTOY, I respected, but had only a dim understanding of its policy, advocacy, and membership work. The other reason I wanted a residency at CCSSO is because I wanted to apprentice a female leader — especially one who had made history in an organization. Dr. Miller is the organization's first female Executive Director. Most of my work with her previous to the residency was as the Council's Deputy Director. I was aware that she inherited a thorny set of challenges and was interested in learning from her how she has navigated solutions given the knife's-edge margin for error afforded to most women in leadership. Residency would allow me, I believed, to gain important mentorship and address serious gaps in my understanding of these roles as well as more fully grasp nonprofit leadership. I'm grateful for her willingness to extend so much of her time and to be so open in the many check-ins we were able to have.

With certain members of the staff, I found that my NTOY history created an identity for me that affected how my strategic project would be executed and what it would be about — at least at the beginning. When conversation about the outline of my strategic project began, it took place in January during a break in the convening activities of the 2019 cohort at Google's headquarters in Palo Alto. Google is a major sponsor of the NTOY program and its hosting allowed for help

in visiting schools exemplifying Secretary Rivera's platform. This is more germane to my project than it first appears because it set conditions that I didn't question at the time. I didn't know enough to ask questions, which meant that I began this part of my relationship with CCSSO with many assumptions, not the least of which was an assumption on my part that I would work more closely with Secretary Rivera than I did. Therefore, I didn't think through how the terms of my initial project set me as adjunct to the work of enacting another's project, one that was also wrestling with its own goals, strategies, and activities.

Consequently, this meant that when my first CCSSO supervisor was laid off only days before I began my formal residency, his leaving triggered two more consequences that came to affect my strategic project. Because he had attended the on-campus residency launch, my first supervisor and I shared a common understanding of the residency's purpose; his leaving meant that this understanding left with him. Therefore, the remaining constant was the thread of the work with Secretary Rivera's platform, which meant that my position followed that workstream within the organization. My supervisor became the presidential project director and my mentor became the senior director of that team responsible for the work. In hindsight, this would have been the appropriate time to renegotiate the role.

The blur of events at entry obscured the hierarchy for me within the organization, which was another area where I should have developed both my own and leadership's understanding at the beginning of my residency. It was only

in conference with HGSE's residential office and my advisor that I realized the importance of the organizational chart to how I would be able to move work within CCSSO. Where I was currently sitting, three levels below the cabinet, was within a program team focused on existing, specific work in student transitions and the presidential platform. This work did not affect the strategic direction of the wider organization and did not allow for access to, or understanding of, the work of senior leadership or the executive cabinet.

After sharing this new awareness with my second supervisor, I requested that the team's director attend the fall Return to Campus Visit and be reclassified as my supervisor. I was too tentative and operating from my previous NTOY identity rather than as a Harvard resident, I realize, which cost me time and credibility as a strategic advisor. However, I'm grateful to both of the women on the student-centered learning team for not only giving me opportunities for interesting work, but also to be so willing to help reset my residency.

As she listened to the roles of my cohort and looked around at their guests during the Fall Return to Campus meeting, my newest supervisor leaned over and said, "I had no idea that [Superintendent] and [Executive Director] were the kinds of people who are supervisors for this kind of work. I don't sit at the proper place in the org chart compared to them, and I'm not the proper person to supervise you. You need [Dr. Miller] as your supervisor. We need to have your position changed." Thanks to discussions with her and Dr. Miller, I was able to gain Dr. Miller as my supervisor and the opportunity to create my own project.

The impacts of these conditions were threefold. My original project with Secretary Rivera, ending at the end of September, had months of work invested in it, and inspired the capstone's first draft. However, it became clear, through committee feedback, that the draft was more of a messy narrative in search of focus rather than the description of an original project that would help the organization with strategic goals. Focusing on that work kept me so engaged that I didn't give myself much time to reflect. I realized the presidential platform work also created hierarchical confusion because by this point, four separate CCSSO staff had devoted time to overseeing my work. This affected my sense of being mentored or gaining a leadership throughline, which also affected my authorizing environment. While I had informal authority through NTOY history and relationships, an original strategic project required formal authority. With Dr. Miller as my supervisor, I gained both thought partnership as well as the formal authority for a new project. Original and exciting, this newer work was designed to be strategic at the executive level. Because it was beginning in November, it had to accelerate immediately.

This acceleration affected the project's size, scope, and delivery system. In revisiting my theory of action, I realize that it was too aggressive. For instance, a goal of internal and external coherence and communication was outside the scope of my project and a more achievable target is to aim for shared understanding of mission and identity. Heifetz, as noted earlier in this paper, repeatedly stresses the need for adaptive work to be shared with the people

impacted by its challenges, and that it is often small and incremental by necessity. It was difficult to find a strategic project lever that would meet the conditions of being adaptive and distributed. Adding in a goal for organizational learning served to make it even more ambitious, especially if it was to meet Senge's definition of it. Finally, aiming for cultural change is, I understand, a responsive, ongoing practice informed by the people who create the culture. When that culture is undergoing the amount of disruption that CCSSO is experiencing, it would benefit from having a director of learning to design continuing, embedded, and customized opportunities for change management, which I will argue for in more depth in the implications for the site.

Most of the theory of action survived through the project because it was constrained to the design of meetings as intentional vehicles for change management, feedback, and communication using a prompt to invite stories bounded by protocols. Using standing meetings allowed for minimal disruption and honored staff's energy in such a way, to use Heifetz's metaphor, that the temperature for the work was kept within a productive range (Heifetz, Grashow, and Linsky, 2009). Therefore, a revision would read as:

If I lead stakeholders in thinking about CCSSO's purpose, how it accomplishes it, who it serves, and why it exists and

if I invite individual storytelling within team meetings embedding psychological safety mechanisms and in selected external interviews;

**then** the experience will function as an organizational learning container for the adaptive work of refreshing the organization's mission and identity

**so** that the work is distributed among stakeholders in a way that supports shared understanding to inform the strategic planning process.

A further aspect of project post-mortem is helped by revisiting Cohen and Kotter's framework since it influenced my decision to provide two kinds of evidence — what they might term “analyzing/thinking” (quantitative) and “seeing/feeling” (qualitative) data. Complications from the COVID-19 pandemic prevented the final activities and analysis, but most of the project's goals were accomplished. The outcomes are grounded in persuasive evidence targeting the “head” and “heart” modes to make a case for the needed change in the mission. Further, by the nature of its open-ended construction and anonymity, the response patterns are authentic in a way that numerical data or statistics are not. When planning for changes that involve mission, vision, or similar purpose-driven work, I would argue that this kind of data is more useful for change management because individuals can see their own thoughts and feelings reflected in the responses. Moreover, this kind of evidence measures culture in a form that is more beneficial for organizational learning than Likert-scale scores of agreement because it is personal, narrative, and experiential. Framed this way, narrative evidence assumes an audience that responds. Consequently, people feel part of the solution and are much more likely to support what they create.

Cohen and Kotter (2005) note that leaders often skip the need to make a case for change or increase the urgency for change because most believe making a business case for change is all that's needed. This is necessary but not sufficient. Behavioral change is much more difficult and requires finding and addressing fear, anger, and apathy so it can be converted into urgency. Likewise, leaders should consider the "emotional reality" hidden inside of daily work. This data, Goleman, et al (2013) argues, often shows up in turnover. They cite research showing that turnover of key staff can hamper an organization for up to three years. Because of this, I designed the project with the potential to test for an "emotional reality" by soliciting responses tied to questions, pluses and deltas, hopes and fears. For CCSSO, an organization reliant on staff with a rare blend of content expertise and high emotional intelligence, the turnover numbers concerned me. Not only do those experts take their brains with them when they leave, they take their network relationships with them as well, which dims connections across the educational ecosystem that feeds CCSSO's collaborations and partnerships.

Granted, this is an assumption. Reflecting on all my assumptions embedded in my residency and strategic project, I found I could list them as well as match them to the literature that fed them:

1. People are the most valuable asset of the organization; their expertise is the engine for the mission (Bolman and Deal, 2017)

2. People support what they create. Shared creation and shared mission is a key driver of effective implementation of the strategic plan (Lencioni, 2012; Senge, 1990; Vogt, 2009; Wheatley and Rogers, 1998)
3. Culture and climate are powerful drivers of organizational effectiveness; those lower scores and turnover type and numbers are a serious indicator of potential trouble (The Nonprofit Center, 2017; Kacmar, Andrews, et al, 2006)
4. All change causes an equal and opposite reaction — Kegan and Lahey (2009) would call it an *immunity* to change — that may show up in various behaviors like avoidance, reactivity, and other maladaptive responses. This might explain what I’m seeing and feeling in the organization.
5. Shared language is important in leading adaptive change, and dialogue uncovers problems in an invitational and engaging manner that honors staff expertise (Heifetz, et al, 2009; Senge, 1990; Kegan, Lahey, et al, 2016)
6. The framework from Kotter’s *The Heart of Change* would be applicable to this situation and the organization will accept it if it’s deployed at a speed that “[disappoints] people at a pace they can absorb” (Heifetz and Linsky, 2017, p. 142).
7. Mission alignment and a visioning workshop will act as technical processes to address the adaptive challenges of positively affecting culture while offering insight for strategic planning. In this way, I can “serve

two masters” by providing value for both leadership and staff (Heifetz, 1994)

8. People want and need the experience of small wins in community because it helps mitigate threats to status, certainty, autonomy, relatedness, and fairness (Rock and Cox, 2012)
9. Conversation and storytelling are ancient human technologies for facing reality, coping with the politics of change, and finding and using local resources to solve local problems (Ganz, 2011, Mehta, 2013, Mapp, et al, 2017; Vonnegut, 2014; Wheatley, 2009; 2010; 2017).

### **Organizational Learning**

As noted, CCSSO’s existing strategic plan is a model of its well-honed ability to organize for execution. However, as Dr. Miller has noted several times, it’s critical that CCSSO develop an equal facility with organizing to learn. Edmondson (2008) deepens this idea and explains how a preference for “relentless execution” of organizational goods and services dominates American business culture. Her main argument is one of using learning as a competitive advantage in business and ties it to her previous research on psychological safety. She describes two modes of “getting things done” — efficiency versus learning — as being in basic tension with each other in most workplaces. She distinguishes two modes by the amount of fear necessary to support their respective leadership behaviors. When efficiency is the value, leaders provide the answers, issue corrective feedback, and employees follow preordained

processes and fear the consequences of noncompliance. When learning is centered, leaders organize work from a mission perspective, encourage team processes of problem solving, and normalize feedback as a two-way continual process of improvement; fear is seen as a powerful limiting force in this system.

My implicit goal was to influence the leadership to see the need for adaptive work and to provide a workable structure for CCSSO to use beyond my residency. If this were successful, I believed, it would have the potential to create real value for leadership and staff as a useful container for learning. In this sense, the progress CCSSO made in analyzing its mission and identity in such a short time was tied to my leadership of the project's personalized, embedded process of storytelling. Successful activities for this goal include the structure and design of meetings, and the met goal of leading the majority of staff in structured thinking about purpose. The project had mixed success in meeting the goal of buy-in, either rational or emotional, because of limited ability to access deeper learning or iterate with other structures (e.g. constructivist listening, consultancy protocols) or facilitate a final workshop with the staff to process the findings.

If I view my leadership through an adaptive lens of going beyond what was expected of me, of risking relationships, and being willing to risk being misunderstood as I asked people to go into the unfamiliar territory of focused conversation around mission and identity as an entry into strategic planning, of introducing shared language and concepts like the technical/adaptive lens, then I was a successful leader.

Failures included a limited amount of reflection from either myself or the executive and leadership teams about these meetings coupled with a lack of discussion about how they might be embedded into future work. A limit of the project's design became apparent in virtual meetings. Distance worked against the storytelling structure because of buffering delays and the inability to gauge nonverbal behavior to gain insight or feedback from it. Finally, there was no plan for continued practice. I didn't realize until too late how I could have involved the Equity Team and Human Resources in planning for possible follow-up experiences. All of this worked against creating the sense of urgency needed to support and power the adaptation to new realities of organizational resources and structures. Time is always a factor and so is the difficulty of mixing technical and adaptive methods to address problems within the residency's limited scope and timeframe.

Politically, I didn't fully understand the leadership structures of the wider organization and was hesitant to ask for time with the Executive Team. Once in meetings with the Executive Team, I took a more reactive stance than a learning stance. I made more statements designed to prop up a sense of my personal expertise to assuage my insecurity and asked few questions. Some of this is due to my own leadership challenges with approval-seeking and a lack of assertiveness; some to the nature of organizational change, and the newness of an Ed.L.D residency position at CCSSO. One of the most personally chilling statements repeated to me from all levels of the organization was a form of "you

will save us.” I actively worked against words or behaviors that would support any sense of me as a hero or savior, no matter how narcotic for my ego to be described as such. The statement served as a kind of mindfulness bell for me to be deliberate about handing the work back to the teams over and over. Successful handover of the learning seemed to begin when I heard the strategic memo I wrote as a shared organizational text referred to as “**the** memo” and not “**Shanna’s** memo.”

### **Psychological Safety, Trust, and Engagement**

CCSSO can be considered as its own ecosystem of knowledge work akin to a tidal wetland with information standing in for the ocean or river in this analogy. One of the reasons work has been siloed in specialized teams is because they mirror the specialization found in natural systems. To extend the metaphor, wetlands perform the vital functions of purifying water, soil preservation, flood storage, and wildlife support. Pollution and overdevelopment damage the system (University of Nebraska-Lincoln, 2020).

Likewise, CCSSO staff find, manage, and simplify access to complex information, act on that information by enrolling and collaborating with partners in advocacy of educational best practice, buffer the national political forces for states, and support the growth of state leadership. Poor communication functions as a form of pollution in this system, as does an overreliance on developing revenue as an organizational activity.

Edmondson's (2019) research into the concept of psychological safety and its effect on team performance and organizational health is convincing. Psychological safety, while easy to describe, is difficult to practice, but I argue that the project's evidence supports that the team meetings would be the place to start, if they follow the successful design from this project.

Team meetings designed for maximal engagement are paced through both an explicit agenda and timing attached to each of its items, which creates trust and reliability. This communicates respect for each participant's time and attention, as does beginning and ending on time. Another best practice from the project is to take the time to work with team leaders to make sure the meeting topic is relevant and meaningful for each member's perspective on the work of the organization. Allowing multiple opportunities for input and feedback, and making space for learning about each other's lives outside of work, are ways to purposefully transition from the outside world to the inside work. Abundant research evidence, both quantitative and qualitative, supports using these meeting structures (Boudett and City, 2014).

However, constraining psychological safety mechanisms to just team meetings caused a late realization that I had failed to make the case for the need to embed mechanisms for furthering psychological safety in other organizational activities. I did not use my two meetings with the executive cabinet well in this regard. I failed to explain the importance of psychological safety for culture and

how culture connects to the organization's finances (Otten, 2017; Bolden-Barrett, 2017).

A summary of project activities, evidence, and outcomes, when aligned to the points of Cohen and Kotter's framework, looks like the following:

**Table 4      Framework for Analyzing the Strategic Project**

| Analysis- Think - Change                                                                                                                                                                                                    | See - Feel - Change                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Activities:<br/>Information is gathered and analyzed and presented</p> <p><b>Status:</b> not presented</p>                                                                                                               | <p>Activities:<br/>Help people see with situations created to help others visualize problems</p> <p><b>Status:</b> completed</p>                                                                                                                                                                                                                                                                                                                                    |
| Outcomes:                                                                                                                                                                                                                   | Outcomes:                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <p>Goal: Information and analysis change people's thinking</p> <p><b>Evidence:</b> presentation of three different mission statements was a technical problem clear to each group as reported in responses</p>              | <p>Goal: Visualizations provide useful ideas that go beyond surface thinking - deeper thinking and discussion add emotional resonance to power change</p> <p><b>Evidence:</b> Responses show patterns of personal mission conception that highlight internal agreement and emphasize external misunderstanding and unfamiliarity of organizational mission; responses coded as "plus/deltas" reveal patterns of satisfaction with meeting process and structure</p> |
| <p>Goal: Gain rational buy-in by making a case for change based on solid data</p> <p><b>Evidence:</b> As above, responses from all interviews accepted the technical problem of multiple mission statements as a needed</p> | <p>Goal: Gain emotional buy in by providing a compelling story that catches people's attention and generates a high level of energy</p> <p><b>Evidence:</b> Responses, through personal narratives, were captivating and convincing; feedback coded as "hopes/fears" reveal desires for</p>                                                                                                                                                                         |

|                |                                                                                                |
|----------------|------------------------------------------------------------------------------------------------|
| project/change | missional language clarity, collective decision-making and participation in strategic planning |
|----------------|------------------------------------------------------------------------------------------------|

## IV. Implications

### Implications for Self

Given my particular personal history, I've always approached leadership as an exercise of exploiting situational uncertainty to inspire and create something new or different. Management of these kinds of projects operates through the cultivation of relationships and through co-creating processes and systems for widening buy-in. This residency allowed me to test my own story pattern, to question my familiar personal narrative and move past it. Buried within every challenge was an opportunity to learn and grow beyond my usual reactions and intrapersonal limitations. For example, writing the strategic memo and then sharing it with the executive team tested my openness to revising my thinking along with revising my words. This was an exercise in refining the description of a process so that it was comprehensible and actionable, which is much easier said than done. However, gathering information and presenting it as a case memo allowed all of us to share a text and to negotiate its accuracy and the adequacy of its planned activities. Essentially, the project allowed me to move along the spectrum of tempered change strategies from disruptive self-expression to strategic alliance-building that Meyerson (2001) describes, but

which had only existed as a course reading and did not appear applicable to my work at the beginning. Through the residency, I became a “tempered radical” in my leadership (p. 98).

The majority of learning along this leadership spectrum occurred between September and March. While the presidential platform work amplified my understanding of policy and the educational ecosystem, giving me a solid, intellectually fulfilling experience, it constrained my leadership learning to the assessment of the arguments and influence necessary to revise my programming position to a role as a strategic advisor. As a leader of such new work from an internal consulting position that had never existed, I often found myself questioning whether the project was impactful enough, especially when I compared it to the work underway in the residencies of other members of my cohort. As I moved into the position of helping with the strategic planning work, I found that it helped me synthesize much of my Ed.L.D. learning, especially in regard to adaptive leadership. For example, I discussed Heifetz and Linsky’s book with Dr. Miller, which helped me to comprehend it in realtime and overlay it on organizational problems of practice. These discussions also influenced her to read the book and begin the work of helping her executive and leadership teams to grasp the meaning of technical and adaptive change in their work. She encouraged me to see that this type of ‘advise and consent’ activity was evidence of my leadership and that this one idea would continue to influence the organization beyond my time there. It’s taken a long time for me to actually

understand Heifetz's metaphor of the balcony and the dance floor and how it might operate in my actual working life, but I'm grateful to CCSSO for allowing me to work out the metaphor's everyday application and gain insight for my future leadership.

Overall, the residency has been one of the most valuable learning experiences of my professional life, chiefly in leadership learning, exposing as it has, all the developmental pitfalls the Ed.L.D. coursework cautioned against.

Entering residency, my personal leadership goals were:

1. Lead organizational strategy formulation and design organizational learning experiences.
2. Practice managing up by being willing to tolerate both the discomfort of presenting less than perfect work to the executive team and being open to their feedback, guidance, and revisions. I often forgot to solicit performance feedback from Dr. Miller. This would have helped me avoid some self-inflicted anxiety because it would have provided me with evidence in the form of plus/deltas.
3. Practice adaptive leadership skills, especially "getting on the balcony" in every meeting as much as possible
4. Conduct an experiment in using a small, technical task as an approach for big, adaptive work and use outcomes to inform future attempts in similar strategy

I repeatedly called on my skills and experience as a classroom teacher and facilitator of professional development. Everything that served me in becoming an effective teacher is what I'm redesigning and deploying in hopes of becoming a better leader. If nothing else, fifteen years of classroom teaching in the most complex and challenging contexts taught me to accept the reality of the need for adaptive leadership.

**Table 5            Leadership Development Matrix**

| Technical & Adaptive Leadership Goals                                                                                                                                               | Developing                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Met                                                                                                    |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>Leading organizational strategy formulation</li> <li>Leading organizational learning</li> <li>Practice adaptive leadership skills</li> </ul> | <p>Getting feedback, updating, and consulting with leadership on the management and mid-management teams</p> <p>Opening up my thinking about strategy — I have never seen myself as a strategic thinker inside an organization, plus it has helped me to create and plan for bigger work inside the organization</p> <p>Managing up - only two meetings with team</p> <ul style="list-style-type: none"> <li>Opening the case memo to editing</li> <li>Check ins with Scott and Cariss to negotiate deliverables and timelines</li> </ul> | <p>Convening staff in teams to facilitate reflection organizational identity, purpose, and mission</p> |

|                                                                                                                          |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• More skilled in using technical change as entry into adaptive change</li> </ul> |  | <p>Creating bounded tasks, like answering reflective questions, as a first step in helping the organization try on the ambiguity and need to collaborate across teams.</p> <p>Creating a holding environment (meeting in teams across all staff, regardless of position/title) for listening across teams. Understanding how micropolitics (defined as shaping/influencing attitudes and perceptions) contribute to formal and informal authority to implement change.</p> |
|--------------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### **Implications for Site: CCSSO**

A clear pattern in interview responses formed around similar narratives of unfamiliarity with SEAs, what they do, how they function, or why they are important at the ground level of the school districts with which most people are familiar. This pattern highlights an area of opportunity for focus in external communications because understanding the mission and identity of CCSSO requires a component of definition for audiences without background knowledge of an SEA. For development efforts, it suggests that in creating a compelling case for funding the organization for potential donors, it's critical to create an understanding of the relationships between federal education oversight, SEAs,

local education agencies (LEAs), and how those relationships impact schools and children at a grassroots level.

In analyzing responses to the question of how individuals explain CCSSO to external audiences, I used two methods: online software<sup>16</sup> to analyze the text from the tables for word frequency, and a content analysis methodology to find language describing CCSSO's public purpose, including issues, activities, and functions. This is offered as evidence of each person's "personal mission conception" combined with their understanding that the organization's mission is to support education leaders, and policy in each state. It supports the primary focus for organizational work to be both for and from within the state, or polity.

**Table 6 Analysis of Frequent Words - Internal and External Responses**

Total word count = 329

| Word         | Occurrences | Frequency |
|--------------|-------------|-----------|
| state        | 17          | (5.2%)    |
| education    | 16          | (4.9%)    |
| support      | 13          | (4%)      |
| organization | 12          | (3.6%)    |
| chiefs       | 10          | (3%)      |
| policy       | 9           | (2.7%)    |

**Table 7 Analysis of Frequent Words - Documents**

Total word count = 271

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<sup>16</sup> [www.textalyzer.net](http://www.textalyzer.net)

| Word      | Occurrences | Frequency |
|-----------|-------------|-----------|
| state     | 10          | (3.7%)    |
| school    | 10          | (3.7%)    |
| education | 9           | (3.3%)    |
| chief     | 9           | (2.2%)    |
| officers  | 6           | (2.2%)    |
| service   | 6           | (1.8%)    |

Compared with the external, documented “dominant mission conception,” there is a high degree of agreement among each set of text. Each echoes the same ideas; the external document text adds an emphasis on the concept of the leader and adds “service” to the mix. These data sets were compared to determine areas of agreement and disagreement about who and what CCSSO is, does, and for whom, internally and externally. Agreement exists among the concepts of *state*, *education*, *chiefs*; disagreement is found with the concepts of *support*, *policy*, *organization*, *school*, and *service*.

Responses emphasized the collective impact of membership and the organization’s support and convening power as a forum to craft common positions, strategies, collaborations, and understandings. Further, it gives support to the executive director’s decision to refresh and focus the organizational mission on the concepts of leadership development, policy, advocacy, and practice.

## Recommendations

Identity is a thorny yet crucial dilemma for CCSSO. Its shift from a membership organization to a nonprofit umbrella association with dual sub-identities is a continuing adaptive challenge. It has always been and will continue to be a membership organization for the state chiefs. However, this identity limits its ability to grow since there are a finite number of states and territories to supply members. Likewise, operating purely as a nonprofit business sets it into competition in a crowded ecosystem of other actors pursuing most of the same funders. This also limits its sustainability.

My recommendation, based on these findings, is for CCSSO to orient itself in a meta-identity as a **polity**. This metaphor is one already familiar to an organization physically and existentially sitting in the nexus of D.C. politics and in fact emerged repeatedly in storytelling responses as its synonym *state*. As a term, polity is synonymous with more easily communicated concepts such as *community*, *body*, and *group*. Any of these terms might be helpful to the organization in its work with external audiences less familiar with SEAs or state chiefs.

Primarily, a polity meta-identity resolves the organization's structural dilemma and allows for focus on CCSSO's considerable strengths of stability, influence, institutional knowledge and reputation, convening power, and its value in cross-sector networks, especially those overlapping with public health.

Defining itself as a polity allows the organization to merge its membership and nonprofit halves into a whole that coheres around a value of **collective impact**. As a collective, CCSSO can mobilize the intellectual capital of its members and its in-house expertise to create a common agenda, shared measurement and accountability, a mutually reinforcing plan of action, communication, and diffusion among the membership and partners. From its nonprofit side, CCSSO can act as the “backbone” and coordinator of the agenda’s initiatives.<sup>17</sup> This might look like, for example, revisiting the *Leading For Equity* document to find three to five commitments from the list of ten that the entire polity can agree to as priorities.

For funding purposes, a collective impact strategy allows CCSSO to operate from a portfolio of its cross-sector initiatives to demonstrate and evaluate its various effects, which would allow for a mix of place-based and national initiatives drawn from its work with member states and partners, such as the outcomes for the presidential platform focus on improving the conditions for learning or the literacy summit. As policy experts operating from a collective impact frame, CCSSO could leverage its partnerships in business and government to meet deep and often intractable needs. A collective impact orientation positions CCSSO as a powerful problem-solving association that can stand in the gap where business and government are unable to gain traction by themselves. Finally, operating from a collective impact design authentically coheres both halves of the organization around a mission and vision that

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<sup>17</sup> “Embracing Emergence: How Collective Impact Addresses Complexity” Kania & Kramer, (2013).

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anticipates emergent cross-sector challenges, such as COVID-19, but names this work and is able to demonstrate its uncommon ability for rapid response. Creating board and staff understanding of this meta-identity will be an important strategic activity going forward because it will help CCSSO articulate its unique value proposition.

Culturally, CCSSO would benefit from providing staff with job-embedded professional growth opportunities, (e.g. *Immunity To Change* developmental coaching),<sup>18</sup> because it can address some of the data in the Best Nonprofits survey pointing to specific desires for training and advancement. Intentional and ongoing development could stand in place of limited opportunities for internal promotion and budget constraints for higher salary.

Most importantly, designating a person to lead all professional development and organizational learning is a key recommendation. A specific role would allow for the collection of data showing how and what teams are learning, lead analysis of insights, cultivate a culture of inquiry, and collect process data to assess how well systems are working and what further information or research might be needed. “The [learning officer’s] strength is their ability to move about the larger organization, to participate in and nurture broad networks of alliances with other, like-minded individuals, and to help..leaders [become] more aware of the support that change initiatives in the company need from them” (Senge, et al, 1999).

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<sup>18</sup> See *Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization* (2009). Kegan and Lahey. Harvard Business Review Press.

Crucial responsibilities for this position include acting as a liaison between the teams to build capacity for cross-functional collaboration; and leadership of a vision team to continue the strategic mission work. This person would also work with the communications and HR teams to ensure equity and clarity in expectations for cross-functional teaming. An exceptionally skilled person could also generate content for and collaborate with the team planning the leadership conference to keep offerings innovative and proprietary to CCSSO. Finally, this person would work alongside the executive director and chief of staff to develop learning experiences for the board and funders to develop shared understanding of technical and adaptive challenges and how CCSSO is positioned to iterate and innovate promising practices and solutions.

This role also would ideally function as a Storyteller In Chief and develop storytelling assets at all levels, including among the board members. This strategy adopts the marketing and content strategy from business and advertising and puts it to work in service of internal messaging around programming, policies, and leadership; as well as externally in development and advocacy efforts. The Storyteller In Chief title, as part of the learning leader's role, would have the responsibility to help develop the skill of public narrative<sup>19</sup> with members of the executive and communications teams. This work would help to shape CCSSO's image, tell its advocacy and policy story, and showcase work being done to operationalize equity. The strategic use of storytelling, in this

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<sup>19</sup> See Ganz (2011) and Mahoney, A. (2017)

conception, is to describe the impact CCSSO has. If the concept of story is broadened to include participation, then many more opportunities for narrative emerge with events that feature marginalized voices, notably those of students.

This project's execution and evidence convinced me that the staff wants to engage in deeper learning and that the organization would benefit from a learning officer or director responsible for creating and supporting ongoing learning grounded in adult development principles.<sup>20</sup> If this is unworkable, the Council should consider recruiting for a fellowship designed to accomplish this work. Whether this is another Ed.L.D. resident, a resident from another university, or funded by a philanthropic partner, this role should be protected and bounded for specific adult learning work. A secondary consideration is the addition of a tool to support cross-functional team communication and a formalized feedback mechanism. Slack, for example, is a tool that allows for both tasks; another tool to support a positive culture is Tiny Pulse.<sup>21</sup>

Finally, normalize for everyone that CCSSO's current change process is reflected across many nonprofits in the sector who are coping with disruption in human and financial resources. With that understanding, focus on the mission and vision as a way to resist the temptation to empower technical solutions. For example: "getting more money will fix us" or if we just "get rid of her or him, things will be better." As a colleague who works at Google shared with me recently, "We should stop being obsessed with cultural *fit* and look at cultural *add*. How are the

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<sup>20</sup> See Appendix I for Learning Officer and Learning Fellow roles description/proposal

<sup>21</sup> See [slack.com](https://slack.com) and [tinypulse.com](https://tinypulse.com), both of which have wide adoption in similar-sized organizations

people we're bringing onboard working to add value for everyone? That's the question." Certainly, the people — all the people in an organization — are responsible for solving their problems, but the technical/adaptive framework doesn't offer much guidance for *how* people should begin solving their own problems or adding value. This is where Edmondson's work, Heifetz, et al's field guide for the practice of adaptive leadership, and Bolman and Deal's frameworks, particularly the social architecture frame, could be of help. Systemic, adaptive problems can only be solved by adaptive systems of human creation and responsiveness.

In addressing the ongoing adaptive change required for the organization's transformation and survival, I submit that there are three specific actions to begin as soon as possible.

### **Recommendations for Action**

1. Create a **learning officer** or director position to sit inside the Equity Team.

Organizational learning is complex and needs to be ongoing in a knowledge organization like CCSSO. This role supports human resources with recruitment and retention because it provides employees with non-monetary, but important benefits of personal development. The role further supports the Equity Team in its work of awareness and unlearning of bias. This role is often described in the corporate world as a "Chief Storyteller." A recent LinkedIn search of the term "storyteller," returned 99,035 results for people who officially list this as their job title, so it is

becoming more broadly accepted as a role. Keystone texts for this work are *The Practice of Adaptive Leadership* (Heifetz, Grashow, & Linsky) and *The Fifth Discipline Fieldbook* (Senge, Kleiner, Roberts, et al, 1994).

2. An embedded, regular **feedback mechanism**. This can use both synchronous and asynchronous tools. A caveat is to ensure that the learning officer creates job-embedded learning experiences to facilitate their use, co-creates norms and expectations for it, and collects assessment data of its efficacy. The lowest-tech, highest-leverage synchronous tools are Meeting Wise templates. These are recommended for all meetings and Plus/Delta anonymous anonymous feedback collection as an after action review process<sup>22</sup> to keep meetings relevant and useful. I've experienced the power of these protocols firsthand in Harvard classes, the DataWise process, the PELP process, and in student work teams. Beyond academia, these kinds of tools are normalized in many mid-to-large size businesses. Bridgewater Associates, one of the organizations featured as a case study in *An Everyone Culture: Becoming a Deliberately Developmental Organization* (Kegan and Lahey, 2016), embeds a feedback process in every staff interaction at all levels. Ray Dalio, Bridgewater's founder, is an evangelist for the learning that comes from feedback and identifies it as a critical factor for innovation and sustainability. Dalio's cross-sector influence is based on his corporate

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<sup>22</sup> See "Learning In the Thick of It" in Harvard Business Review, July-August, 2005

success and explained in a popular TED talk<sup>23</sup> on what he calls “radical transparency” and in a book that functions as a collection of ‘lessons learned.’<sup>24</sup>

3. An ongoing **vision process** led by a guiding team. For a nonprofit, its mission is what inspired its founding, attracts board members, staff, and donors. That work should continue and be informed by Cohen and Kotter’s guidance in *The Heart of Change Field Guide*. A process designed to create deliberate steps for leading and implementing lasting change would benefit CCSSO as a builder of its capacity and sustainability, regardless of retrenchment or turnover. The guiding team for leading this work should recruit from all parts of the organization to analyze alignment of policy, practices, and procedures. In this way, CCSSO’s strategic plan will be strengthened from their insight and achievable recommendations about what is important, what has value, and what choices to make for its future.

### **Implications for Sector**

Nonprofit leadership is exceptionally challenging. The nonprofit sector, like the education sector, is enduring stress wrought by demands from multiple outside forces. Each faces its own particular leadership crisis, with both called to address complex problems without the full financial sustainability to fulfill their missions. These missions are grounded in humans, who are notoriously difficult to standardize, yet operate within a culture obsessed with outcomes. This can

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<sup>23</sup> “How To Build a Company Where the Best Ideas Win”

[https://www.ted.com/talks/ray\\_dalio\\_how\\_to\\_build\\_a\\_company\\_where\\_the\\_best\\_ideas\\_win](https://www.ted.com/talks/ray_dalio_how_to_build_a_company_where_the_best_ideas_win)

<sup>24</sup> *Principles* (2017). New York: Simon and Schuster

become an almost manic attachment to “results” to the point that it’s easy to lose sight of the humans within the system. This often means that to survive, organizations constrain their work to safer and smaller tasks that drift farther away from the expansive language in their missions. Understandably, this causes a focus on short-term goals that set up a system of diminishing impact. Where schools are forced to focus on test scores, nonprofits are necessarily bound to constant fundraising. Neither system is sustainable and often burns out the people inside them.

This is principally true for nonprofit leaders, according to recent survey data from the Sustainable Philanthropy report that found 67 percent of nonprofit leaders are planning to leave their position within five years; no formal succession plan exists for the majority of those positions; and 80,000 senior level leaders will be needed in the sector annually. Respondents said they “feel undervalued and under-invested in [and] strategic planning, or many aspects of it, appears to be absent or undeveloped in many organizations” (Sargeant and Day, 2018). This is tragic for mission-oriented organizations because they exist to meet needs that government often cannot.

The deliberate development of leaders throughout nonprofit organizations is critical. This is where the sector might adopt a focus on organizational learning tied to the improvement of culture and communication. Regular mission assessment and alignment of how it is revealed in the organization’s key activities is an unexplored and potentially high-leverage intervention. As an

embedded reflective practice, this intervention could work as a “pattern interrupter” for the nonprofit sector’s leadership churn. What that might look like, as Heifetz, et al (2009) suggest, is a normalized debriefing process for people within an organization to learn how they can maximize their leadership potential and discover where they can make deeper contributions to the mission. He notes that this is difficult to put into practice because senior leaders are invested in continuing the rewards of advancement that came from their ability to have answers and direct the action. But an openness to learning is a critical attribute for adaptive leaders. A willingness to experiment and explore, to lean into the discomfort of not knowing and cultivate a tolerance for revising former certainties supports the adaptations necessary to keep these leaders relevant and their businesses thriving. This encourages deeper personal investment and creates a distributed ability for seeing external opportunities for the organization as well as operate as an early warning system for changes that might impede its importance and influence within its ecosystem.

The sector would also benefit from becoming more literate in the language of technical and adaptive change management. The *Heart of Change* framework would be a key learning tool in this regard, especially if it invited external stakeholders into the learning. Boards would benefit from understanding the differences in strategic planning for technical problems and adaptive challenges, and the resource and infrastructure needs for each. Funders could be welcomed into this work so the singular nature of the mission as more adaptive — and

therefore more complex and resistant to simplistic measurements of outputs — could be seen and felt instead of merely analyzed.

## **V. Conclusion**

Learning is often uncomfortable. As leaders and teachers; academics and professionals, we face equally painful pressures to have answers, provide solutions, and be endlessly and effortlessly innovative. Schein (2013) argues this creates a “telling culture” that blunts our capacity for learning. He warns that “in an increasingly complex, interdependent, and culturally diverse world, we cannot hope to work to understand and work with people if we do not know how to ask questions and build relationships that are based on mutual respect and recognition that others may know things that we may need to know in order to get a job done” (p. 2). An inability to socialize humble and authentic inquiry feeds fragmentation inside our organizations and steers them toward controlling hierarchies, which is antithetical to learning.

Contrast this with a culture of storytelling. This dynamic upends our whole knowledge economy and its insistence on information transmission through those distressing presentations of “metrics” and “performance indicators,” “scores,” and other such forms of what the 13th Century poet Rumi called “conduits of plumbing-learning” (2004). A storytelling culture is predicated on listening and powered by empathy and connection. It is personal and invitational, uncovering what sociologist Brene Brown (2012) calls “data with a soul” (p. 252). When

learning is grounded in storytelling and listening, the pressure toward leadership as a performance of certainty dissipates.

Anderson (2016) argues that stories “helped make us who we are” and paraphrases the work of anthropologist Polly Wiessner at the University of Utah who finds that “the best evidence from archaeology and anthropology suggest that the human mind co-evolved with storytelling.” Coinciding with the discovery of fire, Wiessner says, storytelling worked as a social technology. “These stories played a crucial role in people’s ability to imagine and dream and understand the minds of others. They allowed human beings to explore vast social networks and to build imagined communities far beyond the borders of their local social group. Stories brought social status to great storytellers and actionable insights to great listeners. It’s not just that we all love hearing stories, it probably helped to shape how our minds receive and share information” (pp. 63-64).

We would do ourselves deep service to recover a reverence for the learning that happens when we share stories. The strategic project was an experiment in using storytelling as a technology to mitigate the dilemmas of retrenchment and to deploy it strategically as an experience of organizational learning. It sought to construct that learning as a non-threatening invitation to share stories of each individual’s motivations for and understanding of CCSSO’s mission and how that connects to its identity. One anonymous respondent at the end of a storytelling interview seemed to sum up the experience as being one energized by hope: “We can engage in true discussion about the work itself

flowing into the vision and how to de-silo the organization in the process of strategic planning.”

As a doctoral student, I was interested in how responses such as this naturally surfaced conceptions of teaming and strategy. As a practitioner of adaptive leadership, I was thrilled to see how the learning could be handed over to the people experiencing the challenge. As a believer in collective impact, I found my work with CCSSO to point toward the truth that the more people are made part of the solution, the more they will support change. Nonprofits like CCSSO would be wise to follow its model of openness to involve staff in the work of strategic planning rather than concentrating it into a few experts, and most importantly, follow their lead of leaning into the discomfort of learning. As we enter a post-COVID19 world, it will be even more incumbent upon us to work together in the process of healing all of our communities. Part of that healing begins when we make space for each other’s stories.

## Appendices

### Appendix A:

Slides from October 2019 Member Survey conducted by Edge Research provided by Margaret Reed Millar, CCSSO Senior Program Director, State Leadership; and slides from April All Staff Meeting, 2018 and April All Staff Meeting, 2019, provided by Jennifer Tyson-Atkinson, Human Resources Director

### Key Findings

- ⌘ **CCSSO receives “best-in-class” ratings among professional membership organizations.** In 2019, member satisfaction is high, Net Promoter Score is up from last year, and both Chiefs and Deputies recognize benefits in multiple areas.
- ⌘ **However, it’s no time for CCSSO to rest on its laurels.** New additions to the survey this year validate recent CCSSO investments and indicate areas for growth (e.g. Equity and Leadership Development). Given the high-turnover and high-stakes for Chiefs, CCSSO needs to stay dynamic to meet their needs. Deputies are satisfied, but some are hungry for more support from the “Chiefs” organization.
- ⌘ **Tracking shows that CCSSO has made progress in many key areas.** In addition, members across regions and roles are consistent in what they see as **top-tier needs** for support from CCSSO.

*See drill downs by Topic and the Excel spreadsheet of verbatims for additional detail.*

## Key Findings Cont.

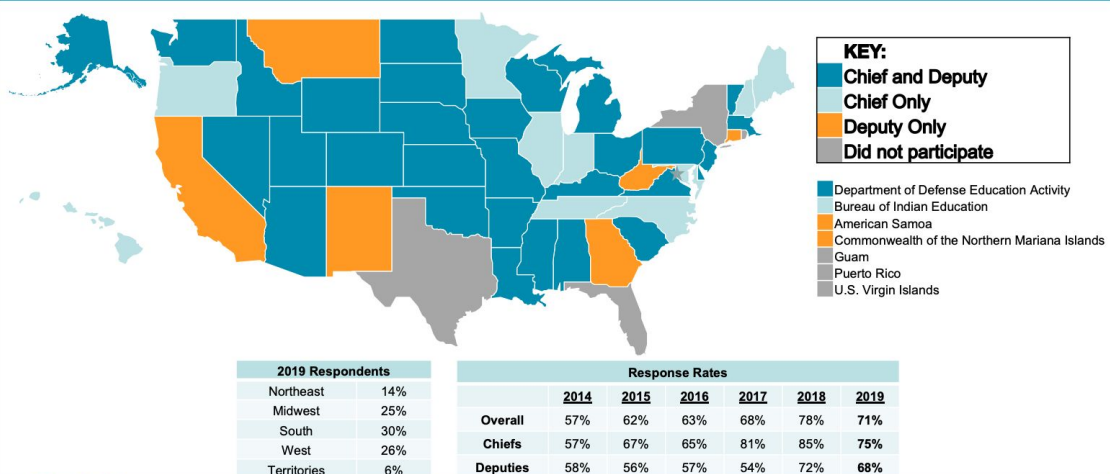
### ⌘ Specific points of interest for the future:

- **Equity** – school culture, focusing on teachers and leaders (slide 25)
- **Teacher Workforce** – retaining high quality teachers, diversity of workforce (slide 27)
- **Teacher Leaders** – teacher leadership development (slide 28)
- **School and District Leadership** – professional learning for principals, mentoring and coaching for principals, diversifying principal pipeline (slide 29)
- **Early Learning** – improving access, building workforce (slide 31)
- **Career Readiness** – increasing access to high-skills career pathways (slide 32)
- **Academic Assessments** – exploring non-traditional assessments, creating balanced assessments (slide 33)
- **State Accountability Systems** – state report cards, alignment between accountability systems and systems of support (slide 34)
- **Academic Standards** – improving outcomes for struggling students, standards aligned instruction, and aligning supports and standards for certain populations (slide 36)

See drill downs by Topic and the Excel spreadsheet of verbatims for additional detail.

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## Survey Participation

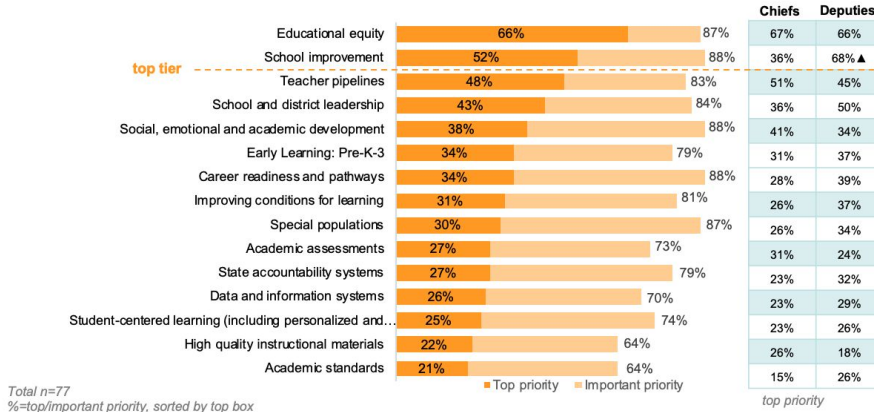


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## Priority Areas

All priorities

- Two thirds say "Equity" is a top priority, and among Deputies "School improvement" is top tier.
- "Teacher pipelines" and "School/district leadership" make up the second tier



24

## Best Companies to Work For - Results

NPT's BEST NONPROFITS TO WORK FOR 2018

### 2016 NPT's Best Nonprofits To Work Top 50

- 1 Team National El Segundo CA
- 2 O'By Foundation Bismarck ND
- 3 Big Brothers Big Sisters of the Midlands Omaha NE
- 4 The Center for Trauma & Resilience Denver CO
- 5 Englewood Center San Antonio TX
- 6 National Communication Association Washington DC
- 7 The Mission Continues EL Paso MO
- 8 LINC Arlington VA
- 9 Legal Aid Society of the District of Columbia Washington DC
- 10 Communities in Schools National Office Arlington VA
- 11 Fleet & Boat International Panama PA
- 12 Space Foundation Colorado Springs CO
- 13 Kessler Foundation West Orange NJ
- 14 American Heart Association Dallas TX
- 15 National Board for Certification in Occupational Therapy Gathensburg MO
- 16 Partnership for Public Service Washington DC
- 17 Gishwater Association Chicago IL
- 18 Make-A-Wish Illinois Chicago IL
- 19 CAP Tulsa Tulsa OK
- 20 ZERO - The End of Prostate Cancer Alexandria VA
- 21 Caring Transitions TX
- 22 Young Community Developers San Francisco CA
- 23 Good Housekeeping Washington DC
- 24 PRS McLean VA
- 25 PewCharitable Trusts Atlanta Georgia GA
- 26 DoSomething.org New York NY
- 27 Women's Business Enterprise National Council Washington DC
- 28 The Urban Cancer Fund for Young Adults Baltimore MD
- 29 Navy Marine Corps Relief Society Arlington VA
- 30 JoplinLife Joplin MO
- 31 Pathway Home Fairfax VA
- 32 Career Path Services Spokane WA
- 33 Good Housekeeping Washington DC
- 34 Emergency Center Legal Center Atlanta Georgia GA
- 35 The Achievement Network (ANet) Boston MA
- 36 Youth Connection Cleveland Ohio OH
- 37 CCISD Washington DC
- 38 Oklahoma for Youth & Families Oklahoma City OK
- 39 Community Food Bank of Southern Indiana Evansville IN
- 40 Metro New York NY
- 41 Iowa State Old History TN
- 42 Carling Vision Coalition Metairie LA
- 43 Century Housing Corporation Denver CO
- 44 The Children's Home of Cincinnati Cincinnati OH
- 45 Year Up Boston MA
- 46 Brightlight Foundation New York NY
- 47 Community Legal Services of Mid-Polina Daytona Beach FL
- 48 Summer Search San Francisco CA
- 49 American College of Emergency Physicians Irving TX
- 50 Our Family Services Tucson AZ

### TOP 50 NPT's BEST NONPROFITS TO WORK FOR 2017

| Rank | Organization                                             | City            | State |
|------|----------------------------------------------------------|-----------------|-------|
| 1    | DonorsChoose.org                                         | New York        | NY    |
| 2    | Communities in Schools National Office                   | Arlington       | VA    |
| 3    | Team Rubicon                                             | Los Angeles     | CA    |
| 4    | Kessler Foundation                                       | West Orange     | NJ    |
| 5    | Big Brothers Big Sisters of the Midlands                 | Omaha           | NE    |
| 6    | Education Commission of the States                       | Denver          | CO    |
| 7    | Legal Aid Society of the District of Columbia            | Washington      | DC    |
| 8    | DoSomething.org                                          | New York        | NY    |
| 9    | The Land's Place                                         | West Palm Beach | FL    |
| 10   | ZERO - The End of Prostate Cancer                        | Alexandria      | VA    |
| 11   | Oneness                                                  | Dorchester      | MA    |
| 12   | InterfaithFamily                                         | Newton          | MA    |
| 13   | Young Community Developers                               | San Francisco   | CA    |
| 14   | Good Housekeeping                                        | Washington      | DC    |
| 15   | CCISD                                                    | Washington      | DC    |
| 16   | Alzheimer's Association                                  | Chicago         | IL    |
| 17   | Navy Marine Corps Relief Society                         | Arlington       | VA    |
| 18   | The SAFE Alliance                                        | Austin          | TX    |
| 19   | CAP Tulsa                                                | Tulsa           | OK    |
| 20   | American Heart Association                               | Dallas          | TX    |
| 21   | The Children's Home of Cincinnati                        | Cincinnati      | OH    |
| 22   | AHC                                                      | Arlington       | VA    |
| 23   | Good Housekeeping                                        | Washington      | DC    |
| 24   | Office of Chief State School Officers                    | Washington      | DC    |
| 25   | NewsMatters                                              | Dorchester      | MA    |
| 26   | Brighton Center                                          | San Antonio     | TX    |
| 27   | The Center for Trauma & Resilience                       | Denver          | CO    |
| 28   | PENCL Foundation                                         | Nashville       | TN    |
| 29   | Partnership for Public Service                           | Washington      | DC    |
| 30   | Mentor                                                   | New York        | NY    |
| 31   | Directions for Youth & Families                          | Columbus        | OH    |
| 32   | The Urban Cancer Fund for Young Adults                   | Detroit         | MI    |
| 33   | Palmer Beach Rehabilitation Center                       | Lake Worth      | FL    |
| 34   | NJ Society of Certified Public Accountants               | Roseland        | NJ    |
| 35   | Career Path Services                                     | Baltimore       | MD    |
| 36   | STAR Center                                              | Jackson         | TN    |
| 37   | Alp of Annapolis County                                  | Frederick       | MD    |
| 38   | Year Up                                                  | Baltimore       | MD    |
| 39   | BBP                                                      | Austin          | TX    |
| 40   | National Institute of Aerospace                          | Hampton         | VA    |
| 41   | College Foundation of the University of Virginia         | Charlottesville | VA    |
| 42   | National Board for Certification in Occupational Therapy | Gathensburg     | MO    |
| 43   | Service Access and Management                            | Clarton         | PA    |
| 44   | The Mission Continues                                    | New York        | NY    |
| 45   | Pathway Homes                                            | Fairfax         | VA    |

### TOP 50 NPT's Best Nonprofits To Work For 2018

| Rank | Organization                                               | City             | State |
|------|------------------------------------------------------------|------------------|-------|
| 1    | Communities in Schools                                     | Arlington        | VA    |
| 2    | Wounded Warrior Project                                    | Indianapolis     | IN    |
| 3    | The Land's Place, Inc.                                     | West Palm Beach  | FL    |
| 4    | Prostate Cancer Network, Inc.                              | Charlottesville  | VA    |
| 5    | CAM Community Health                                       | Sarasota         | FL    |
| 6    | 2000 - The End of Prostate Cancer                          | Alexandria       | VA    |
| 7    | Eye to Eye National                                        | New York         | NY    |
| 8    | Legal Aid Society of the District of Columbia              | Washington       | DC    |
| 9    | Shoreline Streets Team                                     | San Jose         | CA    |
| 10   | Good Housekeeping                                          | Washington       | DC    |
| 11   | DonorsChoose.org                                           | New York         | NY    |
| 12   | Career Path Services                                       | Syracuse         | NY    |
| 13   | Oneness                                                    | Newton           | MA    |
| 14   | Good Housekeeping                                          | Arlington        | VA    |
| 15   | San Francisco                                              | San Francisco    | CA    |
| 16   | Washington                                                 | Washington       | DC    |
| 17   | Colorado Springs                                           | Colorado Springs | CO    |
| 18   | Good Housekeeping                                          | Arlington        | VA    |
| 19   | Education Commission of the States                         | Denver           | CO    |
| 20   | DoSomething.org                                            | New York         | NY    |
| 21   | CAP Tulsa                                                  | Tulsa            | OK    |
| 22   | WPC                                                        | New York         | NY    |
| 23   | The For Association, Inc.                                  | New York         | NY    |
| 24   | The Urban Cancer Fund for Young Adults                     | Baltimore        | MD    |
| 25   | PRC, Incorporated                                          | McLean           | VA    |
| 26   | Good Housekeeping                                          | Washington       | DC    |
| 27   | Brighton Center                                            | San Antonio      | TX    |
| 28   | Alzheimer's Association                                    | Chicago          | IL    |
| 29   | Good Housekeeping                                          | Washington       | DC    |
| 30   | National Board for Certification in Occupational Therapy   | Gathensburg      | MO    |
| 31   | Children's Home Foundation                                 | New York         | NY    |
| 32   | Kessler Foundation                                         | West Orange      | NJ    |
| 33   | Year Up                                                    | Jackson          | TN    |
| 34   | STAR Center                                                | Jackson          | TN    |
| 35   | Charter Aid Foundation of America                          | Charlottesville  | VA    |
| 36   | Animal Legal Defense Fund                                  | Orlando          | FL    |
| 37   | Good Housekeeping                                          | Washington       | DC    |
| 38   | Good Housekeeping                                          | Washington       | DC    |
| 39   | Good Housekeeping                                          | Washington       | DC    |
| 40   | Association for Vision Rehabilitation and Employment, Inc. | Englewood        | NY    |
| 41   | WPC                                                        | New York         | NY    |
| 42   | Pearl's Black International, Inc.                          | Parkville        | MO    |
| 43   | American Heart Association                                 | Dallas           | TX    |
| 44   | Good Housekeeping                                          | Washington       | DC    |
| 45   | Palmer Beach Rehabilitation Center, Inc.                   | Lake Worth       | FL    |
| 46   | Community Food Bank of Southern Arizona                    | Phoenix          | AZ    |
| 47   | The Marine Foundation                                      | Port Washington  | NY    |
| 48   | The Children's Home of Cincinnati                          | Cincinnati       | OH    |
| 49   | Good Housekeeping                                          | Washington       | DC    |
| 50   | Better Business Bureau                                     | Austin           | TX    |

## 2019 Best Companies to Work For – Areas for Growth



- ❖ Changes that may affect me are communicated to me prior to implementation
- ❖ This organization provided as much initial training as I needed
- ❖ I trust that if I do good work, I will be considered for a promotion
- ❖ Staffing levels are adequate to provide quality products/services
- ❖ There is room for me to advance at this organization
- ❖ I'm satisfied with the tuition reimbursement benefits
- ❖ I understand what is expected for career advancement



## Appendix B - CCSSO's Ten Equity Commitments

State chiefs play a central role in advancing educational equity for all students and committing to transformation for the most disadvantaged students. The following ten commitments are actions state chiefs and their state education agencies (SEAs) can take to improve educational equity. SEAs should also consider using federal funding and flexibility granted by the Every Student Succeeds Act (ESSA) to strengthen state efforts.

1. Prioritize Equity: Set and Communicate an Equity Vision and Measurable Targets
2. Start from Within: Focus on the State Education Agency
3. Measure What Matters: Create Accountability for Equity
4. Go Local: Engage Local Education Agencies (LEAs) and Provide Tailored and Differentiated Support
5. Follow the Money: Allocate Resources to Achieve Fiscal Equity
6. Start Early: Invest in the Youngest Learners
7. Engage More Deeply: Monitor Equitable Implementation of Standards and Assessments
8. Value People: Focus on Teachers and Leaders
9. Improve Conditions for Learning: Focus on School Culture, Climate, and Social-emotional Development
10. Empower Student Options: Ensure Families Have Access to High-quality Educational Options That Align to Community Needs

**Appendix C Mission storytelling theory of action slide used in meetings  
and with external stakeholder interviewees**

Our Task  
5 minutes

The theory of action for the team meetings is: If we spend time thinking about what we do, how we accomplish that, who we serve, and why we exist, then we will be able to draft mission and vision statements that will guide more authentic strategy and coherent work.

**Appendix D**

**A Brief History of the Presidential Platform Projects & Their Impacts**

| Year | Presidential Platform                                     | Led To                                                                                                                                                                                                                                                                                                                                                                                        |
|------|-----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2020 | Jillian Balow (WY):<br>Truncated due to COVID-19 pandemic | At APF in November, 2019, Supt. Balow framed her platform focus, “Beyond the Bell” with a presidential address highlighting a story about her daughter’s need for care. The story illustrated Balow’s intention to involve community partners in supporting students with multiple needs. Because of the COVID-19 pandemic, which began to affect organizational work in March, 2020, Balow’s |

|      |                                                          |                                                                                                                                                                                                                                                                                                                                                                               |
|------|----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      |                                                          | platform necessarily shifted to coordinating state responses to the outbreak.                                                                                                                                                                                                                                                                                                 |
| 2019 | Pedro Rivera (PA):<br>Conditions for Learning            | Developed a toolkit of resources for state leaders aligned to Leading for Equity Commitment 9 “Improve Conditions for Learning.” Resources include guidance and state spotlight documents on addressing chronic absenteeism, measuring and improving school climate, braiding and blending federal funds to meet the whole needs of children, and partnering across agencies. |
| 2018 | Carey Wright (MS):<br>Early Childhood Education          | Served as a national advocate for early childhood education and support for other states as they take on concrete action steps to ensure students are kindergarten ready. Elevated attention and resources to implement Leading for Equity Commitment 6, “Start Early: Invest in the Youngest Learners”.                                                                      |
| 2017 | Melody Schopp (SD):<br>Elevating the Teaching Profession | Development of the Teacher Table initiative to bring educators together to use data to inform policy making in states. Elevated attention and resources to advancement of Leading for Equity Commitment 8, “Value People.”                                                                                                                                                    |
| 2016 | Tony Evers (WI): Equity                                  | The development of the anchor document “Leading for Equity: Opportunities for State Education Chiefs”                                                                                                                                                                                                                                                                         |

|      |                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------|---------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      |                                                               | that was then embedded within the CCSSO strategic plan for 2017-2020 and publicized through numerous national events.                                                                                                                                                                                                                                                                                                                                                                              |
| 2015 | June Atkinson (NC): Continued focus on Career Readiness       | CCSSO secured the Council's largest grant in its history through J.P. Morgan Chase to support 24 states and the District of Columbia in <b>securing grants through phase one of New Skills for Youth</b> to perform a diagnostic assessment of their career preparation system and prepare for implementation of a new action plan. This work was rooted in the report by CCSSO's 2014 Career Readiness Taskforce offering recommendations for states to improve career readiness in K-12 schools. |
| 2014 | Terry Holliday (KY): Career Readiness                         | The launch of a CCSSO Career Readiness Taskforce and the development of a set of concrete recommendations for improving career readiness in the <u>O</u> pportunities and Options: Making Career Preparation Work for Students.                                                                                                                                                                                                                                                                    |
| 2013 | Mitchell Chester (MA): Continued focus on Teacher Preparation | The funding and launch of the Network for Transforming Educator Preparation (NTEP) – a network of states that used policy                                                                                                                                                                                                                                                                                                                                                                          |

|      |                                            |                                                                                                                                                                                                                                                                                                               |
|------|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      |                                            | levers identified in the <a href="#">report</a> written by the 2012 CCSSO Task Force on Transforming Educator Preparation and Entry into the Profession to locally build bridges to higher education and transform educator preparation.                                                                      |
| 2012 | Tom Luna (ID):Focus on Teacher Preparation | The launch of a CCSSO Task Force on Transforming Educator Preparation and the development of the anchor report, Our Responsibility, Our Promise: Transforming Educator Preparation and Entry into the Profession that is still referenced as of the 2017 member survey by the majority of chiefs in deputies. |

(personal interview and material provided by Margaret Millar)

## Appendix E Case Memo Prepared for Executive Leadership Team

November 18, 2019  
TO: CCSSO Executive Team  
FROM: Shanna Peeples

People Support What They Help Create: Transforming Into a Learning Culture

### Context

Council members first convened in Washington in 1908 at the invitation of the U.S. Congress, which was seeking advice on crafting federal policy for vocational education. In 1927 the council was incorporated as a private nonprofit organization.

CCSSO's research and expertise provides technical assistance through data collection, longitudinal studies, and information sharing among its members. It advocates for federal education policy before Congress and each administration, partners with federal agencies and

private foundations on statistical studies such as the Wallace Foundation's Principal Preparation initiative and Leaders Count.

Programmatic services include annual sponsorship of the National Teacher of the Year selection, the National Conference on Student Assessment, a legislative conference, annual policy forum, a summer leadership convening, and fifteen systems- and subject-focused state collaboratives to support the work of state education agencies.

The scope of CCSSO's reach is impressive, serving as it does: 50 million K-12 public education students and 3.8 million teachers who learn and teach inside 98,280 public schools within 13,601 school districts. It performs this service from three intersecting areas of advocacy and policy, policy implementation, and practice.

The Council co-founded the National Council for Accreditation of Teacher Education in 1952 and the Data Quality Campaign to improve the collection and assessment of education data in 2005. Notably, in collaboration with the National Governors Association, CCSSO was fundamental in the co-creation of the Common Core State Standards in 2010, ESSA in 2015 and the Leading For Equity Commitments in 2017.

CCSSO's organizational activities suggest that its theory of action positions SEAs as the unit of educational change: If we support and advise SEAs in their oversight and guidance of LEAs, then we can effect system change at multiple levels, help create the conditions in districts and schools that lead to equitable opportunities, and advise the strategic allocation of resources to advance equity for all children.

CCSSO works from a strategic plan begun in 2017 which operates on six goals and 26 goal-related strategies. Internal management structure reflected these six goals with staff identifying themselves as a member of "Goal Team X" and to describe their workstream from the associated strategies (e.g. 2.1 "Manage transitions into K-12"). The board of directors recently questioned the composition of the plan and requested revisions. Internally, leadership noted that the plan's preface describes a body of work for SEAs rather than CCSSO.

Recent survey data shows that "CCSSO receives "best-in-class" ratings among professional membership organizations. In 2019, member satisfaction is high, Net Promoter Score is up from last year, and both Chiefs and Deputies recognize benefits in multiple areas." However, CCSSO's recent Best Nonprofits staff survey data (gathered in November 2018 and reported in April) shows a decline in several areas: Culture and Communications, Leadership and Planning, and Role Satisfaction, Training and Development. Six focus groups have been conducted internally to gather qualitative data.

CCSSO's most recent audit, in October 2018, judged its financial statements to be presented fairly and in accordance with general accounting principles. As a nonprofit, its operating budget is largely dependent upon grants and contracts from federal agencies, private foundations, and corporate sponsors; membership dues and investment income are a smaller portion of revenue. Grants help to create new programs or grow an existing one, but they don't typically sustain the operating budget or sometimes even the program a particular funder began. As program officers at foundations change, funding priorities and allocation decisions change. The Gates Foundation, one of CCSSO's primary funders, alerted leadership to a change in its allocation for the operational budget. Leadership was prepared for less money, but the amount received was a shock to the system. Gates monies were nearly half of what was expected, causing a budgeting shortfall and the necessity of using reserve funds to resolve it. The financial situation influenced staffing decisions which resulted in layoffs, planned attrition and voluntary turnover.

Finally, organizational chart changes begun over the summer shifted the structure from a traditional cabinet including senior directors to an Executive Team, Leadership Team and Programmatic/Operations to develop Learning Communities with an overall goal of transforming from its informal sense as a “Super SEA” to a learning organization.

### **Problem**

The context reflects an organization undergoing change, both voluntary and involuntary. Budgets, staffing, and structural changes are challenging under the best of times and are made all the more complex in the uncertainty of the external political environment. The proud history and influence of the organization has been tied to marquee initiatives, but an absence of external factors (with the exception of recent NAEP results) to rally around presents a challenge of organizational identity, mission, purpose, and vision. CCSSO’s mission and core values were crafted under circumstances that seem to lack a galvanizing vision and purpose. Three versions of the mission statement appear in external and internal documents; the core values date to 2017, and the organization is missing a vision statement.

### **Recommendations**

The move to a learning organization is commendable, forward-thinking, and ultimately aligns CCSSO with management recommendations from MIT Sloan School of Management, Harvard Business School, and the Center for Public Leadership at Harvard Kennedy School of Government. Creating a new strategic plan is a mix of technical and adaptive challenges. For example, writing a new preface for the strategic plan is a technical task; creating the vision, mission, and purpose to ground it is adaptive work. The current changes are an opportunity to blend the work of learning communities with the work of creating a new strategic plan grounded in refreshed mission, vision, and purpose, which will positively affect culture and potentially attract new funders and partners.

Specifically, over the next six months, this proposed effort includes:

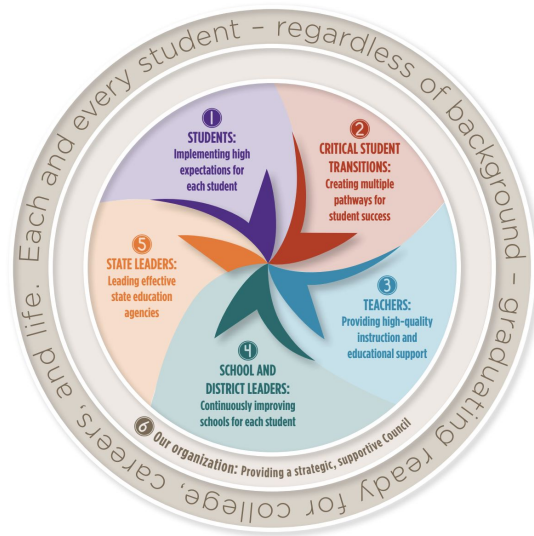
In consultation with Equity team, plan learning team meetings as a container for adaptive work using equity of voice principles and theories from Peter Senge (The Fifth Discipline), Ronald Heifetz (Leadership On the Line) Chris Argyris (On Organizational Learning), Amy Edmondson (The Fearless Organization), and John Kotter (Leading Change). Actionable summaries and a theory casebook will be created for all members of the Executive Team.

In consultation with the Development team, plan for teams to consider the questions: What business are we in? Who are our clients? Teams will concurrently generate agreements for working together as the first activities as a learning organization. These will be revisited and revised as necessary in each team meeting. From resulting conversations, take notes, synthesize emerging thinking and report at All Hands.

Executive team advises and guides next steps as learning teams then consider this information to begin drafting mission, vision, and purpose statements. Notes and synthesis then reported in another All Hands with drafts ready for commentary, revision and working draft.

Use working draft of these statements to begin drafting a strategic plan grounded in shared vision among teams.

## Appendix F: Selected Excerpts of CCSSO's Strategic Plan



### CCSSO Strategic Plan,

#### 2017-2020

“Achieving educational equity requires a focus on both system inputs and outcomes. An adequate distribution of funding, access to high-quality teachers, rigorous coursework, support services, supportive school climates, technology access, and extracurricular opportunities all play a role in a student’s experience at school. Educational equity realized through providing students with meaningful diplomas, successful career

opportunities, and access to college enrollment and completion are paramount to a strong economy and informed democracy. Chiefs bring together diverse constituencies to pursue high quality educational opportunities to improve learning outcomes for all students. And as the national, nonpartisan organization representing all state chiefs, CCSSO is committed to the following areas of work in service of chiefs, their agencies, and children across the nation.

The July 2017-June 2020 CCSSO strategic plan focuses on:

1. Students: Implementing high expectations for each student
2. Critical student transitions: Creating multiple pathways for student success
3. Teachers: Providing high-quality instruction and educational support
4. School and district leaders: Continuously improving schools for each student
5. State leaders: Leading effective state education agencies
6. Our organization: Providing a strategic, supportive Council”

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        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| <p><b>Goal 1: Students</b></p> <p><b>States set high expectations for student success by creating opportunities and removing barriers</b><br/> <i>Advances equity commitment #1, #2, #3, and #7</i></p> <p>Setting high expectations, ensuring appropriate supports, assessing whether those expectations are met, and designing and administering accountability systems are core state responsibilities. These levers must be designed with the intention of informing and improving the teaching and learning experience. Standards can articulate, clearly and transparently, what each student needs to know and be able to do. Assessments give students, parents, and teachers insights on students' progress toward meeting or exceeding the standards. Accountability systems provide necessary data that enable state leaders to better target support to close opportunity gaps and improve outcomes for all students. States have an important role in monitoring and oversight of equitable implementation of standards and assessments and ensuring their accountability systems are transparent and meaningful for stakeholders. States have the responsibility to leverage these foundational functions to improve the capacity of districts, schools, and teachers to ensure high expectations for each and every student. That requires an active state role in identifying problems of practice, designing supportive and solutions-oriented programs and policies, and ensuring greater transparency at the state, district, school, and community levels. <b>Therefore, CCSSO will support states as they...</b></p> <ol style="list-style-type: none"> <li><b>1.1 Implement College- and Career-ready (CCR) Standards:</b> Improve the capacity of districts, schools, and teachers to implement standards with fidelity and ensure that high quality, standards-aligned curriculum frameworks, instructional resources, and professional development are available to every teacher</li> <li><b>1.2 Ensure Each Student Benefits from CCR Expectations:</b> Support English learners (ELs) and students with disabilities (SWDs) to meet college- and career-ready standards through equitable access to rigorous courses, high-quality instructional resources, and appropriate supports</li> <li><b>1.3 Implement Assessment Systems:</b> Establish and deliver valid and reliable assessment systems that inform student learning and provide equitable access and opportunity for diverse learners, including ELs and SWDs</li> <li><b>1.4 Leverage Accountability Systems:</b> Design and implement accountability and transparent reporting systems that measure what matters and drive student success in K-12 and beyond</li> </ol> | <p><b>Goal 2: Critical Student Transitions</b></p> <p><b>States create multiple pathways for each student to successfully transition into, through, and beyond the K-12 system</b><br/> <i>Advances equity commitment #1, #4, #6, #7, and #10</i></p> <p>A student's schooling experience is life-determining, and students must be supported at critical transition points as they enter into, advance throughout, and graduate from the K-12 system. These vital transition points within that experience are important for state, district, school, and community engagement and attention. States play a critical role in creating the structures and supports to help students enter kindergarten ready to learn and ultimately graduate high school ready for college, careers, and life. Meaningful partnerships with relevant state agencies, organizations, and institutions are required to ensure cohesive transitions from early childhood and to career and technical education, postsecondary systems (including two-year, four-year, and technical schools) and the military. At the same time, new paradigms of learning are changing the work and roles of teachers, putting students in charge of their own education, and democratizing access to high quality learning through internet-based tools and instruction. Harnessing these newer approaches and resources can help ensure multiple, effective, and seamless pathways into, through, and beyond the K-12 system and ultimately the quality of the student experience. <b>Therefore, CCSSO will support states as they...</b></p> <ol style="list-style-type: none"> <li><b>2.1 Manage Transitions into K-12:</b> Ensure access to high-quality, developmentally appropriate early childhood education that prepares students for pre-K and elementary school</li> <li><b>2.2 Provide Multiple Pathways within K-12:</b> Support and scale models of personalized, competency-based, anytime/anywhere learning pathways for students to attain college and career readiness</li> <li><b>2.3 Ensure Students are Career-ready:</b> Provide all students access to high-quality career pathways and opportunities that culminate in a credential, degree, or set of knowledge/skills that are highly-valued by the labor market</li> <li><b>2.4 Promote Seamless Transitions to Post-Secondary Education:</b> Make pathways available to each student to attend a two-year, four-year, or technical post-secondary school without remediation</li> </ol> |
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## Appendix G Structured Storytelling Meeting artifacts

### Meeting Agenda (Peoples' part = 40 minutes) 11/25/19, 2:00-3:30 p.m. Georgetown Conference Room

**Topic:** Overview of leadership teamwork within the strategic plan work

#### Attendees:

Carissa  
Monica  
Kirsten  
Margaret  
Olympia  
Peter  
Jennifer  
Renata  
Bryan  
Missy  
Shanna

**Facilitator:** Shanna

**Note taker:** Renata

**Timekeeper:** Bryan

**Meeting Objectives:**

- Present strategic plan work within teams
- Debrief strategy memo
- Discuss outcomes of team meetings: trial process for meetings
- Logistics: scheduling preferences

**To prepare for this meeting, please:**

- Read this agenda [*optional*: reply to Shanna with feedback by noon on 11/25]
- Read case memo + other uploads in Leadership Team Folder (includes background, MeetingWise template, example, video)

Schedule [40 minutes]

| TIME                 | MINUTES | ACTIVITY                                                                                                                                                                                             |
|----------------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tbd<br>X:XX-X:X<br>X | 5       | Check in and review objectives of this meeting and how they connect to the objectives for our remaining team meetings this year                                                                      |
|                      | 10      | Objective 1: Overview of strategic plan process/deck                                                                                                                                                 |
|                      | 15      | Objective 2: Strategy memo debrief                                                                                                                                                                   |
|                      | 3       | Objective 3: <ul style="list-style-type: none"><li>• Outcomes discussion:process</li><li>• Trial process for meetings - MeetingWise (examples from my HGSE team <a href="#">here</a> &amp;</li></ul> |

|      |       |                                                                                                                                                                                                        |      |       |   |   |
|------|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|-------|---|---|
|      |       | <a href="#">here</a> ) <ul style="list-style-type: none"><li>• Equity of voice</li><li>• Input/feedback collected in a Brain Trust document (example from my HGSE team <a href="#">here</a>)</li></ul> |      |       |   |   |
|      | 5     | Review next steps: <ol style="list-style-type: none"><li>1. Scheduling preferences - note to me</li><li>2. Consent agenda trial</li></ol>                                                              |      |       |   |   |
|      | 2-3   | Assess what worked well about this meeting and what we would have liked to change <table><tr><td>Plus</td><td>Delta</td></tr><tr><td>•</td><td>•</td></tr></table>                                     | Plus | Delta | • | • |
| Plus | Delta |                                                                                                                                                                                                        |      |       |   |   |
| •    | •     |                                                                                                                                                                                                        |      |       |   |   |

## Sample of Talking Points for Leadership

[please emphasize highlighted material]

Talking points:

- CCSSO is undergoing significant change, both voluntary and involuntary. In the past, the organization could use policies like Common Core and ESSA to drive its work, but in the absence of an external galvanizing initiative, CCSSO struggles with its identity, mission, vision, and purpose.
- This year, the board of directors questioned the current strategic plan, finding it too specific and verbose. They requested revisions to reflect a broader sense of CCSSO's work. Internally, leadership noted that the preface to the strategic plan describes a body of work for SEAs and does not communicate who CCSSO is or what it does or why.
- Currently, there are three versions of the organization's mission statement and no vision statement. This presents an opportunity for everyone at CCSSO to reflect on their own sense of the organizational mission and purpose.

- Leadership is inviting everyone to join in the work of creating a new mission and vision statement. This will be accomplished in work teams using the attached timeline.
- The theory of action for the team meetings is: If we spend time thinking about **what** we do, **how** we accomplish that, **who** we serve, and **why** we exist, then we will be able to draft mission and vision statements that will guide more authentic strategy and coherent work.
- **What is a mission statement?** Focuses on what we do now, for who, and how we accomplish it  
*Example from Google for Education: To help expand learning for everyone*  
**What is a vision statement?** Focuses on the problem we want to solve for the greater good and/or the change we want to inspire  
*Example from CZI: A future for everyone*
- **What do you need from me?** Please attend the meeting and bring your answers to these two questions:  
 When people ask you what CCSSO is, how do you answer?  
 What is an example of a mission statement from an organization you've worked for or one from an organization you admire?
- **Why does this matter?** This process will guide a new strategic plan and is itself an outcome. When we share a vision, we better understand how vital our individual work is, how to talk about that with not only each other, but also those outside CCSSO, and allows us to feel like we are part of something meaningful. In the discomfort of change, a shared mission and vision helps us all row in the same direction towards the same destination.

**Timeline** (Rough and subject to revision)

Dec/Jan: all teams meet at least once to discuss and collect ideas

Feb/Mar: All-staff meeting to refine ideas and draft a mission and vision

April: Begin revision of preface for new strategic plan that expands on the mission and vision

May/June: Drafting new strategic plan

**Sample slides from deck used in meetings**

| Check In & Overview of Objectives<br>15 Minutes                                                                                                                                                  | Everyone Share Answers<br>15 minutes                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>What's good/what's up?</p> <p>OVERVIEW:</p> <p>Engage in conversation about what CCSSO does, for who and why</p> <p>Norms/agreements</p> <p>Examples from everyone</p> <p>Share responses</p> | <p>When people ask you what CCSSO is, how do you answer?</p> <p>What do you notice about the responses?</p> <p>Do you think others would agree?</p> |

## Appendix H Anonymous Feedback on Mission and Process

### Internal Response Patterns to Question of Organizational Identity

|           |                                                                                                                                                                              |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>I1</b> | "It's very difficult to explain what we do back home with my parents and family. They don't get what a policy organization does. They understand a membership organization." |
| <b>I2</b> | "I say, 'the head of the public schools in [our state] is one of our members. We have members across the state and try to support them.'"                                    |
| <b>I3</b> | "We're a non-partisan education nonprofit that helps state education agencies support students within their states. Then I go into detail on what state agencies are."       |
| <b>I4</b> | "We bring state-level leadership together to share and learn from each other."                                                                                               |
| <b>I5</b> | "I struggle with how to describe our members. I say that we're a nonprofit that supports state leaders to support equitable outcomes for students."                          |
| <b>I6</b> | "A key stakeholder with education policy with Congress."                                                                                                                     |
| <b>I7</b> | "An organization that supports public schools. Then I go into detail of                                                                                                      |

|            |                                                                                                                                                                                                                                                                                  |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | who it is in that state.”                                                                                                                                                                                                                                                        |
| <b>I18</b> | “People know what a superintendent is, so I use that term instead of ‘chief.’ And then I say, ‘At CCSSO, we work with the superintendents of states to help put in place policy that they then go back to their states and implement. But then I always think, ‘Is that right?’” |
| <b>I19</b> | “The acronym is so long and requires saying the whole thing, then you have to explain what a ‘chief’ is, then you have to explain what a state education agency is.”                                                                                                             |
| <b>I10</b> | “I keep it simple: We focus on educational equity.”                                                                                                                                                                                                                              |
| <b>I11</b> | “I use National Teacher of the Year and talk about that because people know what that is.”                                                                                                                                                                                       |
| <b>I12</b> | “We serve kids by serving state chiefs.”                                                                                                                                                                                                                                         |
| <b>I13</b> | “We support the leaders who support kids.”                                                                                                                                                                                                                                       |
| <b>I14</b> | “We’re uniquely positioned to convene chiefs as the people who drive change. We support them and support their work.”                                                                                                                                                            |
| <b>I15</b> | “It depends on the audience. It’s either: ‘We’re a membership organization of key decision makers informed by policy decisions for kids, or ‘We’re a nonprofit focused on outcomes for kids through policy.”                                                                     |
| <b>I16</b> | “We’re the leading voice for education in the U.S.”                                                                                                                                                                                                                              |
| <b>I17</b> | “We inform the decisions that impact kids.”                                                                                                                                                                                                                                      |
| <b>I18</b> | “We’re the most influential membership organization in education.”                                                                                                                                                                                                               |
| <b>I19</b> | “It’s a membership organization that supports state education agencies and helps leaders of SEAs do a better job.”                                                                                                                                                               |
| <b>I20</b> | “I use Common Core and NTOY because people know them and I say that CCSSO is the nonpartisan group that works to make education better.”                                                                                                                                         |
| <b>I21</b> | “We advise and support federal and state education policy.”                                                                                                                                                                                                                      |
| <b>I22</b> | “We support state superintendents and give them the tools to support students.”                                                                                                                                                                                                  |
| <b>I23</b> | “We humanize the work of education leadership through advocacy, tools, and support.”                                                                                                                                                                                             |

|            |                                                                 |
|------------|-----------------------------------------------------------------|
| <b>I24</b> | "We're the membership organization of state education leaders." |
|------------|-----------------------------------------------------------------|

### External Responses to Question of Organizational Identity

|           |                                                                                                                                                                                                                                                                                                                                                           |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>E1</b> | "It's the organization that convenes and organizes other state chiefs and their staff at education agencies. It's the lead convener of not just individuals but ideas."                                                                                                                                                                                   |
| <b>E2</b> | "The organization that guides and provides a framework for the work of state chiefs. There's no comparison - in terms of the support and the framework - that any other organization offers. In our jobs, it's really easy to lose sight of kids, but CCSSO keeps equity and kids at the forefront and brings it back to kids in the mission."            |
| <b>E3</b> | "Dedicated to improving functional leadership in state education agencies. It convenes and facilitates this for more than just chiefs, which is what drives improvement."                                                                                                                                                                                 |
| <b>E4</b> | "The premier organization that represents state education chiefs on all matters related to education. CCSSO drives consensus on policy among chiefs. Being the convener allows all kinds of stakeholders to meet with chiefs and get their input on all kinds of topics."                                                                                 |
| <b>E5</b> | "A place for leaders to get better and for all of us to work to create better policy on behalf of children."                                                                                                                                                                                                                                              |
| <b>E6</b> | "A voice of support and direction for its members that's targeted and intentional for collective action - not just in D.C. but across the ecosystem in policy, practice, and legislation. It is uniquely positioned to understand each of its members' concerns at the state level and bring them together as a collective force around common concerns." |
| <b>E7</b> | "The strongest membership organization for education policymakers and it does a great job for chiefs. A convener and sharer of ideas between chiefs and deputies who need that network. In a world of constant turnover, CCSSO [is a stable network and influencer]."                                                                                     |

| Hopes                                                                                                                                                                                                               | Fears/Questions                                                                                                                               |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| "We can engage in true discussion about the work itself flowing into the vision and how to de-silo the organization in the process of strategic planning"                                                           | "It won't reflect what we do or I won't be able to 'stand' behind it"                                                                         |
| "That the entire organization will be included in the mission statement"                                                                                                                                            | "May take longer to iron out than we think"                                                                                                   |
| "That the mission can be short and sweet"                                                                                                                                                                           | "That nothing will change after this process and the current chaos will expand and ultimately negatively impact members"                      |
| "Would love to see one mission statement for CCSSO that is simple, short, and to the point"                                                                                                                         | "How do we maintain the focus on kids? Who will be included in drafting/approving the ultimate vision and focus?"                             |
| "That all departments/teams will agree and understand who we are and who we serve: State members versus corporate members"                                                                                          | "My work will be left out of the mission"                                                                                                     |
| "To establish a common, pithy, easy-to-understand statement"                                                                                                                                                        | "We are becoming a 'pay to play' organization sponsored by corporations and forgetting our why"                                               |
| "I hope we can gain clarity on the work we are doing, as well as stability for our work. Right now, it feels like each staff member eats what they can kill rather than supporting some stable, overarching vision" | "How will Chief Equity Officer and/or Director of Equity Initiatives be utilized to ensure embedding of language with a social justice lens?" |
| "We can build more meaningful work for staff. I want to get my hands dirty with analysis and build expertise. Right now, CCSSO are experts in knowing experts"                                                      | "Meaning of language, including word choice. Ensure common internal language."                                                                |
| "I hope we can stick to it"                                                                                                                                                                                         | "That we only make changes around the edges and don't actually then align how we work + what we do to the missional vision."                  |
| "More clarity around CCSSO's main focus"                                                                                                                                                                            | "Is it our CCSSO staff mission or the board mission? Fear: Once Shanna leaves this will die."                                                 |
| "The final statements fully reflect who CCSSO is and all lines up to that"                                                                                                                                          | "I am fearful that many staff don't have a good understanding of what we do/who we are/how we do it."                                         |
| "My hope is that this focus and refining of the mission will lead CCSSO to deter silos and stride toward true cohesion"                                                                                             |                                                                                                                                               |

|                                                                                                     |                                                                                                     |
|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| "I am hopeful that we'll have clarity around our mission."                                          |                                                                                                     |
| "Clearly defined and articulated: Who We Are, What We Do"                                           |                                                                                                     |
| "I hope a new mission can be simplified and powerful. Could we reconsider the term 'chief'?"        |                                                                                                     |
| "Clarity is provided to the staff and the field on who we are and what we do - and why it matters." |                                                                                                     |
| <b>Plus</b>                                                                                         | <b>Delta</b>                                                                                        |
| "Positive step to have this conversation"                                                           | "I didn't get to read the documents"                                                                |
| "Engaging and collaborative - thank you!"                                                           | "Lack of coherence around next steps and why we are not entering into a strategic planning process" |
| "Time to share with the team, small size"                                                           | "Share materials earlier"                                                                           |
| "This seems like a great start to this conversation. Getting feedback from all staff is great"      |                                                                                                     |
| "What's up & what's good, good pacing"                                                              |                                                                                                     |
| "Glad that the Council did not use an outside consultant for this work"                             |                                                                                                     |
| "There are different ways to describe the work at CCSSO depending on the conversation"              |                                                                                                     |
| "It is good to accept input across the Council"                                                     |                                                                                                     |
| "Identified that there are multiple mission statements for the Council"                             |                                                                                                     |
| "ALL (all caps, underlined twice) of CCSSO working together to develop a revised mission/vision"    |                                                                                                     |
| "Being able to share voice"                                                                         |                                                                                                     |
| "I'm glad it's a team effort"                                                                       |                                                                                                     |

## Appendix I      Missional Descriptors from Organizational Documents

|                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Certificate of Incorporation</b><br>(1967) | <p>“The purposes for which the Corporation is formed and the business to be carried out and promoted are:</p> <ul style="list-style-type: none"> <li>(a) To engage in educational, professional, and civic activities, to the end that the members shall become more effective in the performance of their duties as the chief school officers, and to unite the members for their mutual benefits, improvement, and association</li> <li>(b) To engage in the continuous study of problems relating to school systems and their curricula and administration;</li> <li>(c) To assemble and disseminate information relating to the operation of school systems, their curricula and administration;</li> <li>(d) To cooperate with other public and private organizations and with Federal, state, and municipal agencies and international agencies responsible for educational activities assisting public education</li> <li>(e) Advance and protect the interests of public education in the U.S.A.”</li> </ul> |
| <b>Bylaws</b><br>(approved July 2019)         | <p>“CCSSO through leadership, advocacy, and service, assists chief state school officers and their organizations in achieving the vision of an American education system that enables all children to succeed in school, work, and life.”</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Form 990</b><br>(2007-present)             | <p>Same sentence as above in bylaws</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Form 990</b><br>(2005-2007)                | <p><u>Statement of Program Service Accomplishments:</u> “The Council, through Leadership, Advocacy, and Service, assists chief state school officers and their organizations in achieving the vision of an American education system that enables all children to succeed in school, work, and life. Additionally, the Council works to ensure that each child is prepared to succeed as a productive member of a democratic society.”</p> <p><u>Leadership</u><br/>“CCSSO sponsored over 40 events targeting primarily chiefs and SEA staff. Major meetings include the Summer Institute, the Annual Policy Forum, and the Legislative Conference. These events provide timely and relevant information, inform innovations in education, and guide states in building capacity.</p>                                                                                                                                                                                                                                |

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                        | <p>Our leadership focus is also supported by the National Teacher of the Year program and our relationship with other nonprofit and for-profit organizations.”</p> <p><u>Advocacy...</u></p> <p><u>Service...</u></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <p><b>Form 990</b><br/>(1997-2004)</p> | <p><u>Statement of Program Service Accomplishments:</u> “The Council creates and coordinates seminars, educational travel, and study programs that offer many opportunities for the professional growth and development of chief state school officers and their management teams. In addition to providing professional development opportunities for chief state school officers, the Council undertakes projects which address areas of concern at the state level and are designed to strengthen education through each state education agency. Research and resources developed by the Council are widely disseminated to chief state school officers and their state education agency staff.”</p> |
| <p><b>Website</b></p>                  | <p><u>Front page:</u> “Together, CCSSO and state chiefs are committed to each child - across all backgrounds - graduating ready for college, careers, and life.”</p> <p><u>“About” tab:</u> As an organization, we are committed to ensuring that all students participating in our public education system - regardless of background - graduate prepared for college, careers, and life. To realize this, CCSSO brings together dedicated leaders and exceptional ideas to achieve measurable progress for every student.</p>                                                                                                                                                                         |

## Appendix I

### Learning Officer/Director Role Description Proposal

100% FTE

**Description:** The Learning Officer/Director will work closely with the Executive Director to create and implement organizational learning grounded in adult development theory. The Learning Officer will develop CCSSO’s internal educational process, institute effective training strategies, promote the importance of learning and provide strategic leadership through the direction of large-scale change management and internal and external coherence in CCSSO’s mission and vision.

**Responsibilities:**

- Collaborate with the Executive Team to develop learning goals aligned with the strategic plan and strategic priorities.
- Reviews all professional development activities with the Chief Equity Officer to ensure that learning sessions are engaging, memorable, relevant, and equitable.
- Develop and implement an approach, tools, and processes that support organizational learning and metrics for tracking alignment with strategic plans and measures of success.
- Lead CCSSO's efforts to develop continuous improvement in organizational learning.
- Assist Human Resources with learning & development for on-boarding processes that are inclusive
- Actively engage in culture crafting with Communications Team by translating leadership vision and initiatives into easily consumable employee messages
- Increase and sustain employee engagement and participation, and lead collaborative dialogue across cross-functional teams.
- Trains internal leaders, members, and teams in public narrative for key organizational messaging
- Actively engage in story crafting to uncover, capture, and build storytelling assets for all organizational functions (e.g. marketing, leadership keynotes) and tailor consistent messaging for different audiences and strategic goals (e.g. Executive Director keynotes, Presidential keynotes)
- Act as a liaison to critical stakeholders including state chiefs and their staffs

**Key Qualifications:**

The Learning Officer/Director should possess the following professional qualifications and personal attributes:

- Significant experience in leading and supporting complex change in an organization
- Significant experience and/or background in teaching and learning of adults
- Strong knowledge of project management principles
- Strong interpersonal skills including excellent skills in public speaking, writing, presentation; and facilitation of conversations for various audiences and purposes
- Experience in strategic planning, strategy implementation, and continuous improvement
- Ability to handle multiple projects simultaneously: reliable and competent at prioritizing and adjusting timetables based on demand and circumstances

- Demonstrated ability to lead and develop others; executive coaching experience is preferred
- Experience in a role requiring a collaborative attitude and behavior in a complex organization and working with external organizations
- Proven ability to achieve results. Strong analytical and problem-solving skills. Possesses active sense of curiosity and proven ability to work with ambiguity.
- A passion for CCSSO's mission and desire to support the Council's work i

**Related skills:**

Ability to motivate others to accept and embrace new learning methods and technologies

Ability to break down existing silos to foster an atmosphere of cross-organizational cooperation and collaboration through learning

**Learning Fellow Project Proposal**

Scope of Work:

Year 1: Working closely with CCSSO Equity Team you will:

- Develop an understanding of CCSSO's mission, vision, and strategic plan, key stakeholders, programs, and major activities (e.g. Annual Policy Forum)
- Create protocols for CCSSO staff to learn and improve from data and problems of practice
- Determine criteria for, research, and report to internal leadership on the impact of organizational learning
- Create presentations to support internal messaging using organizational learning protocols
- Analyze key findings in staff development with a particular emphasis on equity impacts and recommend next steps and actions for Year 2.
- Conduct research and literature reviews, and assist with creating reports for CCSSO's key initiatives

Year 2:

- Develop a prototype and pilot a method for organizational learning
- Develop methods and approaches for capturing progress and impact data in the form of case studies for internal learning and improvement
- Create methods for sharing and displaying CCSSO impact data in equity to support thought leadership, grant applications, and general marketing purposes
- Report on findings through a variety of media in collaboration with Communications Team

**Impact:**

Through this Fellowship, you will have an opportunity to support CCSSO in learning and improving with equity at the center. Doing this within a national

organization will support the educational ecosystem in understanding the role of organizational learning to support equity and how CCSSO might provide technical assistance for SEAs interested in similar work. Additionally, the Fellow will have opportunities to develop and share findings with potential to impact the K12 public education sector.

**Supervisor: Chief Equity Officer**

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