

**Developing Human  
Capital to Improve Urban  
Education: Challenges and  
Opportunities**

**Deborah Daro  
Cheryl Smithgall  
Brianna English  
Anne Clary**

**2009**

school  
systems  
models

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Chapin Hall  
at the University of Chicago  
1313 East 60th Street  
Chicago, IL 60637

773-753-5900 (phone)  
773-753-5940 (fax)

[www.chapinhall.org](http://www.chapinhall.org)

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# Introduction

The W. Clement & Jessie V. Stone Foundation works to promote student achievement by fostering excellence among educators and educational administrators.

In the current policy context, there is increasing support for investment in education by both public organizations and private philanthropy. The Foundation currently supports 15 organizations that collectively represent innovative and promising aspects of urban school reform—the identification, training, and integration of teachers and principals with new approaches to the work and with the potential to alter organizational culture in schools and school districts in a manner that creates a new and powerful synergy that can improve student outcomes.

At present, the Foundation funds education leaders in four cities—Chicago, Boston, New York, and the San Francisco Bay area—and is therefore in a unique position to bring together for an engaging discussion a group of education leaders working with diverse populations and in complex environments. The Stone Foundation education grantees are not only grounded in research and theory; they are also implementers, involved in the application of serious education reform ideas in urban schools.

Convening these grantees offered an opportunity to explore in a timely and systematic way what they are learning and how these lessons inform future practice and policy opportunities. To promote their goal of peer learning, the Foundation asked Chapin Hall at the University of Chicago to convene a day-long meeting of this group to discuss the challenges and opportunities they face in implementing, improving, expanding, and sustaining their initiatives.

This document is a synthesis of the discussions that took place, highlighting the common themes that surfaced. By way of background, we briefly describe the grantees and the process that preceded the convening. We then discuss the common assumptions that guide the efforts of these organizations and how these assumptions influenced and shaped the discussions at the convening.

Discussions during the convening coalesced around several interrelated challenges that involve taking individual programs to scale; developing organizational capacity for sustainability of any new initiative; and the need for and obstacles inherent in evaluating new programs. The grantees all recognized that confronting each of these challenges both requires and relies on meaningful systemic change, which is a central goal of their programs.

Although the meeting did not generate definitive answers to these questions, the discourse did provide important lessons for effectively and efficiently taking promising innovations to scale. And, as noted in our concluding section, this convening is best understood as an initial attempt on the part of the Foundation to engage this group of grantees in an ongoing discussion around their efforts to improve their practice and enhance the impacts of their efforts. As documented in a survey Chapin Hall conducted following the convening, several of the discussions initiated during the meeting continued once the grantees returned home. In recognition of the value such exchanges have both in terms of improving the performance of individual grantees and in enhancing the capacity of these grantees to have collective impacts on the quality of urban education, the Foundation is currently considering a range of strategies to sustain and deepen these opportunities for peer learning and knowledge development.

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# Description of Grantees and Project

The day-long meeting of Stone Foundation education grantees was intended to provide an opportunity for participants to discuss the challenges and opportunities they face in implementing, improving, expanding, and sustaining their initiatives. Prior to the convening, Chapin Hall staff had individual conversations with representatives of the grantee organizations to identify issues most salient to each grantee, and in consultation with an advisory board, used their suggestions to craft the day's agenda (see Appendix B). The convening included a panel presentation, peer-to-peer case-study consultation, and small-group discussions on several self-identified topics of interest.

On the day of the convening, 27 education leaders representing 15 organizations were in attendance (see Appendix A). All of the grantees support a range of activities designed to enhance the quality of the teachers and principals who staff urban schools. These 15 organizations are leaders in urban education, working primarily in four cities—Chicago, Boston, New York, and the San Francisco Bay area. They are grounded in research and theory, they work with diverse populations in complex urban education environments, and they are invested in developing the next generation of education leaders. As such, they are in a unique position to move the field forward in the application of innovative education reform ideas in urban schools.

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# Grantees' Assumptions about Their Work

All of the grantees share a common belief that educational outcomes for children in urban schools can be improved through explicit efforts that target teacher and principal performance and school culture. Transforming urban public education, however, requires that innovations such as those promoted by the grantees be replicated within an increasing number of schools and school districts. Although replication and spread of the innovation is a desired objective, it is equally important to ensure that these innovations are replicated with fidelity and high quality. Throughout the day-long meeting, the grantees discussed the tension between scaling up and quality and how they might use the strategy of continuous program improvement to mitigate this tension. In addition, they identified a number of specific barriers each of them face in extending their work, including their lack of internal organizational capacity, the difficulty of monitoring impacts, and the experience of "gravitational pull" — the seemingly natural tendency of both individuals and institutions to resist change.

Although the programs and approaches of each grantee organization differ, they share core assumptions, largely related to the training of both teachers and principals:

- The quality of *instruction* matters to student achievement, and teacher training is inextricably linked to teaching quality. There is a need for alternative approaches as well as traditional university programs to training both school leaders and teachers.
- Good *leadership in schools* is important to teaching quality, and leaders increasingly need specialized skills to influence instruction effectively.
- Reform initiatives must recognize that the bureaucratic structure, values, and operating principles that currently govern the management of urban education systems also need reform if higher-quality instruction and better leadership is to result in optimal outcomes for students.

The topic of leadership permeated the day's discussion. Grantees saw leadership as a critical component of systemic change and of the three interrelated challenges of bringing innovations to scale, building organizational capacity, and assessing the quality and impacts of specific activities (i.e., evaluation). Those attending the convening focused on leadership at all levels; they described classroom teachers, teaching coaches, principals and district-level administrators all as *leaders* whose approaches to innovation and education reform were central in achieving success and sustainability.

There were striking commonalities among the grantees with respect to their approaches to training and support of teachers and leaders. Their approaches tend to be intensive, closely connected to real problems in the workplace, and long term. In addition, grantees are making concerted efforts to integrate and/or connect their work to policy and practice reforms within the field of education more broadly.

Many grantees envisioned developing a different kind of leadership capacity among teachers and principals. Rather than leaders who work in a traditional hierarchical system, these grantees work to develop leaders to do the following:

- explore the individual competencies and organizational capacities necessary to effect change
- value inclusive processes, mindful of diverse communities
- acknowledge that individuals—both those with and without formal authority—can expand the boundaries of leadership
- create and support a culture of learning at all levels of the education system as well as within their own organizations

Leadership is especially critical when bringing an innovation or reform to scale. Schools are barraged with new programs and ideas. It is the school leader who must choose among reforms and must often weave together multiple reforms into a coherent whole.

In a sense, the efforts of these organizations are designed to challenge and develop adults just as the adults are challenging the students. Their shared expectation is that teachers, principals, and other leaders will be better prepared to support authentic, ambitious learning if they experience it in their own professional training.

The grantees all were acutely aware of the need to confront systemic issues if their reforms were to be sustainable and capable of achieving the desired impact. Although they operate at different levels and in different spheres, the grantees share a fundamental understanding of the importance of embedding any particular initiative within a *context* that fully supports its implementation. They understood that reforms could be implemented in two fundamental ways: they could be focused on changing people within a system who would then bring about system-wide change, or they could be directed at changing the system so as to improve the performance of individuals within it. Although there is not robust empirical evidence favoring one of these strategies over the other, most reformers have focused on strategically embedding leaders with a new approach to service delivery or organizational mission within an institution as providing the easiest leverage for change. In the case of the Stone grantees, most of their innovations are built around the belief that training teachers and principals in new ways of practice can indeed influence organizational culture, although achieving such change is far from certain.

Grantees sought to create environments that are dynamic rather than static. They recognized that large systems, especially, can exert a kind of gravitational pull away from change and reform and back to traditional teaching methods and ways of learning. Grantees work against this tendency by making trainees aware of this threat and building within the school a leadership team more receptive to change.

They spoke of the challenge inherent in the pressures to react to seemingly constant district-initiated changes while simultaneously trying to create change at the district level:

We are not asked for input as new district policy is developed and implemented. This leads to policies which are not always as coherent as they could be and forces us to be reactive as opposed to focusing more deeply on the effectiveness of our school improvement efforts.

...managing district-wide changes, what changes the district is going through and how our programs are a part of that change. The core element of human capital is a strategy for change in the district.

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# Meeting the Challenges of Innovation

There are three issues that the grantees identified as challenges in improving their impact:

- the challenges of taking individual programs to scale
- meeting needs for organizational capacity and development in order to implement reforms, and
- undertaking meaningful assessment and evaluation of educational reform efforts.

In the next sections, we will explore these issues, drawing on comments made by the participants, with a goal of illuminating lessons for the field and strategies for continuing to move this work forward.

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## Going to Scale

As noted in the introduction, all of the grantees struggle with the challenge of replicating and spreading their innovations at a pace that ensures quality and fidelity. They understood that in order to achieve system change, they would need to expose more people to their vision and ideas. However, the problem with simply “doing more” is that organizational and resource barriers often exist in being able to engage additional teachers, schools, and school districts with the level of quality needed to maximize impact.

As participants discussed their individual programs, each spoke of the challenges in taking their program to scale—efforts to achieve breadth at a rate that does not compromise the program quality. Those issues included how to expand programs, initiatives, and innovations and how to replicate them. In the view of some participants, the only way for a small nonprofit to get bigger is to work in more sites—that is, to roll out the model in order to generate revenue to fuel

organizational expansion with growth perhaps taking precedence over quality. Other participants were determined to proceed only at a rate that would not compromise quality or exhaust their staff.

Despite the different definitions and viewpoints held by the grantees, much discussion centered on model fidelity and on the human capacity that is needed for effective and sustainable change, as well as the funding needed to support that change.

Although participants used different language and emphasized different aspects of the idea of scale, there was universal agreement that their efforts needed to expand their reach as widely as possible. According to one,

If you don't work on replication potential, you will have islands of success and that is not systematic.

Participants spoke of scale as replication of programs, as expansion of programs, and as knowledge *diffusion*. They also saw increased depth of understanding about how an initiative works as a key component of going to scale. According to one,

If we have a goal to enhance student achievement and it's pushed by funding, scale usually means breadth, not quality. One question becomes, how do you move the district? It could lead to closing down thinking about diffusing knowledge because you want credit for what you've created. Scale can be diffusion in an organization, not replication. Here's the knowledge to build a critical mass within a system.

Some participants recognized an inherent tension that can occur when external funding represents a "push" toward expansion potentially at the cost of deeper understanding of how an initiative is working and how it might be improved. Issues of funding are inextricably bound up with issues around transfer of ownership and sustainability.

There is a limited universe of private dollars to support teacher and principal training so the resources needed to expand such training at a broad level must be funded by the public sector if such efforts are to be sustainable.

As nonprofit organizations take a program to scale, they are looking for the transition from private to public sources. Excelling schools create a demand for their services. Innovation is also their visionary work. They want to be the innovation shop, funding the innovations that

schools are doing, refining them, and adapting them for others. ...If the innovation works, getting the system to adopt/adapt it and move it out.

Underpinning the discussion was the understanding that bringing any individual program to scale involves grappling with program quality and fidelity, sustainability, human capital development, and funding. Although the process of expanding innovation is difficult, all of the grantees believe such expansion is essential if children are to have enhanced learning environments. No one presented a formula for accomplishing this goal, but many participants reflected on the concerns and principles that drive their efforts to go to scale.

... We have [a] moral obligation to be proactive, to do what needs to happen to help poor kids in urban schools. Be mindful of what we say yes to and what to say no to. ... Think about it in terms of high-quality work in districts in which the conditions are right. Quality trumps all, but [there is a] sense of urgency to get the knowledge out there to help as many kids as possible.

Our organization will not grow for the sake of growing. If we know that schools are failing, then there is still work to do. We are morally obligated if these children are not acquiring the skills, practices, and dispositions that they need. If you can show no difference for having been there, you have no right to be there.

Bringing programs and initiatives to scale is related closely to ideas about human and organizational capacity.

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## **Organizational Capacity, Development, and Sustainability**

Working for systemic change and bringing innovative programs to scale carry substantial implications for each grantee's organizational capacity, centering on the available human capacity to do the work and on the management of the organization. Strong organizations have leadership, skilled staff, a strong board, and an infrastructure that can support the work and the growth opportunities. Many organizations struggle with how they assure the growth of the organization just as they assure growth in the work—while sustaining the quality of both the organization and the work. Successfully negotiating these tensions is critical. Several of the grantees noted that their ability to expand their organizational capacity is limited by the number of individuals they can identify and train to do the work.

Internal human capital [is a challenge]—that is, finding the right individuals to work within the organization—those who have an intersection of experience and can operate at different levels (i.e., engage teachers AND state board of ed AND policymakers).

When you go to scale, you have to use talent as a constraint. We try to grow talent from within our organization.

It became clear that those human capital resources were key facilitators of, or constraints on, their efforts to spread innovation.

Grantees also discussed the bidirectional relationship between funding opportunities and organizational capacity. Some spoke of challenges early in the life of their organization in which they needed to allocate so much of their time to securing funding and managing operations that they dedicated few resources (time or money) to organizational development. Others discussed how rapid growth of their organization—some actually doubling in size within a few years—posed a challenge in that they were

...not big enough to hire HR or tech staff, [yet] too big for \$20k grants.

Thus, grantees are simultaneously using organizational resources to secure funding to support the innovative work and drawing on the work to make the case for funding—and growing—the organization. That being said, grantees were cautious about creative and sometimes opportunistic fundraising, which also poses challenges. One participant spoke of their efforts to avoid *mission drift* raising the question:

How do organizations seek out and obtain funding and still stay true to their mission, not adapting their mission to fit an RFP.

Finally, many of the grantees' organizations had been in existence long enough to be thinking about the next generation of organizational leaders and the need for a succession plan.

We are seeing that our staff members are great at what they do, but they do not necessarily have the capacity to be next in line for leadership [within our organization].

Succession plans are never too early to create in setting up the bench for distributed leadership. We have 10 staff. We bring in educators and others, but it is difficult to find those with the right mix.

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## Data and Evaluation

In a recent essay advocating for education R&D, Bryk (2009) writes:

That a practice, program, or service *can* work is of little value unless we discern *how to make it work* at scale in the hands of many different individuals working under diverse circumstances.<sup>1</sup>

As states and federal agencies underscore the importance of limiting their investments to evidence-based or evidence-informed practices, those developing innovations are under increased pressure to develop strong, empirical evidence of their effectiveness and efficacy. Although the grantees recognized this issue and its importance, they had a difficult time moving their thinking forward during the one-hour afternoon session devoted to this topic during the convening. Several grantees articulated a very concrete need for data tools that can drive internal improvement—that is, tools for working with data that yield timely results and actionable steps for making changes. As one grantee notes: “Data reports from previous tests barely arrive in time before we are required to administer the next test.” As the conversation evolved, at least three participants mentioned that they were either developing their own software tools or contracting externally for this type of product. Each of these efforts was occurring in isolation from the others, leaving the grantees feeling that they were expending resources on a product that might be more efficiently designed collaboratively. Efforts to foster collaboration across organizations might lead not only to a more prudent use of resources but also a final product that has greater utility to a broader group of organizations.

Although this issue and related evaluation concerns were discussed during the convening, in truth, none of the grantees were fully satisfied with their efforts in this domain. Considerable time was spent talking about the various dimensions of this conversation — internal vs. external data; program evaluation vs. data-based decision making; accountability vs. practice improvement. In the end, little consensus was achieved except on the fact that this was a critical issue that warranted further discussion.

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<sup>1</sup> Bryk, Anthony. (2009). Support a Science of Performance Improvement. *Phi Delta Kappan*, Vol. 90, No. 08.

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# Conclusion

One of the most perplexing challenges in many organizational and institutional settings is creating opportunities for reflective practice. As such, the convening provided an important opportunity for the Stone Foundation's education grantees to engage in this type of collective reflection. Based on the feedback we received from the grantees, it is clear that they appreciated this opportunity and valued the time spent with their colleagues discussing the common challenges and opportunities they face in advancing their efforts. In addition, our post-convening survey identified several instances in which grantees have continued to share information and seek input from their colleagues when dealing with issues of scaling up innovation and organizational management. This commitment to collaboration and learning is particularly important given the current political interest in promoting urban school reform. As public and private investment in educational reform initiatives increase, all of the grantees have significant opportunities to expand their reach and impact. Maximizing these opportunities will require not only careful planning within their own organization but also continuous engagement and learning with their colleagues.

The one-day convening was a starting point for articulating and advancing grantees' collective knowledge. The experiences of the grantees both during and following the convening validate the idea that the candid exchange of information is empowering to programs as they seek to gain the most benefit from and to sustain their innovations. Given the success of the convening and the high level of interest in urban school reform, the Foundation will be exploring a number of ways to facilitate continued grantee collaboration and shared learning. While not a panacea or singular solution to the difficulties inherent in taking innovations to scale and building organizational capacity, forming and engaging in active peer learning networks represent an important approach for strengthening innovation and improving educational outcomes.

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# Appendix A – Participating Organizations and Attendees

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## **BOSTON**

### **Boston Plan for Excellence**

<http://www.bpe.org>

Ellen Guiney, Executive Director

Stephanie Sibley, Chief Program Officer

*The Boston Plan for Excellence provides support and resources to schools, as well as to the central district (Boston Public Schools). Their mission is to be a catalyst and support the Boston Public Schools in transforming instruction to improve the performance of every student. The Boston Plan tests new ideas that hold promise for accelerating improvements in schools and presses the district to look at its own policies and practices that slow reform.*

### **Boston Teacher Residency Project**

<http://www.bpe.org/btr>

Jesse Solomon, BTR Director

Hollie Freeman, BTR Field Director

*The Boston Teacher Residency Project is a rigorous, school-based urban teacher preparation program that falls under the Boston Plan for Excellence. The program is a joint initiative of the Boston Plan for Excellence and the Boston Public Schools, and is part of the BPS strategy to improve instruction in every classroom. The program is 13 months in duration and Teacher*

*Residents co-teach with a Mentor Teacher in a BPS classroom while taking graduate level coursework.*

### **Center for Collaborative Education**

<http://ccebos.org>

Dan French, Executive Director

Meg Anderson, Director, Principal Residency Network

*The Center for Collaborative Education provides coaching, professional development, advocacy and research toward the development of schools that nurture every student. The mission of the Center is to transform schools to ensure that all students succeed. CCE fulfills their mission in four primary ways: Building understanding in the larger public that innovative schools can increase opportunity and justice for every student; Creating effective models of urban education, direct redesign and leadership development; Providing on-site coaching, professional development and networking opportunities for educators; and Conducting research that documents school progress and student results.*

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## **CHICAGO**

### **Academy for Urban School Leadership**

<http://www.ausl-chicago.org>

Donald Feinstein, Executive Director

Michael Whitmore, Director of the Teacher Residency Program

*The Academy for Urban School Leadership is a teacher preparation and school management organization working with Chicago Public Schools to effect the transformation of underperforming schools. The organization's mission is to improve student achievement in Chicago Public Schools by preparing and retaining Chicago's next generation of exceptional teachers and school leaders. In addition, they transform chronically underperforming schools by*

*opening and managing CPS Turnaround Schools, capitalizing on the strengths of the pipeline of AUSL-trained teachers.*

### **Chicago Public Education Fund**

<http://www.cpef.org>

Amy Short, Chief Operating Officer

*The Chicago Public Education Fund is a venture capital fund for public education. They invest in well-managed, high-impact programs that improve school leadership and student achievement system-wide. The mission of the CPEF is to accelerate achievement for all Chicago public school students, especially the neediest, by building talented teams of principals and teachers. CPEF invests dollars and ideas in ventures promising excellent returns in improved school leadership and student achievement in CPS.*

### **Urban Teacher Residencies United**

<http://www.teacherresidencies.org>

Anissa Listak, Director

*The Urban Teacher Residency United (UTRU) is a national not-for-profit network of urban teacher preparation programs dedicated to accelerating student achievement through the training, support and retention of excellent urban teachers. The network was created in 2004, as an informal partnership between the Boston Teacher Residency Program, the Academy for Urban School Leadership and the Boettcher Teachers Program. Emerging from this initial partnership was a network designed to develop and support teacher residency programs nationwide.*

## **University of Chicago's Urban Education Institute**

<http://uei.uchicago.edu>

Tim Knowles, Executive Director

Linda Wing, Deputy Director

*The Urban Education Institute works to create knowledge and educational models to address the question of how to produce reliably excellent schools for the children growing up in urban America. UEI has four main components: Establish and sustain exemplary public schools pre-K-12<sup>th</sup> grade, via the four University charter schools on Chicago's South Side; Develop and support teachers and school leaders, through the Urban Teacher Education Program; Undertake rigorous research, through The Consortium on Chicago School Research, a nationally recognized center whose work has informed public policy and changed practice; and Innovate and share best practices, tools and ideas to improve teaching and learning, through a variety of programs.*

## **University of Illinois at Chicago's Center for School Leadership**

<http://education.uic.edu/uel-edd/>

Steve Tozer, Professor of Policy Studies

Shelby Cosner, Assistant Professor, Educational Policy Studies

*The University of Illinois at Chicago's Center for School Leadership runs an Urban Education Leadership Program which prepares school leaders to turn around underperforming schools through its new, innovative doctoral program. This program, an Ed.D. in Urban Education Leadership, was designed to develop principals and administrative educational leaders capable of transforming low-performing urban schools, systems, and entire districts.*

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## **NEW YORK**

### **Internationals Network for Public Schools**

<http://www.internationalsnps.org>

Claire Sylvan, Executive Director

Suzanne Timmer, Director of Development

*The Internationals Network supports and advocates as well as gathers resources for the network of International High Schools serving late English Language Learners. Support comes in the form of principal and teacher support, professional development, research and advocacy. The mission of the network is to provide quality education for recently arrived immigrant students by developing and networking small, public high schools.*

### **New Leaders for New Schools**

<http://nlns.org>

Mark Murphy, Executive Director of Leadership Development

Allison Wagner, Managing Director, NLNS Chicago

*New Leaders for New Schools provides a pathway for current and former educators to become outstanding principals of urban schools. Their mission is to ensure high academic achievement for every student by attracting and preparing outstanding leaders and supporting the performance of the urban public schools they lead. Since its inception in 2000, the organization has trained over 550 new leaders and spans nine cities nationwide.*

### **New Visions for Public Schools**

<http://www.newvisions.org>

Robert Hughes, President

Lili Brown, Vice President for External Affairs

*New Visions for Public Schools develops programs to build leadership, provides teachers incentives for exploring new ways to engage students, and strengthens schools, supporting innovative small schools. New Visions was founded in 1989 and is the largest education reform organization dedicated to improving the quality of education children receive in New York City's public schools. New Visions has helped create 122 small public schools since 1989.*

### **Replications, Inc.**

<http://www.replications.org>

John Elwell, Executive Director, President

Bob Lesser, VP of Operations & New School Development

*Replications, Inc. uses successful schools as a model to replicate and produce more successful schools in urban areas. Their mission is to offer superior educational opportunities to public school children who would otherwise be educated in poorly performing schools. In nine years, Replications has established twelve middle schools, four secondary schools and ten high schools for a total of twenty-six schools— two in Baltimore and twenty-four in New York City.*

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## **SAN FRANCISCO BAY AREA**

### **New Teacher Center**

<http://www.newteachercenter.org>

Ellen Moir, Executive Director

Janet Gless, Associate Director

*The New Teacher Center at the University of California, Santa Cruz is a national resource center focused on teacher and administrator induction. The organization supports new teachers in surviving in their early years and becoming skilled professionals. The Center has programs and services in teacher induction, school leadership, research, policy and products and services.*

## **Partners in School Innovation**

<http://www.partnersinschools.org>

Becky Crowe Hill, Executive Director

Rachel Scott, Director of Organizational Learning & Effectiveness

*Partners in School Innovation is a school improvement organization aimed at developing leaders and closing the achievement gap. The organization's mission is to enable public schools in low-income Bay Area communities, serving primarily students of color and English Language Learners, to achieve educational equity through school based reform. They aim to transform schools by working side-by-side with teachers, principals and district leaders to implement a continuous school improvement approach that improves teaching and leadership, and develops the schools' capacity to sustain long-term system change.*

## **WestEd**

<http://www.wested.org/cs/sli/print/docs/sli/home.htm>

Ruth Schoenbach, Project Director

*The Strategic Literacy Initiative is a professional development and research project of WestEd. The project serves middle and high school teachers and administrators, literacy coaches and teacher educators nationally, offering hands-on training to improve teaching effectiveness and motivate students to become more motivated and successful readers and writers. Since 1995, the Strategic Literacy Initiative has been engaged in creating research-based instructional solutions to the problem of low adolescent literacy.*

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# Appendix B – Meeting Agenda

**Stone Foundation  
Education Grantees Convening  
Wednesday October 29, 2008  
Hotel Intercontinental  
Exchange Room, 11<sup>th</sup> Floor  
Chicago, IL**

8 to 8:45 a.m. **Continental breakfast**

8:45 to 9:15 **Introductions/overview of the day**

- Stone Foundation Welcome – Sandra Treacy, *Executive Director W. Clement & Jessie V. Stone Foundation*
- Chapin Hall Welcome, Introduction of Chapin Hall staff and overview of the day – Deborah Daro, *Research Fellow, Chapin Hall*
- Introduction of grantee participants

9:15 to 10:15 **Panel Presentation: Swimming Against the Current – Leadership Challenges and Opportunities**

- Facilitator: Cheryl Smithgall, *Research Fellow, Chapin Hall*
- Jared Washington, *Principal, NKO Charter School*
- Virginia Vaske, *Leadership Coach, Chicago New Teacher Center*
- Mary Jo Tavormina, *Elementary Mathematics Manager, Chicago Public Schools*

Questions posed to the panel:

- Where and why have you found yourself experiencing “gravitational pull” or falling into “old habits” at the expense of promoting innovative practice?
- What leadership strategies are helpful in facilitating the use of an innovation within the context of "business as usual"?
- As someone committed to change, how do you continue to promote change when your direct supervisor is not fully on board?
- What is the “reality” of your experience — moving beyond the buzz words, what does leadership mean to you, what does best practice mean, what does success mean? What are your standards for success?

10:15 to 10:30 **Break**

10:30 to 12:30 **Group Discussion: Developing a “Mindset” or Culture to Resist “gravitational pull”**

*Deborah Daro*

- What strategies have you found helpful in avoiding “gravitational pull” in your own work? How are these strategies incorporated into the work you do with the teachers and principals you train?
- What is the appropriate sphere for teacher or principal led decision-making?
- What other supports are necessary to assist leaders in resisting gravitational pull?
- How do you promote and sustain leadership from any position within the school?

12:30 to 1:40 **Lunch (network time)**

1:40 to 2:45 **Small Group A**

**Leadership Case Study: Becky Crowe Hill, Partners in Social Innovation**

*Brianna English and Anne Clary (Chapin Hall)*

Suzanne Timmer	Tim Knowles
Mark Murphy	Amy Short
Hollie Freeman	Robert Hughes

**Going to Scale: Opportunities and Challenges in Expanding Your Reach**

*Deborah Daro, Aundra Saa Meroe, and Carolyn Saper (Chapin Hall)*

Lili Brown	Anissa Listak
Claire Sylvan	Donald Feinstein
John Elwell	Michael Whitmore
Ruth Schoenbach	Ellen Moir
Dan French	Janet Gless

**Evidence-Based Practice: Using Data to Improve Performance**

*Cheryl Smithgall and Joy Lesnick (Chapin Hall)*

Stephanie Sibley	Rachel Scott
Allison Wagner	Jesse Solomon
Bob Lesser	Meg Anderson
Ellen Guiney	Steve Tozer
Linda Wing	

2:45 to 3 **Break and Switch Groups**

3 to 4:15 **Small Group B**

**Challenges Encountered in and Strategies for Ensuring All Students Graduate Career and College Ready: Lili Brown and Bob Hughes, New Visions for Public Schools**

*Brianna English (Chapin Hall)*

Anissa Listak	Allison Wagner
Dan French	Tim Knowles
Stephanie Sibley	Ellen Guiney
Steve Tozer	Linda Wing

**Going to Scale: Opportunities and Challenges in Expanding Your Reach**

*Deborah Daro and Carolyn Saper (Chapin Hall)*

Suzanne Timmer  
Mark Murphy  
Becky Crowe Hill  
Robert Hughes

Rachel Scott  
Jesse Solomon  
Meg Anderson

**Organizational Development: Human Capital Needs and Succession Planning**

*Cheryl Smithgall and Aundra Saa Meroe (Chapin Hall)*

Claire Sylvan  
Bob Lesser  
Amy Short

John Elwell  
Ruth Schoenbach

**Evidence-Based Practice: Using Data to Improve Performance**

*Joy Lesnick and Anne Clary (Chapin Hall)*

Hollee Freeman  
Donald Feinstein  
Ellen Moir

Janet Gless  
Michael Whitmore

4:15 to 4:45 p.m. **Wrap Up**

- Review lessons learned/insights gleaned from small groups/large group discussions
- Review next steps with respect to survey which will be conducted in November 2008 (the purpose of which is to provide feedback on the content/logistics of the meeting, to offer examples of how the discussions have or might impact your work, and to provide Chapin Hall advice on the format/content of the report on the meeting.)
- Provide participants overview of how the report will develop. (We will circulate a draft outline as well as a draft document to all participants for comment and feedback in February-March, 2009. Report will be finalized and available on the Chapin Hall web site by May 2009.)

4:45 to 6 p.m. **Wine and Cheese**

**Living Room South, Above Eno**

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### **About Chapin Hall**

Established in 1985, Chapin Hall is an independent policy research center whose mission is to build knowledge that improves policies and programs for children and youth, families, and their communities.

Chapin Hall's areas of research include child maltreatment prevention, child welfare systems and foster care, youth justice, schools and their connections with social services and community organizations, early childhood initiatives, community change initiatives, workforce development, out-of-school time initiatives, economic supports for families, and child well-being indicators.

1313 East 60th Street  
Chicago, IL 60637

T: 773.256.5100  
F: 773.753.5940

[www.chapinhall.org](http://www.chapinhall.org)