L-103A: Thinking Strategically About Education Reform and Sectoral Change

Longfellow 228, Tuesday and Thursday, 2 – 4 p.m.
Professors: Jal Mehta (jal_mehta@gse.harvard.edu) and Elizabeth City (elizabeth_city@gse.harvard.edu)
Teaching fellows: Ola Friday (ola_friday@mail.harvard.edu), Christine Ortiz (cmo312@mail.harvard.edu)
Office hours (Mehta, Gutman 418): Sign up at: http://mehta-officehours.wikispaces.com
Office hours (City, Gutman 433): Sign up at: https://calendly.com/liz_city
TF Office hours TBD:

A Brief Note on What You Should Expect in this Course

This is a course about how to make educational change for the better. We are particularly, although not exclusively, interested in how to make change that goes beyond an individual classroom or school. This course will intentionally take an optimistic stance; many of the sessions will feature actors, from different positions in the sector, who have succeeded in moving the system in a positive direction. At the same time, we will use these positive examples to explore all of the very real challenges – political, institutional, organizational, psychological, and connected to issues of race, class, power, and history – that confront actors trying to make change in the educational space.

For each of the examples we explore, we will seek to surface the why, what, and how of educational change. The “why” relates to vision and purpose—any set of actions is grounded in an idea of what a preferable future state would look like, and why it would be better than what currently exists. The “what” is about the key elements of the actions – what policies, structures, systems, norms, and movements – are needed to achieve the outcomes you are seeking. And the “how” is about how you achieve those changes—how you manage the politics, move the people, and otherwise get things done. You could teach a course or more on any of these things, but we hope to at least introduce you to some of the major ideas in each of the domains.

The course is also going to feature a mix of theory and application. In terms of theory, we are going to center the course around one theoretical framework: problem, context, and solution. We will argue that any set of changes, whether it is trying to improve a district, build a social movement, or create a new product, are about fitting together a problem, a context, and a solution. In particular, developing a viable strategy is about defining a value proposition that aligns these different elements in a compelling way. Since we think that deep learning comes through practice and repetition, the course will feature 6 live cases, in which real actors will share a current dilemma and you will analyze that dilemma through the framework. We will also work these examples in class and give you individual feedback on your case memos. We hope that by the end of the semester to have sharpened your analytic skills in thinking about how to make educational change.

We will also introduce a variety of other theoretical tools—adaptive leadership, the strategic triangle, disruptive innovation, Kingdon’s theory of policymaking, ambidextrous organizations,
social movement theory—which will further complicate and extend the basic theoretical framework for the course. Each of these tools will be paired with a case in which it was used as a helpful frame for understanding or orienting action. We picked these theories based both on our experience in the world and on reports from previous cohorts of students of using them in their residencies and capstones, which gives us strong reason to think they will likely be helpful for you in the future.

More substantively, we have tried to pick a range of examples that both take on different educational issues and that embody different theories of change. Our rough arc is as follows. First, we begin with a short unit that explores the purposes of education, what kind of learning we want for whom, and where we are now. Second, we ask what it would take to achieve equity in school systems. We look at this in a district context, with respect to integration, and in the case of building a network of schools to generate consistent and reliable results. Third, we turn from improvement to innovation, asking how actors have managed to break the bonds of history and inertia and develop new approaches for a new century. Fourth and finally, we move to the questions of social change at the largest scale, looking at the ways in which social movements, professionalization projects, and law and public policy have sought to create large-scale change across jurisdictions.

Finally, we are also trying to strike a balance between developing a common language and frame of reference and enabling you to pursue your own individual interests in more depth and detail. To this end, in addition to the common work of the course, the final assignment will enable you to explore an educational issue that is of particular interest to you. See below for description of the Final Project.

As you may recall, Liz shared with you 8 domains of competency that we think Harvard Ed.L.D. graduates need as system-level leaders:

- Leading Action for Equity
- Leading Learning
- Developing Talent
- Navigating Politics
- Driving Change
- Managing Resources
- Managing Evidence
- Managing Oneself in the Context of Relationships

While the course touches on all of those domains, you will be most working on your skill and knowledge in: **Leading Action for Equity, Navigating Politics, and Driving Change.**
Course Expectations and Requirements:
The requirements for the course are: class participation and discussion board posts (20%), case analyses (50%), and final project (30%).

Please prepare not only by reading, but also by thinking about and connecting the readings, guided in part by questions we distribute in advance.

Attendance: This class will be run as a professional community, and you are expected to attend all classes. If you do miss a discussion class, you should send us a 2-page memo (double spaced) on the missed week’s readings over e-mail by the Friday following the class at 5 p.m. If you miss a case class, you should let us know in advance, but you do not need to write a memo, as you will still need to watch the video for that class and do the case analysis.

No laptops during discussion: We have found that class discussion is more intense and focused when students are not using their laptops. There may be times when during group work, laptops can be used; this will be signaled by the instructors. For classes with live cases, you can use your laptops to take notes, but your primary attention should be focused on the speaker.

Study groups: We strongly encourage (but do not require) you to form study groups to discuss the readings in advance of class, and the cases as you are working on them. Students in the past who have been in study groups have strongly recommended it.

Assignments

Class participation and discussion board posts: A large portion of this course will focus on understanding and thinking about how different authors have approached the questions we are considering. To aid in that thinking, you need to post on the course message board for at least 10 of the sessions. Each session we will ask you to post one quote from the session’s reading that was particularly meaningful to you, provide a rationale for your choice of this quote, and include one burning question that arose for you from the reading. It will then be your responsibility to comment on the postings from two other students that sparked your interest. If, in your comments on others’ postings you include some analysis, disagreement, or note that you have similar or opposing ideas, a livelier discussion will occur. The teaching team may also add comments to the discussion threads. Your regular submission is important and this assignment will contribute significantly to your final grade.

We hope that this will be a place for ongoing discussion, meaning that you can also start threads on topics that are of interest to you, and post after class as well as before. In an effort to create some concentration of posting, we ask that you post your initial quotation, comment, and burning questions before 10 p.m. the night before class. Comments on others can come after 10 p.m., and we ask those of you who can to try to post earlier in the evening so as to create opportunities for others to respond to your post.
Six case analysis memos (50%): The course will feature six live cases. Each speaker will present a strategic dilemma, which you will be expected to analyze using the problem-solution-context framework. These are expected to be finished products that we can share with the participants. Each memo will be no longer than 2 single-spaced pages. See the syllabus for due dates for the memos.

Completing the memos
- You need to complete all 6 case analysis memos. If you choose to “curate” the class’s complete set of cases (see below), you will earn a pass from one memo, and write 5 memos instead.
- You are welcome (and strongly encouraged!) to meet together to discuss the cases.
- The written work must be individual for four of the six memos. You have the option of collaborating after the first memo.
- You also have the option of completing one memo as an oral exam with Liz after the first memo. “Oral exam” is less scary than it sounds. In fact, in Liz’s admittedly biased view, it’s fun! We encourage you to try one.

Assessing the memos
- The case analyses will be carefully assessed by you and by the teaching team, according to a rubric we will share with you.
- Feedback will be returned to you within a week, unless otherwise noted.
- In calculating the final grade for the memos, we will drop the lowest grade.
- We are operating on a mastery model—you need to demonstrate mastery in each area of the rubric before the end of the semester, and the teaching team and your classmates will be valuable supports in doing so. You may resubmit memos for assessment and feedback by end of day December 11.

Curating case analyses
- To sign up for curating and for instructions about curating, please sign up on the L103A Curation Google Spreadsheet on the iSite (“Assignments” & “Other Resources”) [will be available by Case #1].
Final Project (30%): 

The final project offers an opportunity to a) explore an issue that you care about, and b) to apply and integrate a number of the key ideas from the course. We want this assignment to be something that matters to you, and potentially something that has a real-world client or audience.

There are two broad options for how you can tackle this assignment. Option 1 is essentially an extension of the memos that you have been writing throughout the course. Here you would find a real-world client, and would develop a problem/context/solution analysis for them. You could also write a policy analysis or set of policy recommendations for a policymaker or advocacy organization. The advantages of this option are that it directly builds upon the work you’ve done in the course, while allowing you to go deeper than is possible in our in-class cases. This kind of work also has potential for significant real-world impact.

Option 2 is that you co-author (with cohort colleagues) an edited book that outlines the authors’ visions of the needed steps to improve education. Here you would get together whoever wants to do a book together and each (or in pairs) develop chapters on what you wanted to write about. There would also be a more general introduction that linked them together and made the case for the book. You could have a lot of people working on one book, or you could work in smaller groups to do shorter books (i.e., fewer chapters) on more specific topics. Cohort 5 did a book last year, so you will be able to see what this looks like. The book would be self-published, but will be a physical entity and can be distributed widely if you so choose. The advantages of this choice are that it allows you to really research in depth something you care about, and helps you develop your voice and your writing as a leader.

Both options will proceed on the same timeline. As you will see in the details below, we ask that you tell us what you want to do by October 12th.

Option 1: Live Case, Deeper Dive

Why?
- To integrate, apply, and demonstrate your learning from the course
- To explore something you care about in depth
- To support real people in the field now

What?
- Develop a problem/context/solution analysis for something that matters to you in American preK-12 education
- Write a cogent and persuasive analysis (think of this as a longer live case memo)

How?
- One way to approach this is think about something you care about or are interested in exploring—could be a problem, could be a solution, could be a context—find an organization that is or could be interested in this, and develop a problem/context/solution analysis that suggests how they could make progress in this area. A variation of this approach is to develop a proposal to start your own organization to make progress in this area.
- Another way to approach this is to think about an organization or community you are interested in working with/supporting, and to ask them what they are struggling with or
excited about or generally would like help thinking through. From there, figure out a problem/context/solution analysis that is meaningful for the organization and suggest how they could make progress.

- Either way, this assignment will enable you to go into more depth on every dimension (problem, context, solution) than is possible in the live cases in the course.

**Option 2: Book (or Books): Where We Need to Go, How, and Why**

**Why?**
- To integrate, apply, and demonstrate your learning from the course
- To explore something you care about in depth
- To develop your voice as a leader
- To create a touchstone that you can go back to as your thinking develops in the years to come.

**What?**
- Develop a problem/context/solution analysis for something that matters to you in American preK-12 education (see below for some thoughts about how this differs from a live case memo)
- Write a book chapter

**How?**
- Decide what you want to explore. Your topic should a) of interest to you and b) have potential to help move the sector from here to there – e.g., early childhood education, college access, teacher quality, or whatever else you thought was important. Your chapter would likely mirror much of what we will do in class in various ways – explain the nature of the problem, describe what a better world would look like, assess which actors are best positioned to move us from here to there (and these need not only be policy actors; they might be non-profits, charter groups, for profits, social movements, etc.), and make an argument for what could happen in your chosen domain in both the short run and the long run to move the needle.
- You might also choose to have some chapters that are less about a topical issue (e.g. early childhood) and more about a theme or question that the sector faces. An example might be “how can the sector effectively marry innovation and improvement”? Or “how can we create racial justice in a country that is founded on racial inequality”? These are also critical questions for the sector to move forward, and so some people in the cohort may choose to devote efforts to these as well.
- Self-organize to have people who want to write book chapters figure out whether you’re doing one big book or smaller books. This has potential to get complicated on cohort dynamics, so be thoughtful and sensitive (i.e., let’s try not to have this feel like getting picked for the kickball team), and use the teaching team as a resource as needed. Remember that the book chapters don’t have to “go together” particularly well from the get-go—the threads and themes may emerge as you work on them.
- You’ll also need an Introduction and Conclusion, so figure out who is working on those (this potentially could be someone’s designated role, depending on how big the book is).
  - Introduction: An overall framing piece that lays out why this books is needed and what it offers.
  - Conclusion: So what? Implications for the co-authors and the sector.
Suggestions and requirements for both options:

Required: Interview at least 4 people in your domain (including at least two outside the particular organizational context you have chosen): This will be really helpful on a number of fronts: It will help to orient you to the current knowledge that is in people’s heads that is not written down; they will lead you to resources (books, reports, previous efforts to do these things that are helpful); it will give you a reason to meet other actors who will be helpful in working on issues you care about; and, it will begin to give you the kind of thick understanding you need to develop the kind of diagnosis and analysis you need to make progress in an area you care about. The Ed.L.D. Network is a rich resource for you. The teaching team can also make recommendations if you need some ideas about whom to talk with.

Recommended: Conduct at least 1 visit to the domain you are writing about: One of the most significant problems with change efforts in education is that they are not well enough attuned to the realities on the ground. One of the principles of design (which Jal teaches in another of his courses) is that it should be user-centered – it needs to be considerably informed by the challenges of real people who are trying to grapple with and solve these problems. To that end, we encourage you to go to the field and listen to real people about what their challenges are, what the opportunities are, and what the future might look like. We recognize that this will be challenging with your course schedule. This might happen in December, when your schedule is more flexible, or you might not be able to do a visit, but instead include the “user” perspective in your interviews.

Deadlines

Note that many of these deadlines fall on Mondays or Fridays even though class is on Tuesdays and Thursdays. You are responsible for keeping track of these deadlines. Materials should be submitted to the course dropbox by 5 p.m. on the day indicated.

- **By September 21st**, identify 3 people in the Ed.L.D. Network you want to talk with about an issue/idea/organization, and email them to set up a time to talk at the convening (or, if they’re not coming, to talk within the next 2 weeks)—post names of people in the course site Dropbox

- **By October 12th**, write one to two paragraphs describing what you’re interested in exploring/analyzing for your final project and why; if applicable, also describe anyone else in the cohort you will be working with.

- **By November 9**, complete at least 4 interviews and write a memo, summarizing what you learned. In a memo of about two single-spaced pages, tell us what you’ve learned: 1. What are the major problems? What is the evidence or data that supports these problems? 2. What solutions are emerging as promising? What evidence supports these solutions? 3. What context is relevant? 4. What are the major challenges in moving forward towards these solutions?
5. What frameworks from the course are helping you think about how to make real change happen?
6. What questions do you have at this point? What else do you want to understand better?
   o Include as an appendix whom you’ve talked to and where you’ve visited (Feedback will come from Jal and Liz by November 23rd.)

- **By December 2nd (at 5 p.m.):** Develop an initial draft. The teaching team will provide feedback. (Feedback will come from Jal and Liz by December 7th.)

- **By December 10th (at 5 p.m.):** Revise with Penultimate draft. This is your “we think/hope we’re done, but we know other people will help us make it better” version. We will ask you to share this with a small number of classmates for our workshop feedback session on December 11.

- **By December 18:** Final, final drafts due. Particularly if you choose the book(s) option, we know that the end can be the most time-consuming part. You don’t need to be on campus for this part, but you should plan to be revising this week, particularly if you chose the book option.

**Anticipated Questions**

*How long should it be?* In keeping with the discipline you have been practicing all semester on concise arguments, strength not length of argument is the goal here. That said, we want you to develop your argument more than you can do for the live case memos. We anticipate the papers/chapters will be about 15 pages, double-spaced. The analyses might be a little shorter; the chapters might be a little longer. That said, do what you need to make the argument.

*I think in PowerPoints (or movies, etc.)/and/or I want to practice a different communication skill. Can I use a format other than a written paper?* Propose it to the teaching team in writing (no more than a page) by November 10th.

*Can I work on this with someone else in the cohort or in a small group?* Absolutely. You can work together to produce one common final product. To maximize learning, we suggest that you stick with pairs or triads for a particular product (e.g., book chapter or deeper live case). As a rule of thumb, if you have two people, double the guidelines for a single person (i.e., interview double the people; produce a document roughly twice as long).

*How will I be assessed?* We will construct a rubric together in class by October 20. You will self-assess your work according to this rubric, and the teaching team will provide feedback as well.

*But wait! I’m still exploring. I’m not ready to commit to how I’m changing the world just yet. Can I still write a book chapter?* Yes! You are not trying to determine where you will focus your energy for the rest of your career here. You are trying to pursue something that’s of interest to you and that you’d like to explore and learn more about—and that you also think has potential to be of great benefit in the sector. Next semester, you’ll spend a lot more time thinking about what you individually want to focus on in your Sector Change Project. Use this as an opportunity to
explore, play, inquire, and collaborate. You also have the option of writing the chapter and not putting it in the published book.
**Required Books**


Note that you can get the books that are not from Harvard Education Press at the Coop; Harvard Education Press books you can buy directly from Harvard Education Press (at 8 Story Street) for a 40% discount.
Unit I: Purpose: What are Our Hopes for Learners and Why?

Essential questions:
- What are our hopes for our learners? What kind of people are we seeking to create?
- Specifically, what do those hopes imply for what should be happening in classrooms, schools, or other learning environments?
- Is the problem with our current system the distribution of good learning opportunities, or do we need to change the kind of schooling the majority of our students receive, or both?

Session 1: September 3rd: Purposes of Schooling


- Building Our Community I
  - Harkness method:
    - https://www.youtube.com/watch?v=FESrNzuUMDc

Session 2: September 8th: Where Are We Now?

- Basic skills and change over time
- Deeper learning/critical thinking,
- Bring your own data—bring two pieces of data that you think are important to consider when assembling a portrait of “where are we now” in American preK-12 education

Building our community II:


Session 3: September 10th: What Might Better Learning Look Like? (Note, class meets 1:00 – 3:00 p.m.).


Session 4: September 15th: Where Are We Now II: Digging Deeper on Race and Class


• Ta-Nehisi Coates (2015). Between the World and Me. New York: Spiegel & Grau (pp. 25-34). [iPa©]


• Linda Darling-Hammond, The Flat World and Education. New York: Teachers College Press. (pp. 27-65). [RT]
Session 5: September 17th: What Kind of Learning Do We Want II: Digging Deeper on Race and Class


Unit II: Equity: Building the Schools All Our Students Deserve

Essential questions:
- How would you build, at a system level, schools that give every child the education they deserve?
- What are the political, organizational, institutional, technical, racial, and historical barriers to achieving the above goal?
- How have actors successfully navigated those challenges to produce good education for all students?

District Perspectives

Session 6: September 22nd

- Montgomery County


Session 7: September 24th

- Case 1: District Change


Session 8: September 29th: Coherence, Contingency, and Portfolios

• Theory of action:
  

Recommended for those unfamiliar with portfolio districts:


Case 1 Memo Due to Course Dropbox by September 30th, 9 AM

Session 9: October 1st, Integration I (Note, class meets 10:30 – 12:30)

• Two perspectives on integration
  


• Integration on the ground
  


Session 10: October 6th: Integration II

• Integration II: A Deeper Dive into Policy and Politics
  


Session 11: October 8th

- **Case 2: Integration**

Session 12: October 13th

- Networked Approaches: Scaling Up I: Design and Implementation


**Case 2 Memo Due by October 14, 9 AM**

Session 13: October 15th

- Networked Approaches: Scaling Up II: Improvement and Sustainability
  - David Cohen, Donald Peurach, Joshua L. Glazer et al. *Improvement by Design* (Chicago: University of Chicago Press, 2013), chapters 4-6. [RT]


Session 14: October 20th

- **Case 3: Innovation**

**Unit 3: Innovation: Creating a Different Future**

Essential questions:
- In what ways does schooling of the future need to be different from schooling of the past?
- How would you build an enterprise that changed the game?

Session 15: October 22nd


  - Bonus video (find link to video as well as quotes below):
• Disruptive Innovation:

Session 16: October 27th

• Grant Lichtman, #Edjourney: A Roadmap to the Future of Education (San Francisco, Jossey Bass, 2014), chapters 8-10, 14. [RT]

• Isomorphism:

Case 3 Memo Due by October 28th, 9 a.m.

Session 17: October 29th: Innovation at Scale?

• Christine DeLeon, “From Seed to Scale: Building the Foundation to Personalize Learning in Denver Public Schools.” Doctor of Education Leadership Capstone, Harvard Graduate School of Education, 2013. All capstones can be accessed at: http://isites.harvard.edu/icb/icb.do?keyword=k71524&pageid=icb.page499145 (Christine is in cohort 2).


Unit 4: Social Change: Creating Large Scale Change Across Jurisdictions

Essential question:
• How can you spark change that goes past a single jurisdiction and moves across the sector?
Session 18: November 3rd: Policy


Session 19: November 5th: 7 Forces for Social Change

- Case 4: Seven Forces for Social Change

- 7 Forces for Social Change, Jal Mehta and Mark Moore, powerpoint to be distributed


Session 20: November 10th

- Case 5: Networks and scaling up


Case 4 Memo Due by November 11, 9AM

Session 21: November 12th: Professionalization I


Session 22: November 17th: Professionalization II

Session 23: November 19th: Social movements I


Case 5 Memo Due by November 20th at midnight

Session 24: November 24th: Social movements II (Note: Class meets 11-1)

• Nicole Magnusson, “Sparking a Social Movement for Change in Public Education.” In Sparks: Igniting Change for All Students, eds. Catherine Pozniak, Jessica Rose, and Mary Wall. Cambridge: Harvard Graduate School of Education, 2015.


Session 25: December 1st: “Expect and Accept No Closure,” but It’s Still the Last Regular Class (no readings!)

• Case 6: Professionalization

Case 6 Memo Due by December 9th, by 9 a.m.

Closing Session: December 11th (Note: Class meets 9 a.m. - 1 p.m.): Workshopping Final Projects