

Tips for Designing a Great Role

Your organization is competing for talent with other organizations across the country. Geography, organizational fit, and qualifications for a particular role/position all influence a Residency placement. Designing a highly attractive Resident position is a key component of this process.

The role, or proposed position, for a Resident should be designed so that a Resident can make an immediate impact and a positive long-term transition into the education sector.

- The proposed Resident role must have the support of senior leadership, be *central and connected* to the strategic priorities of the organization and ensure the Resident has the opportunity to make a positive long-term transition into the education sector:
 - To be competitive, the role should be designed to accelerate the Resident's development as a leader
 - The role must report to the Superintendent/CEO or another approved and appropriate senior executive in the organization and be positioned so the Resident can make significant contributions

Resident roles should meet the immediate needs of the organization **and** be developmental in nature. **The Residency role progression** graphic below provides some guidance about balancing immediate needs and development within a Resident role. Usually there is a percentage of time allocated to core responsibilities and developmental opportunities. An 80/20 split is a good rule-of-thumb.

Matching role with qualifications of candidates:

The Broad Residency recruits and selects strong project managers with experience in some functional areas (e.g human capital, strategy, finance or operations). Most Residents are "generalists" and have successfully operated in competitive industries for 7-15 years as professionals. They are

highly motivated as individuals, strong team contributors, capable project, initiative and program leaders. All have a strong record of accomplishment.

With this in mind, we recommend designing a role that is going to *attract* this type of individual and will capitalize on them as a high performer. You should consider designing a role that allows for:

- early success with support from and visibility to senior leadership
- increasing responsibility and ownership over time

Supports available to you while you design your position proposal:

- **Consultation and coaching** from Broad Center staff members – contact Mike Montoya mmontoya@broadcenter.org or Lesley Swain lswain@broadcenter.org to discuss possible role configurations you are considering. It is best to write down two or three ideas (1-2 sentences each), email them to us, and then we can discuss strengths of each idea. You'll receive feedback about how marketable and competitive your position proposal is and we'll make suggestions for improvement.
- **Peer conversations** with other organizational leaders who have worked with Broad Residents. Sometimes it is easier to discuss your ideas and organizational needs with someone who's in a similar position as yourself. We can connect you with a thinking partner at your request.
- **Webinar – Role Design** - We will be hosting a webinar on Wednesday 1/18/12 at 12noon Pacific Time. We will walk through some of the fundamentals and have a Q&A session about the overall application and placement process. Registration for this webinar will be available the week of January 9, 2012.

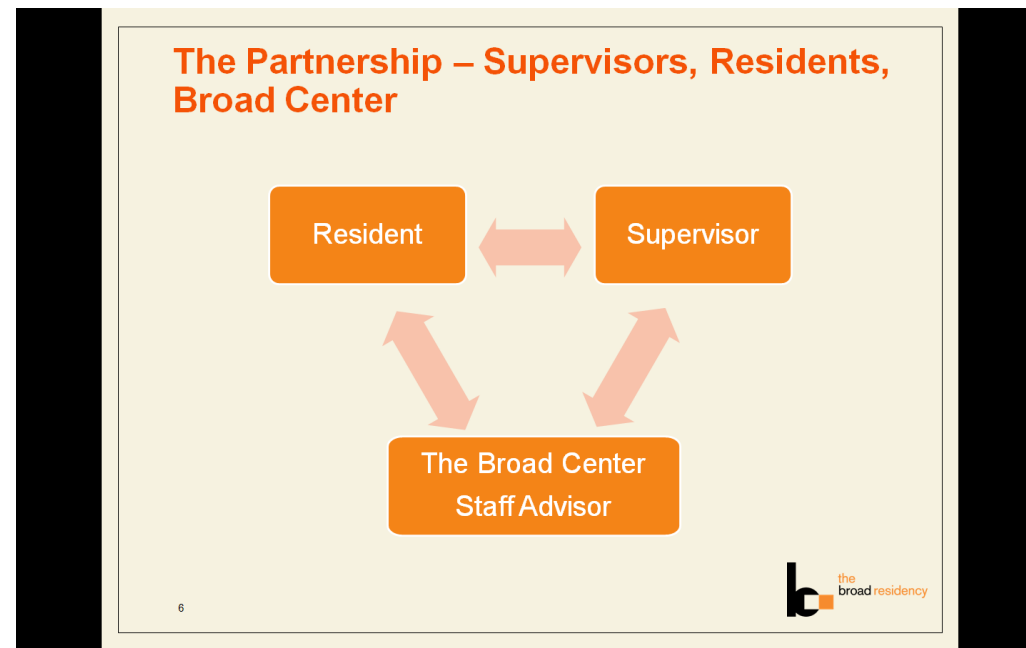
Full Partner Organization information can be found at

http://broadresidency.org/partners/partner_information.html

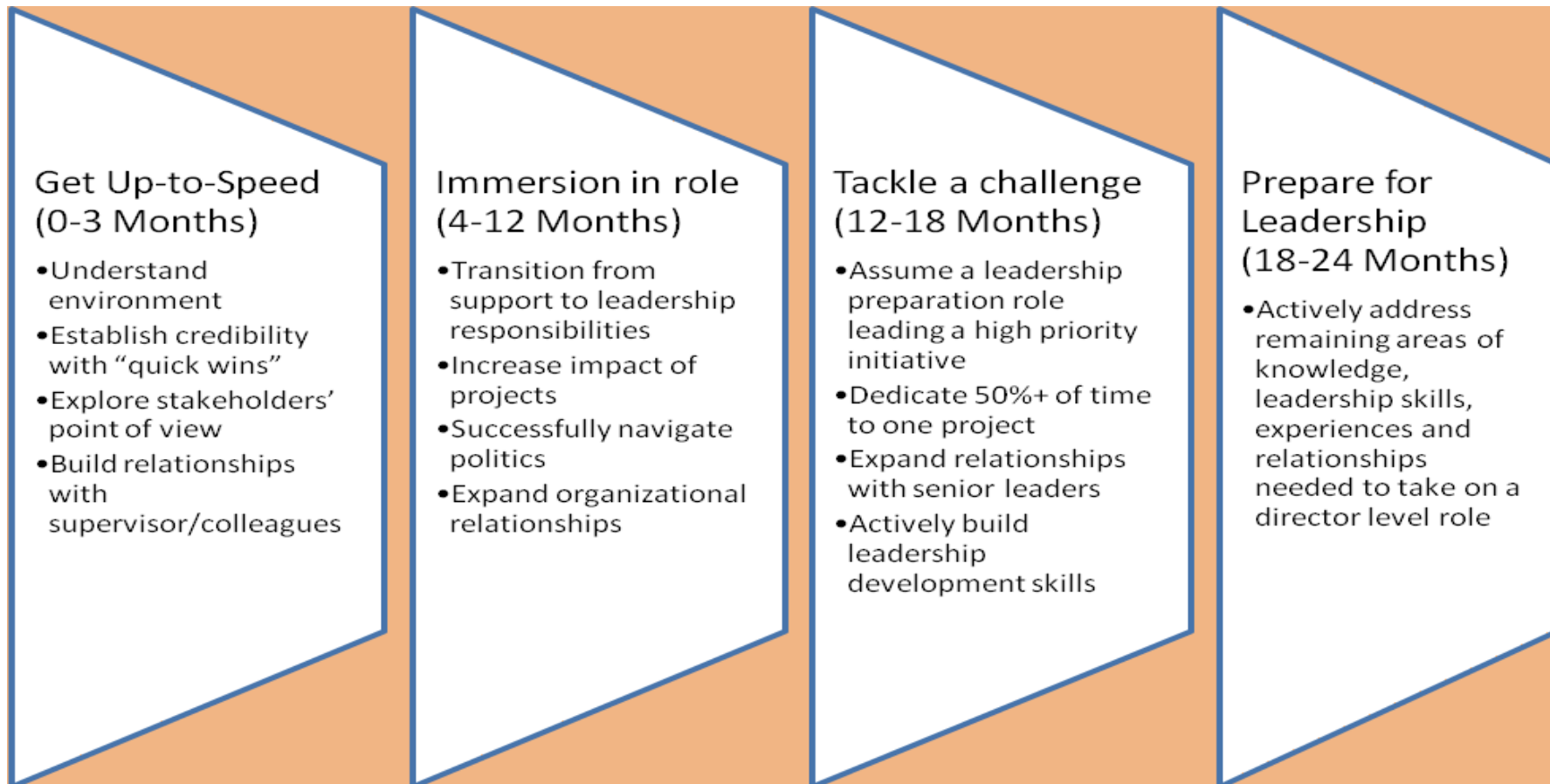
Typical Resident Roles and Role Development

We consider Residents to be on-track in year one if The Broad Center, the Resident and Supervisors agree that the Resident is:

- Contributing significantly to high-priority projects
- Building understanding of the organization and the work of different departments
- Building relationships with staff across levels and functions
- Developing the skills and knowledge needed to be a leader in urban education
- Gaining increased responsibility over time



During the Residency and as part of the position proposal process, The Broad Center will work with the Partner organization to ensure that Resident roles are meeting both the needs of the organization and the professional development goals of The Broad Residency.

Residency role progression over twenty-four months

Sample Resident Roles – Districts

Senior Manager, Human Resources Operations

This district of 80,000 students has identified in their strategic plan, strategies to recruit, retain, empower, develop and reward effective educators as a critical component of the overall reform plan. This strategic plan includes one of the nation's first pay for performance plan for teachers. The realignment of the Department of Human Resources to lead strategic human capital reform is a key aspect of the overall human capital efforts.

The resident will serve as a member of the Human Resources Leadership Team and will provide project management and strategic leadership by: working closely with the Chief Human Resources Officer to support effectiveness of the HR leadership team, including collaboration among the team and outside of HR on key strategic projects; overseeing aspects of the Broad HR Transformational Grant, including:

- Analysis and optimization of the HR organizational structure, including analysis of resource allocations, potential process improvements and development and refinement of human capital and HR performance metrics
- Development of tools to ensure meaningful principal decision making on teacher tenure
- Expansion of professional development opportunities to increase the capacity of principals on core human capital issues
- Implementation of improved communications to better convey the value of total compensation, including performance incentives and retirement benefits, to current and potential employees
- Leading implementation of core components of Colorado's new Educator Effectiveness Statute, including the requirement of mutual consent hiring in all schools and institution of a new system for awarding tenure based on effectiveness, not just time in position
- Overseeing the HR internal communications, HR leadership team agendas, calendars and budget functions

Senior Director, Charter Schools Office

In this district of one million students, the resident will fill the role of Senior Director of the Charter Schools Office. The resident will work with the Executive Director in setting the strategy and policy for the office and coordinating new school development, managing ongoing accountability and operations for existing charter schools. The Senior Director will play a key role in shaping policy for the Department of Education as it relates to charter schools. The Senior Director will be called upon to be the face/voice of the Department on issues such as

school quality, the expansion of school choice as a catalyst for system reform and equitable funding. The Senior Director will be responsible for leveraging a variety of resources to increase demand for new schools and advocate for strong accountability measures to ensure all New York City public school students have access to high-quality schools.

The Senior Director will coordinate work streams in the areas of Policy, New School Development, and General Program Management to include:

- Develop and influence Department of Education policy regarding charter schools, including policies impacting special populations, enrollment, and budget, to establish an equitable and effective range of program options for students and families
- Provide policy analysis and recommendations to Executive Director on issues including charter school new applicant team analysis, renewal and site placements
- Establish criteria for effective new charter schools to be used in application review process. Develop strategies to expand leadership pipeline conduits increasing the diversity and quality of applicants to open new schools. Implement pipeline strategies developing relationships within, and external to the DOE to identify qualified school leaders. Support the work of partner organizations engaged in new school development. Participate in community and political engagement activities related to new school development in selected areas. Advocate for the new charter schools initiative and represent the DOE at community meetings and events designed to engage parents and other critical stakeholders
- Manage other sensitive projects as needed. Trouble-shoot, problem-solve, and anticipate issues that affect charter schools in development and ongoing operation. Facilitate relationship with the SED, SUNY, and other key constituents. Respond to internal and external data requests from the public and the press

Project Manager, Department of Curriculum and Instruction

The Broad Resident will be the project manager to support this District of 134,000 students with the implementation of the 4-year 7.3 million dollar award for the Advanced Placement and International Baccalaureate Ready (AP & IB Ready) portion of the District's Race to the Top (RTTT) application. Through the Advanced Placement and International Baccalaureate Ready (AP & IB Ready) project, the district proposes to substantially increase the number of high school graduates, particularly students from historically underrepresented subgroups, who are prepared to gain admission to and successfully matriculate through college by accessing and succeeding in AP and IB courses.

The Broad Resident will work with the College and Career Unit within the Department of Curriculum and Instruction to plan, implement and carry out the activities outlined in the Advanced Placement and International Baccalaureate Ready (AP & IB Ready) project, including the development of a comprehensive action plan to implement and monitor the work which will be overseen by the Chief Academic Officer.

The Broad Resident will be responsible for keeping the financial records for the AP & IB Ready project, work with budget to file all state reports and resolve all financial issues. The Resident will work with the College and Career unit to keep activities on schedule and problem solve extensions or addendums, as needed.

The resident will attend meetings and present progress on the RTTT plan, lead meetings and make suggestions for the grant amendments, attend and present at Executive Council Meetings, attend all Departmental meetings of Curriculum and Instruction, and attend all meetings of the college and career ready team, in addition to leading meetings with school coordinators for AP and IB, and attending Board and Community Meetings as warranted.

Project Manager, Human Resources

In this district of 200,000 students, the resident will assist the Chief Human Resources Officer with ongoing Human Resources strategic priorities and develop and manage projects with department and organizational impact. This position works with the Chief Human Resources Officer to ensure that HR initiatives align with the district goals and overall strategic direction, most notably the Effective Teacher Initiative. The resident will work with HR leadership and cross-functional teams in the planning, development and implementation of major projects, including key elements of the district's Strategic Direction such as placing an effective teacher in every classroom and an effective principal in every school.

Initial tasks for the resident will include the following:

- Serve as a project manager in the development of a web-based application to track student progress measures as a part of the new evaluation system for teachers. Deliverables will include the development/testing/training of the tool for launch in the fall, with on-going support and coordination throughout the school year

- Support in the launch of PD360, an online professional development system for teachers, and the potential integration of PD360 with PeopleSoft. Deliverables will include the successful rollout of this new tool for teachers, as well as the PeopleSoft data integration
- Support the Assistant Superintendent for Talent Management in the training of HR Business Partners, a new role created to support schools as a "one-stop shop" for HR needs. In addition, as the direct support for the Chief HR Officer, the resident will be responsible for getting up-to-speed on a variety of HR issues and key stakeholders to advise the Chief Human Resources officer

Manager, Capital Planning & Analysis

Three core projects would fall under the resident's position in this district of 80,000 students. Each will provide high levels of exposure to the district's senior leadership and department heads and their staffs.

1. 2012 Bond Program Development Coordination: the district has begun preliminary work in organizing a district-wide capital needs assessment (primarily facilities & technology). Over the course of the next year, the resident will help lead organizing, assembling and preparing a 2012 Bond Program Report and will work with both internal and external stakeholders to build support for the bond program. The effort will involve a high level of coordination and collaboration across a full spectrum of operational and academic departments. Work will ultimately lead to a 2012 Ballot initiative with likely excess of \$300 million.
2. Strategic Facility/Capacity Solutions: includes both short and long term solution development that addresses school specific and regional capacity constraints. Resident will lead development of a range of solutions to solve operational and academic capacity impacts.
3. Special Projects: a) Financial Analysis: resident will work closely with CFO's team and Planning & Analysis on a variety of targeted project efforts (i.e. Mill Levy Needs Assessment, for assessing revenues) b) Operations Implementation Toolkit: Resident will work directly with the operations implementation team in the development of a comprehensive new school, shared campus, school closure toolkit that will compile and organize a continuous project improvement effort that has been underway since 2008.

Project Manager, Office of Employee Performance

The Broad Resident's main responsibility would be to serve as a project manager and support the implementation and analysis protocol for teacher evaluations in the district of 80,000 students. The goal would be to move the teacher evaluation process from more being compliance driven to performance driven. The resident would also assist the Director of Employee Performance in revising policies and procedures around teacher evaluations and inform the collective bargaining agreement process.

The resident would collaborate with the Department of School Leadership, the Department of Teacher Leadership and Professional Development, the Office of Accountability, and the Division of Human Resources in the implementation of the new teacher evaluation model.

This work would integrate the work already in progress with our Performance Management grant from the Dell and Broad Foundations and our FIRST pay for performance program funded by the Teacher Incentive Fund from the U.S. Department of Education.

Deputy Director of Early Childhood Education

During the first year the resident will fill the role of Deputy Director of Early Childhood Education in this district of one million students. The resident will work with the Executive Director on professional development initiatives citywide, including strategy planning for citywide impact, research on best practices and pre-kindergarten efficacy, and the development of accountability systems for early childhood.

They will serve as the point of contact with early childhood leadership for fee for service professional development planning, marketing and implementation. This role is also a high-level policy advisor for all early childhood education initiatives ensuring the appropriate design, development, implementation, oversight, evaluation and modification of educational initiatives from birth through grade three. The Deputy Director will represent the Early Childhood office and the DOE in a variety of settings. The Deputy Director serves as a resource for central, school support organizations, school-based personnel, families and community groups relative to methodology, materials, practices and procedures for both traditional and alternative early childhood education initiatives. This position also provides leadership and expertise relative to improvement initiatives for identified low performing schools; promotes collaboration with colleges, universities, members of the business community and others relative to the development of early childhood education initiatives.

The role of the Broad Resident entails building relationships with various offices including the Pre-kindergarten borough offices, Teaching & Learning staff, Community Based Organizations, City agencies, Advocacy organizations, Integrated Service Centers, School Support Organizations, Office of Student Enrollment Planning and Operations, Office of Portfolio Development, Office of Budget Operations and Review, Division of Contracts and Purchasing, Division of Financial Affairs other Central Department of Education (DOE) offices.

Sample Resident Roles – Charter Manager Organizations

Director of Performance Management and Systems

In this CMO of four schools, the Broad Resident will serve as the Director of Performance Management and Systems, and will manage academic and school performance data in order to identify trends, improve practices, and inform critical decision-making. Key responsibilities include, but are not limited to key Innovation & Technology responsibilities:

- Leads program team to pursue central initiatives, including innovation and technology, and serves as the Direct Manager to the Tech Support Staff
- Assesses and recommends data software solutions. Assists with the evaluation and implementation of systems, technologies, and business practices related to data management
- Administers Student Information System database (PowerSchool), including the trouble-shooting of any implementation and technology issues
- Manages data integrity with schools' Analysis & Reporting. Provides schools with accurate and predictive data about state and network achievement levels, and informs school leaders about trends and patterns in performance to inform decisions about changes to curriculum, instructional guidelines, professional development and education design
- Conducts statistical analysis of student achievement data and school information and maintains data warehouse of all student assessment scores and reports on assessments, school progress, and student progress
- Works with school and regional leadership to identify key metrics to monitor student, school, and regional progress and inform decision-making. Manages strategic and annual planning for system wide efforts

Director of Accounting & Finance

The resident will fill a key leadership role in a Charter Management Organization that contains five schools and will focus primarily on finance, funding, and purchasing.

Finance, Budgets and Facilities:

- Develop and manage school budgets with Principals and the central office budget with other managers and the Executive Director. Provide training to school staff to understand and create realistic budgets
- Develop sophisticated, dynamic budget tools linking available funds to school enrollment. Create user-friendly reports enabling principals to compare budgets to actual and historic spending each month, thus enabling principals to manage and be accountable
- Ensure a timely and accurate close that includes balance sheet, income statement and cash flow statement.

- Work with Executive Director to create multi-year financial model that addresses debt needs for facility development. Act as lead for all loan applications

Funding and Growth:

- Gain a comprehensive understanding of charter school finance; varied public funding streams and timing; and facilities funding
- Board: staff the CMO Finance and Audit committees. Prepare materials for the committees and serve as the liaison between the committees and staff
- Work with the Executive Director and Director of Operations to help draft and execute a plan that will create a road map for growth the CMO prepares to open two new schools in 2012

Compliance and Purchasing:

- Work with the Director of Operations to ensure that all schools are meeting state, local and federal rules and regulations
- Work with the Director of Advancement and Director of Operations to ensure that all foundation reports are submitted

Director of External Relations/Chief of Staff

- Map internal processes and procedures: The first project assigned to the resident will be to map the current processes and procedures in all areas of the organization – education, operations, and external relations. After study and analyses, the resident will work with staff to improve these processes and create written guides so that each process can be better understood by new staff and/or external partners.
- Create a new staff manual as there is no comprehensive or complete HR manual for the staff. The resident will develop this manual and related training
- Create a “green lighting” process that outlines the processes, procedures, and decision points involved in assessing open new school opportunities. This process should focus both on the steps required to open schools under existing charter in Chicago and the procedures required to open schools outside of Chicago.
- Review current marketing, advertising and brand development. Report to the Executive Director and External Relations Cluster how to improve the quality of marketing across the network
- Improve board functioning. Over the last five years, the board has made great strides in transitioning from a “managing” to a “governing” board. Improvements are required in the planning and execution of board meetings, development of board goals that are separate from staff goals, and annual board evaluation. The Resident would work with the Executive Director and Executive Committee of the Board to accomplish these very important changes

- Develop student performance report templates for different stakeholders. The CMO plans to develop semi-annual reports for stakeholders that are clear, concise, and audience-appropriate. The resident will be required to take lead on this project and should be equipped to interface with the education team and our stakeholders to determine format, content, and methods of delivery

Senior Director of Operations

The Broad Resident will work directly with the CFO of Dallas' largest (seven schools and 5,000 students) network of college-preparatory charter schools on the following critical initiatives:

Budgeting, Funding, and Growth

- Work directly with campus leadership teams and CMO Executive Team to lead the annual budgeting process for 7 physical campuses that represent over \$50 million in annual revenue
- Meet with campus leadership monthly to analyze expenses to date versus budgeted amounts and help support campus leaders in monitoring and managing their budgets
- Present proposed annual budgets for 2012-13 school year to the Board for approval, and continue to refine budgeting process and tools
- Support CFO with Spring 2012 bond offering, anticipated to be over \$45 million. Work directly with independent financial advisor, bond counsel, and underwriter
- Participate in regular meetings with CEO and Founder on financing needs for the following year's new schools, participate in investor calls with potential buyers of bonds, and supports preparation for and participates in regular meetings with the board Finance and Audit committees
- Gain a comprehensive understanding of charter school finance, varied public funding streams and timing, and facilities funding

Sample Resident Roles – State Education Agencies

Project Manager

In the role of Project Manager, the Broad Resident would report directly to the Deputy Commissioner and would be responsible for overseeing key initiatives underway related to charter schools. The resident would work closely with the Director of the Office of Charter Schools to develop and implement new initiatives to support charter school growth in New Jersey. Among the top reform priorities of the NJDOE is increasing the number of high-quality school choice options for children and families in the state.

The Broad Resident would be directly responsible for leading one or more of these initiatives:

1. **Charter Application:** The Department is committed to a total overhaul of the current charter application. The resident will perform extensive research on best practices and model applications nationwide and will design an application that provides the authorizer with clear information to assess the capacity of the applicant as well as the likelihood that the proposed program would lead to high levels of student achievement.
2. **Performance Based Contracts:** The NJDOE is seeking to institute performance based contracts for all new and existing charter schools. The resident will research best practices and national models for forms of contracts, draft a form of contract, and work with DOE staff and the Attorney General's office to gain approval. Additional work on this project will involve monitoring the proposed charter school legislation to ensure that the new form of contract reflects additional autonomies granted by the new legislation.
3. **Charter School Accountability:** The NJDOE seeks to improve the overall quality of the charter schools operating in the state. This involves allowing successful schools to expand or replicate and closing down perennial low performers. In order to achieve these goals, the Department must create and implement a transparent and effective accountability system.
 - a. The resident would be responsible for helping to develop and implement a monitoring system that addresses the necessary state compliance obligations but is also based on student achievement data and the above mentioned performance contracts. This project will involve an evaluation of the current monitoring system, extensive work with the NJDOE Office of Data and Research to determine appropriate student achievement data, and the creation of clear and concise evaluation metrics.

Special Assistant to the Secretary of Education

Building long-term capacity and supporting RTTT implementation in high-need LEA:

- The Special Assistant will be deployed to LEAs that need extensive direct support to improve their capacity to raise student achievement and meet the goals of RTTT. Working in partnership with the Performance Management Unit, the Teacher and Leader Effectiveness Unit, and the Turnaround Schools Unit, the Special Assistant will provide integrated support directly to the senior leadership team within these districts

Managing internal and external communications related to the State's reform effort:

- The Special Assistant will be responsible for the State's communication strategy and proactive stakeholder management efforts. This will include developing a forward-looking communications plan to create long-term alignment around the State's reform among educators, parents, business leaders, DOE employees, students, and others

Supporting the launch of the Teacher and Leader Effectiveness Unit:

- The Special Assistant will help lead parts of the planning and execution of the work of the Teacher and Leader Effectiveness Unit during the critical first year of operations, and especially during start up

Other projects as needed:

- The Special Assistant will share responsibility with the Secretary and Deputy Secretary for critical strategic initiatives as needed

Special Assistant to the Deputy Commissioner

The Special Assistant to the Senior Associate Commissioner will be responsible for working closely with the project leaders and teams on two delivery goals: educator effectiveness and data systems to support instruction. The state goal for educator effectiveness calls for improving the effectiveness of administrators and teachers across the state, particularly in underperforming districts through a variety of new programs and initiatives:

- The resident will design and oversee an oversight plan that ensures effective coordination and integration of key projects associated with the Educator Effectiveness goal including the design and execution of its new educator evaluation regulations (which will be supported by a vendor), development and refinement of a model educator evaluation system, and management of the Teacher Incentive Fund grants
- The resident will work with the information technology staff and lead customer representatives to ensure that the state's technology builds meet state and local customer needs and that the IT staff communicate effectively with customers about their progress and any problems or issues that arise
- Develop a plan to ensure that the data collected for the educator effectiveness program is leveraged across the other delivery goals when appropriate
- Work closely with the Delivery Unit in the Office of Planning and Research (OPR), attending regular operational meetings to ensure that program teams for educator effectiveness and data are sufficiently resourced and on track to deliver against their delivery plans, and that the interdependencies and interrelationships are clearly identified with coordinated actions

Special Advisor for Special Education

The state is engaging in initiatives to improve the performance of all students receiving special education services. The State Department of Education intends to scale up the best practices implemented in pilot districts, to target students who are underperforming in other districts.

The resident will serve as the liaison between the state department of education and contracted agency, The International Center for Leadership in Education, for the purposes of documenting best practices, charting academic progress of the schools involved in the project, and develop training manuals to build capacity of internal staff and district staff in order to take the project to scale.

The resident will assess educational services and programs provided through the state and district level, and provide strategic recommendations directed toward integrating and streamlining efficiencies so that outcomes are performance based and student centered. The resident will explore the sources of critical achievement gaps in underrepresented groups and make recommendations to stakeholders to eliminate them.

This initiative will require the Resident to analyze data, using the state's Special Education Records System, to drive targeted assistance for students with disabilities. The resident will work with leaders in the agency's three goal offices (Literacy, STEM, and College & Career Readiness) and the Recovery

School District to foster greater collaboration in order to more effectively serve students with disabilities. Finally, the Broad Resident will assist the Office of Parental Options, which oversees charter schools, in improving charter school oversight with regard to serving students with special needs.

Special Assistant to the State Commissioner of Education

The resident will be instrumental in building capacity for the State Educational Agency as it implements the reforms won in the Race to the Top competition. The special assistant will work with the Commissioner and his senior team to help assess SEA capacity, review organizational structure, and design internal reporting and communication structure for new Commissioner.

Supporting the SEA's Delivery Unit as it works against aggressive RTTT goals, the special assistant will work with the nascent delivery unit at the SEA to help ensure that the state is effectively tracking results, communicating progress to goals, and deploying resources to LEAs against the RTTT plan.

To operationalize the launch of the statewide teacher and principal evaluation system, the special assistant will help the Commissioner and his chief of staff monitor the statewide execution of a new teacher and school leader evaluation system (based 50% on student achievement results). In particular, the Special Assistant will help ensure that district superintendents and principals have the training and knowledge base needed to execute consistently across the state.

The Special Assistant will share responsibility with the Commissioner and Chief of Staff for critical strategic initiatives as needed, including development of a comprehensive data analysis plan, development of stronger teacher and leader pipelines, and recruitment efforts to bring exceptional charter networks into the state.