



**Carnegie Foundation** for the Advancement of Teaching

# **ADVANCING TEACHING – IMPROVING LEARNING (ATIL)**

## **Policy for Improvement Expert Convening**

### **MEETING SUMMARY** **Washington, DC • June 6, 2014**

**Report prepared by Corey Donahue**

**July 2014**  
Carnegie Foundation for the Advancement of Teaching  
Stanford, CA

*Funded through a cooperative agreement with the Institute of Education Sciences*

# Convening Summary

## **BACKGROUND AND INTRODUCTION**

On June 6, 2014, the Advancing Teaching – Improving Learning (ATIL) program at the Carnegie Foundation for the Advancement of Teaching hosted eighteen leading policy and quality improvement experts in Washington, DC with the goal of discussing the role of policy in fostering the increased use of quality improvement methods in schools.

After 50 years of success and influence in other sectors and industries, quality improvement (QI) is gaining currency among policy makers, researchers, and practitioners as a promising approach to R&D in K-16 education. Over the past five years, the Carnegie Foundation for the Advancement of Teaching has been engaged in an exploration of the application of QI in organizations and through networked improvement communities (NICs) to transform the relationship between R&D and practice in this field.

QI is the disciplined use of evidence-based quantitative and qualitative methods to improve the effectiveness, efficiency, equity, timeliness, and reliability of services, processes, and systems toward the pursuit of better outcomes. QI methods seek to bring analytic discipline to design-development efforts through rigorous protocols for prototyping, testing, and spreading improvement ideas. In this way, QI aims to discern what works for addressing a particular problem, for whom, and under what set of specific conditions. It represents a field of applied activity focused on the day-to-day problems of practice that have genuine consequences for people's lives. A number of different methodologies are represented by the term (QI), including improvement science, Lean, Six Sigma, total quality management, design-based implementation research, Deliverology, and positive deviance. There is more that these methods have in common than that separates them and we are seeking to cast a wide net when thinking of how policies can advance these common examples of improvement work.

While the work in QI has made progress toward integrating research and practice, certain current policy conditions in the field militate against the successful adoption of quality improvement tools and processes at scale. The field has much to learn about how policies can prevent or promote the integration of QI methods in educational settings. The Carnegie Foundation is interested in learning how policy action can be used to foster a greater degree of improvement activity in schools and districts by raising awareness of improvement approaches, creating incentives, investing in the human and technical infrastructure for improvement, and spreading promising ideas. A deeper understanding of these policies is an initial step toward spreading QI methods.

## **MEETING OVERVIEW**

In conjunction with a 90-Day Cycle<sup>1</sup>, the ATIL expert convening was designed to explore the role of policy to foster the conditions that support QI and what policy actions are

---

<sup>1</sup> 90-Day Cycles are a disciplined and structured form of inquiry designed to produce and test knowledge syntheses or prototyped processes or products in support of improvement work. With any type of activity, organizations inevitably encounter roadblocks to improving performance and outcomes. These barriers might include intractable problems at particular junctures or complex issues affecting the entire system. In either case, 90-Day Cycles can serve as a mechanism for organizing existing knowledge or generating new ideas to address these thorny challenges. (More information on 90-Day Cycles can be found here:

[http://www.carnegiefoundation.org/sites/default/files/90DC\\_Handbook\\_external\\_10\\_8.pdf](http://www.carnegiefoundation.org/sites/default/files/90DC_Handbook_external_10_8.pdf).) This particular 90-Day Cycle had an aim similar to that of the expert convening: determine how policy prevents and enables educational institutions in K-12 to both conduct quality improvement work in their organization and also in networked improvement communities. The end product is a conceptual framework composed of policies that can enable conditions necessary for quality improvement to thrive in education.

available to support QI at the local, state, and federal levels. The aim of the convening was to determine how policy prevents and can enable educational institutions in K-16 to both conduct quality improvement work in their organization and also in NICs. We sought to build a common understanding of QI methods, discuss what currently prevents this work from occurring, and identify policy strategies for supporting QI in education. In doing so, we also tested a conceptual framework composed of policy domains that can enable conditions necessary for quality improvement to thrive in education. The goals of the convening were to:

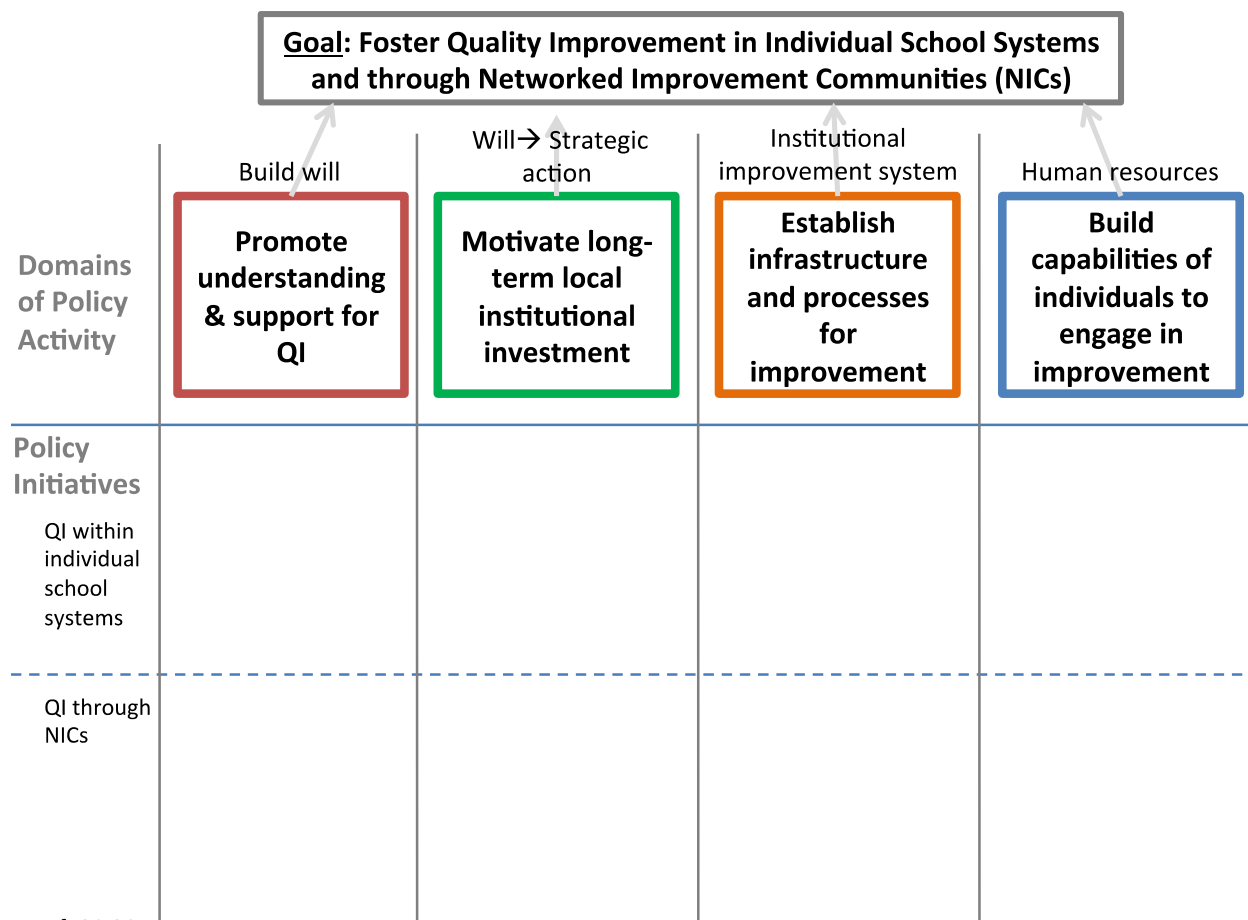
1. Build upon a common understanding of how quality improvement can advance deeper learning in education;
2. Identify policy strategies for supporting quality improvement in education; and
3. Develop content to frame the ATIL Capstone National Forum.

The eighteen convening participants were chosen based on their knowledge of QI (either in education or healthcare) or their knowledge of education policy. See Appendix B for a complete list of participants as well as brief biographies.

The day began with presentations on the purpose and tools of QI from Carnegie Foundation President Anthony Bryk and two participants: Brandon Bennett of Improvement Science Consulting and Rocco Perla, the Director of the Learning and Diffusion Group at the Centers for Medicaid and Medicare Innovation. The participants were then asked to discuss what prevents more QI work from occurring in the field. This was followed by a presentation from Senior Vice President Paul LeMahieu on the value of pursuing QI through networks, again followed by a discussion of the ways that current policy environment works against the adoption of these methods.

The ATIL team then sought to test and expand a conceptual framework (Figure 1) that identified four domains of policy activity that must be addressed in order to better support quality improvement:

1. Promote understanding and support for QI;
2. Motivate long-term local institutional investment;
3. Establish infrastructure and processes for improvement; and
4. Build capabilities of individuals to engage in improvement.



Draft 06-06-14

**Figure 1: Incomplete Conceptual Framework of Policy Domains to Support Quality Improvement Presented at the Expert Convening**

The framework above consists of a goal, policy domains that support that goal, and policy initiatives that comprise the domains. At the expert convening, we presented an incomplete version of the framework without policy initiatives so that we could ask the participants to help fill them in. A more complete version of the framework will be presented below.

Overall, the goal of this framework is to identify and classify policies that foster quality improvement in school systems. The framework is organized by domains of policy activity. These are the general categories of policies that can support quality improvement. While acting in any one of the domains may well have a positive effect on the introduction of more QI tools and methods to solve educational problems, addressing all four will be necessary (whether through policy or otherwise) in order to create more NICs or QI organizations. For each of the four domains, we included a brief descriptive phrase above for clarification.

The policy initiatives are what can be enacted in order to accomplish the domain goals. The policy initiatives are meant to be more specific, but are not necessarily at the level of specificity in order to begin action. Although we believe that, for the most part, those policies that support QI in organizations can also help in the success of NICs, we also asked for thoughts on special considerations for initiating and supporting NICs.

When discussing policy, we allowed for a fairly broad interpretation, believing that for any specific policy initiative, there are a number of ways in which that initiative can be enacted

and a number of policy arenas (federal, state, local, philanthropic, union, etc.) that can help achieve that goal. In addition, we are allowing for “policy” to include both formal regulations and legislation, as well as activities that policymakers can engage in, such as discussions with influential leaders, the spreading of ideas, and advocating ideas to public audiences.

At the expert convening, we tested these four domains and received suggestions for more specific policy initiatives that could be enacted through the use of these. We finished with a discussion of how Carnegie might use the framework and what policies we might try to actively promote.

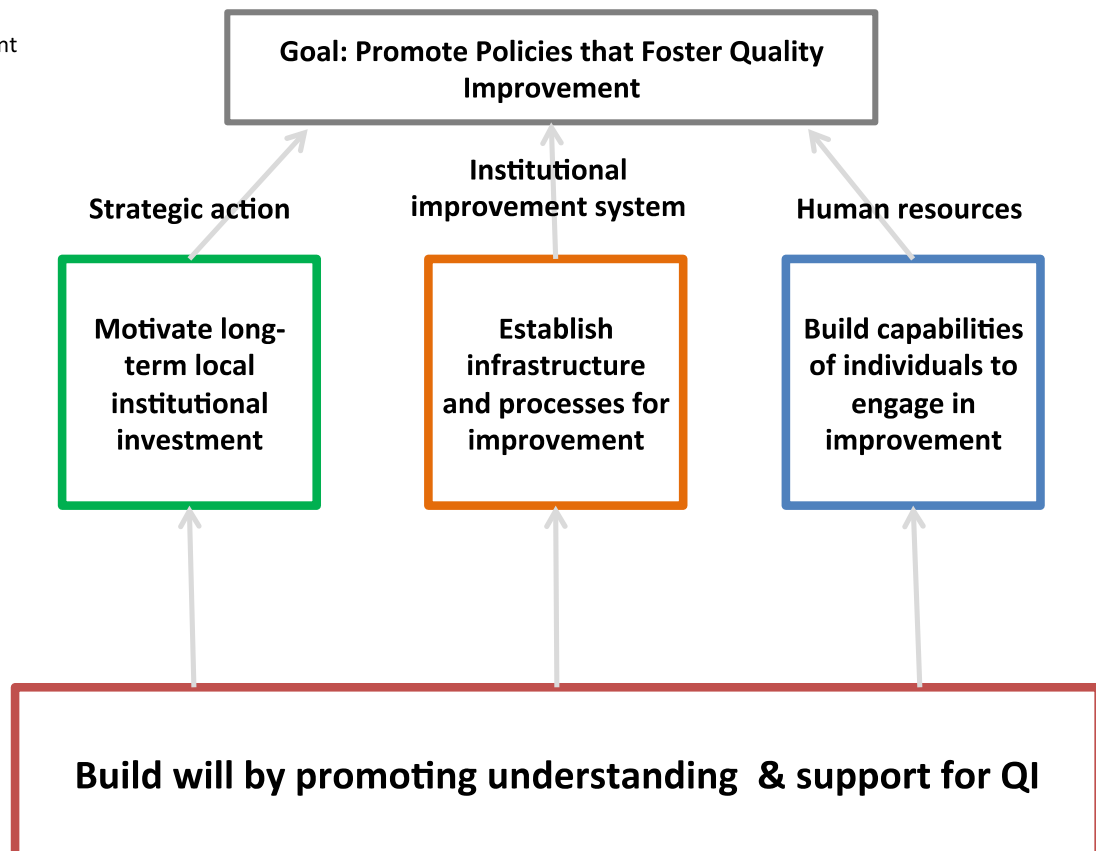
## **KEY TAKE-AWAYS**

- A number of factors prevent more QI from occurring in the field:
  - The impulse from policymakers for large-scale reform, often in response to fluctuating political forces and compacted political timelines, is antithetical to QI, in which small tests of change are encouraged in order to learn what works for whom and under what conditions. The scale at which some policies are enacted is often inappropriate given the field’s capacity to implement them.
  - Given the amount of time that it takes for improvement to occur—first through an exploration of the problem, then through development of a theory, the testing of ideas, and eventual scale-up/implementation—the fickleness of education reform initiatives can make long-term improvement difficult. While improvement takes time, conducting this work does not mean going slowly; instead, it means learning quickly in order to implement well to achieve quality reliably at scale. A long-term purpose coupled with sustained effort in its pursuit fosters a culture of stability within which innovations can be tried, tested, and spread.
  - Accountability pressures can dissipate improvement work in a few ways. As stated earlier, improvement takes time (mostly in its early, formative stages), and a lack of understanding of this by policymakers has inhibited QI from occurring in institutions. With the advent of No Child Left Behind, educational institutions are increasingly facing a short time scale in order to improve performance, with sanctions tied to failure to improve. In addition, this high-stakes accountability has spread beyond the institution to the individual level, with teachers now being held accountable for improving their students’ test scores. This fixed attention on teachers as individual performers contrasts with another tenet of quality improvement—systems thinking. A system is an indivisible whole made up of people, processes, culture, resources, and structures that work together to achieve a common purpose. Given the interdependencies of the parts in a system, a single-minded focus on just one part of the system will not result in substantial improvements in the system. Without attention to the system, there is ample evidence that even the optimization of one process in a system could contribute to the detriment of the performance of the whole.
- The ATIL team was able to improve upon the conceptual framework in a number of ways thanks to feedback from those at the expert convening. In Figures 2 and 3, we present the most recent framework with both the domains and a handful specific policy initiatives offered at the expert convening. Major differences include:
  - The participants focused throughout the convening on the need to build will, but the activities placed in this box had a somewhat different character from those

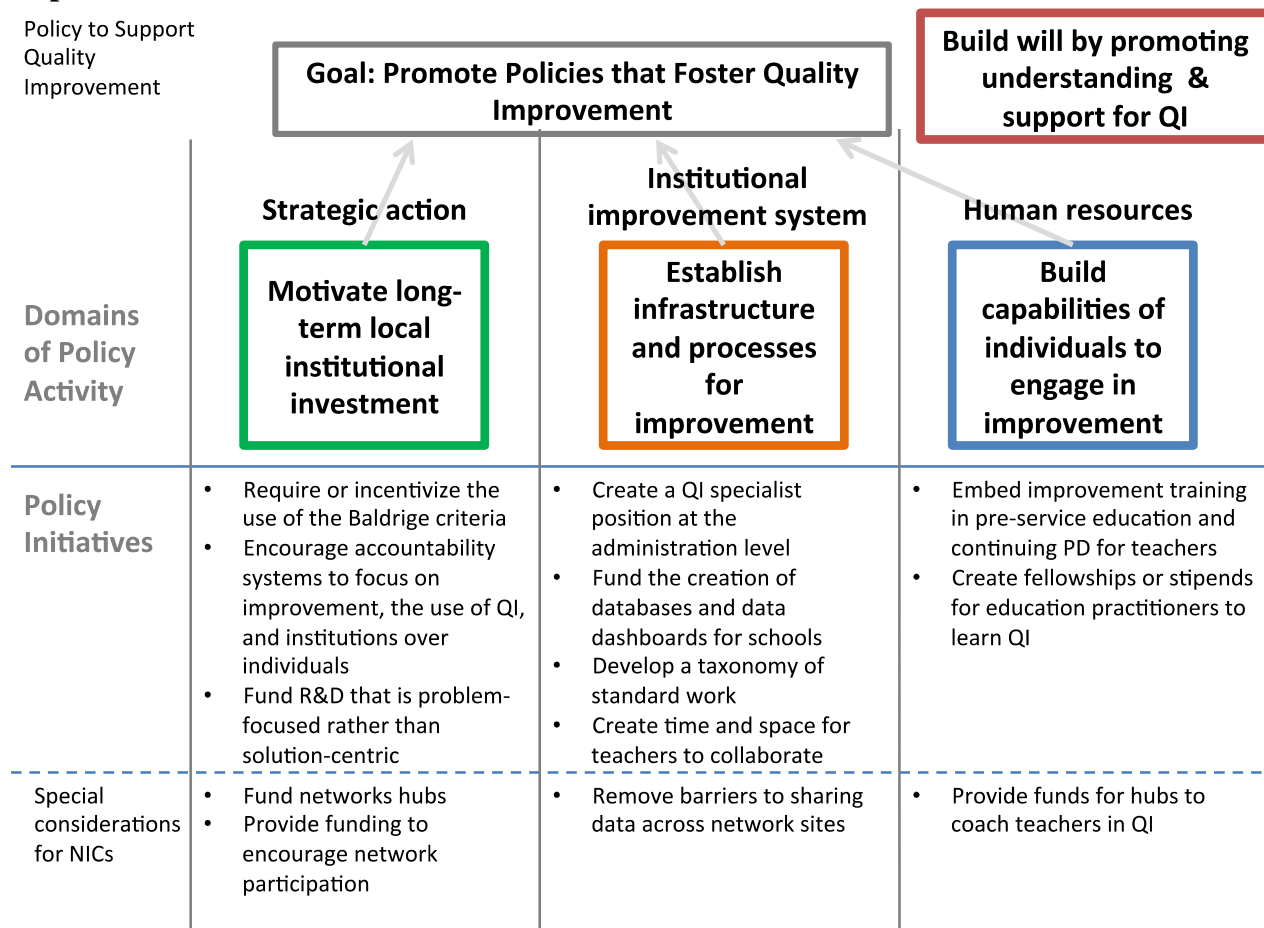
policies that were listed in the other domains. Either the activities were framed as advice to Carnegie on how the Foundation should advance this work or they were not specific policies that could be enacted at various levels. However, building will was seen as a critical aspect to this work with a number of crucial activities, including broader publication and communication of the value of QI, developing test cases for the effectiveness of these methods, and persuading leaders to use QI in their organizations. Due to this conflict, the ATIL team decided to separate it from the other policy domains, while still valuing those activities that are included under it. This can be seen in Figure 2, where it is a critical underpinning area of activity. In Figure 3, we retained its presence while focusing on the activities under the three main domains.

- Rather than separate QI done in organizations from QI done in NICs, we instead present “Special considerations for NICs.” Those at the expert convening felt that the separation was forced and uncomfortable, suggesting that we simply present what additional actions might need to occur for this work to be done in networks.
- The participants listed a number of policy initiatives to be pursued under each of the major domains. By way of illustration, we listed the most frequently cited ideas in the diagram below, although it is not an exhaustive list.

Policy to Support  
Quality  
Improvement



**Figure 2: Conceptual Framework of Policy Domains and Building Will to Support Quality Improvement**



**Figure 3: Conceptual Framework for Policy Initiatives to Support Quality Improvement**

- Those at the expert convening strongly advised against pursuing policy as the principal means by which one advances the spread of QI. A number of different reasons were offered, including the belief that the federal policy environment is currently too “toxic,” that QI needs to first build more proof cases of its effectiveness, and that some policymakers do not currently share some of the values of QI. While the participants were fully on board with the ideas presented, they argued that instead of pushing for policy as a primary solution we should attempt to build will around the ideas and pursue their adoption through means other than policy. They suggested partnering with other organizations who would want to pursue this work, developing an effective and engaging communications strategy, and writing about successful cases wherein this approach has worked. All of these strategies are meant not only to help spread the ideas, but also potentially to build the groundwork for what would later be an attempt to embed this kind of approach in policy. They did not necessarily argue that policy would never work, but that at the moment it would not be successful.

## **CONCLUSION**

The expert convening provided incredibly useful information for the Carnegie Foundation to consider when thinking of the role that policy plays in preventing or enabling QI methods in education. The feedback on how policy currently prevents QI, our conceptual framework, and Carnegie's strategy going forward were all very helpful. This work will potentially feed into parts of our September ATIL Forum in Washington, DC and will certainly be considered when determining the Foundation's approach to spreading QI in order to advance the performance of educational systems by building their capacity to improve.



## APPENDIX A: CONVENING AGENDA

# Agenda - Quality Improvement Policy Expert Convening

---

Carnegie Foundation for the Advancement of Teaching, 901 E Street, NW | Washington DC 20004  
June 6, 2014

- 8:00-8:30 Breakfast
- 8:30-9:00 **Welcome and Overview**  
Jeannie Myung, Senior Associate, Carnegie Foundation for the Advancement of Teaching
- 9:00-9:30 **Opening Remarks: Accelerating the Field's Capacity to Improve**  
Tony Bryk, President, Carnegie Foundation for the Advancement of Teaching
- 9:30-9:45 **Quality Improvement Fundamentals**  
Brandon Bennett, Principal Advisor, Improvement Science Consulting  
Rocco Perla, Assistant Professor, University of Massachusetts Medical School; Founding Director of the Regional Innovation Network at the Centers for Medicare & Medicaid Services
- 9:45-10:15 **Understanding the System for Quality Improvement in Organizations**  
Small group discussion
- 10:15-10:30 Break
- 10:30-10:45 **Networked Improvement Community (NIC) Fundamentals**  
Paul LeMahieu, Senior Vice President, Carnegie Foundation for the Advancement of Teaching
- 10:45-11:15 **Understanding the System for NICs**  
Small group discussion
- 11:15-12:00 **Refining a Framework of Policy Aims for Improvement in Education**  
Corey Donahue, Special Associate to the President, Carnegie Foundation for the Advancement of Teaching
- 12:00-12:45 Lunch
- 12:45-1:30 **Generating Policy Initiatives for Promoting Quality Improvement in Organizations**  
Break-out groups
- 1:30-2:00 **Generating Policy Initiatives for Promoting Improvement Science in Networks**  
Break-out groups
- 2:00-2:30 **Debriefing Policy Initiatives**  
Whole group discussion
- 2:30-2:55 **Next Steps for Organizing Action**  
Paul LeMahieu, Senior Vice President, Carnegie Foundation for the Advancement of Teaching  
Whole group discussion
- 2:55-3:00 **Close**

## APPENDIX B: CONVENING PARTICIPANT LIST

**Ann Bradley**

Director, Innovation Fund  
The American Federation of Teachers  
[abradley@aft.org](mailto:abradley@aft.org)

**Michael Casserly**

Executive Director  
Counsel of Great City Schools  
[mcasserly@cgcs.org](mailto:mcasserly@cgcs.org)

**Michael Cohen**

President  
Achieve  
[mcohen@achieve.org](mailto:mcohen@achieve.org)

**Justin C. Cohen**

President  
Mass Insight Education  
[juscohen@gmail.com](mailto:juscohen@gmail.com)

**Thomas B. Corcoran**

Co-Director  
Consortium for Policy Research in Education  
[corcoran@tc.edu](mailto:corcoran@tc.edu)

**Daphne Garcia**

Associate Research Scientist  
Office of the Commissioner, NCEERA  
Institute of Education Sciences  
[daphne.garcia@ed.gov](mailto:daphne.garcia@ed.gov)

**Patricia Greco**

Superintendent  
School District of Menomonee Falls  
[grecpat@sdmfschools.org](mailto:grecpat@sdmfschools.org)

**Kati Haycock**

President  
The Education Trust  
[khaycock@edtrust.org](mailto:khaycock@edtrust.org)

**Harry Hertz**

Director Emeritus  
Baldrige Performance Excellence Program  
[harry.hertz@nist.gov](mailto:harry.hertz@nist.gov)

**Terry Holliday**

Commissioner of Education  
Kentucky Department of Education  
[terry.holliday@education.ky.gov](mailto:terry.holliday@education.ky.gov)

**Brad Jupp**

Senior Program Advisor  
US Department of Education  
[brad.jupp@ed.gov](mailto:brad.jupp@ed.gov)

**Carmel Martin**

Executive Vice President, Policy  
Center for American Progress  
[escaple@americanprogress.org](mailto:escaple@americanprogress.org)

**Michele Meredith**

Knowledge Management Program Officer  
New Visions for Public Schools  
[mmeredith@newvisions.org](mailto:mmeredith@newvisions.org)

**Rocco Perla**

University of Massachusetts Medical School  
[rocco.erdos4@gmail.com](mailto:rocco.erdos4@gmail.com)

**Ana Tilton**

Executive Director  
Grantmakers for Education  
[atilton@edfunders.org](mailto:atilton@edfunders.org)

**Judy Wurtzel**

Consultant, Education Policy  
[jwurtzel@verizon.net](mailto:jwurtzel@verizon.net)

## **CARNEGIE FOUNDATION**

### **Tony Bryk**

President

[bryk@carnegiefoundation.org](mailto:bryk@carnegiefoundation.org)

### **Corey Donahue**

Special Associate to the President

[donahue@carnegiefoundation.org](mailto:donahue@carnegiefoundation.org)

### **Susan Headden**

Senior Associate, Public Policy Engagement

[headden@carnegiefoundation.org](mailto:headden@carnegiefoundation.org)

### **Sarah Kipling**

Research Assistant, Public Policy Engagement

[kipling@carnegiefoundation.org](mailto:kipling@carnegiefoundation.org)

### **Paul LeMahieu**

Senior Vice President, Programs and  
Administration

[plem@carnegiefoundation.org](mailto:plem@carnegiefoundation.org)

### **Jeannie Myung**

Senior Associate, Director of Student Agency  
Improvement Community and Director of ATIL

[myung@carnegiefoundation.org](mailto:myung@carnegiefoundation.org)

### **Elena Silva**

Senior Associate, Public Policy Engagement

[silva@carnegiefoundation.org](mailto:silva@carnegiefoundation.org)

### **Holly Szafarek**

Program Coordinator

[szafarek@carnegiefoundation.org](mailto:szafarek@carnegiefoundation.org)

### **Thomas Toch**

Senior Partner for Public Policy Engagement,  
Director of Washington, DC Office

[toch@carnegiefoundation.org](mailto:toch@carnegiefoundation.org)

### **Taylor White**

Associate, Public Policy Engagement

[white@carnegiefoundation.org](mailto:white@carnegiefoundation.org)

## PARTICIPANT BIOGRAPHIES



**Ann Bradley** the director of the AFT Innovation Fund. She joined the American Federation of Teachers in March 2010 after more than 20 years at *Education Week*, where she was a reporter and editor. Before joining American education's newspaper of record, she was a reporter and copy editor at *The Miami Herald* and a copy editor at the *Sun-Sentinel* in Fort Lauderdale. She is a graduate of the Medill School of Journalism at Northwestern University.



**Anthony S. Bryk** is the ninth president of the Carnegie Foundation for the Advancement of Teaching. He is leading work on transforming educational research and development, seeking to accelerate learning in and through practice to improve. Formerly, Tony held the Spencer Chair in Organizational Studies in the School of Education and the Graduate School of Business at Stanford University from 2004 until assuming Carnegie's presidency in September 2008. He came to Stanford from the University of Chicago where he was the Marshall Field IV Professor of Urban Education in the sociology department, and where he helped found the Center for Urban School

Improvement, which supports reform efforts in the Chicago Public Schools. Tony also created the Consortium on Chicago School Research, a federation of research groups that have produced a range of studies to advance and assess urban school reform.

**Michael Casserly** has served as Executive Director of the Council of the Great City Schools, the nation's primary coalition of large urban public school systems, since January 1992. Before assuming this position, he served as the organization's Director of Legislation and Research for 15 years. As head of the Council, Dr. Casserly unified urban schools nationwide around a vision of reform and improvement; launched an aggressive research program on trends in urban education; convened the first Education Summit of Big City Mayors and Urban School Superintendents; led the nation's largest urban school districts to volunteer for the National Assessment of Educational Progress (NAEP); led the first national study of common practices among the nation's fastest improving urban school districts; launched national task forces on urban school challenges; and rallied the nation's urban school systems in support of the common core standards. He is currently spearheading efforts to further boost academic performance in the nation's big city schools; strengthen management and operations; and improve the public's image of urban education. While Director of Legislation and Research for the Council, Dr. Casserly initiated major reforms in Title I, Vocational Education, and Drug Free Schools. He also initiated and wrote the federal Magnet School Act, and he has garnered over \$50.0 billion in extra federal money for urban schools over the years. Dr. Casserly has also written numerous studies, reports and op-ed pieces on urban schools. He has produced television shows with Dan Rather, Charlene Hunter-Gault, Carole Simpson, Carl Rowan, and Juan Williams, and serves on numerous national boards and advisory groups. He has also appeared on numerous television and radio shows, and his legislative work has been the subject of a college textbook on how Capitol Hill really works. He is considered by many to be one of Washington's best education advocates, and an expert on urban education, governance, and federal policy. *Washington Almanac* listed Casserly as one of Washington DC's 400 most powerful individuals, and *USA Today* calls Casserly a "crusader" for city schoolchildren. Dr. Casserly is a US Army veteran, and holds a PhD from the University of Maryland and BA from Villanova University.



**Michael Cohen**, a nationally-recognized leader in education policy and standards-based reform, became President of Achieve in 2003. He has held several key roles in education during the past 20+ years, including Director of Education Policy at the National Governors Association (1985-90) and Director of Planning and Policy Development at the National Association of State Boards of Education (1983-1985). During the Clinton Administration he served as Assistant Secretary for Elementary and Secondary Education, Special Assistant to President Clinton for Education Policy, and Senior Advisor to US

Secretary of Education Richard Riley. Created in 1996 by the nation's governors and corporate leaders, Achieve is an independent, bipartisan, non-profit education reform organization based in Washington, DC that helps states raise academic standards and graduation requirements, improve assessments and strengthen accountability so all students graduate ready for college, work and citizenship. Under Mike's leadership, Achieve launched the American Diploma Project Network, formed the Partnership for the Assessment of College and Career Readiness (PARCC) – one of two multi-state consortia developing common assessments – and helped develop the Common Core State Standards.



**Justin C. Cohen** is president of Mass Insight Education. Mass Insight Education works with state education agencies, school districts, and partner organizations to prepare more students for "College Success." Mass Insight Education leverages rigorous academic strategies, next generation system design, and public engagement strategies to create new kinds of urban school systems, organized around the needs of student. Prior to joining Mass Insight, Justin was director of the office of portfolio management, and senior advisor to the Chancellor at the District of Columbia Public Schools (DCPS). While at DCPS, Justin led the district's work in creating long-term strategies for

fostering quality, innovation, and growth in the schools portfolio. His office managed a diverse selection of school reform models, and upon his departure, almost half of the district's schools had adopted at least one of those models. Before that Justin was director of industry support and development for the National Alliance for Public Charter Schools and spent time at Edison Schools. Justin has served on the national boards of the Yale Alumni Fund and Students for Education Reform, and he is a trustee of the Cesar Chavez Public Charter Schools in Washington, DC. His writing on school turnaround has appeared in the Stanford Social Innovation Review and the NationalJournal.com. Justin has a BA in cognitive science from Yale.



**Thomas B. Corcoran** is Co-director of the Consortium for Policy Research in Education (CPRE), Associate Vice President of International Affairs at Teachers College, Columbia University, and principal investigator of the Center on Continuous Instructional Improvement (CCII). Previously, Mr. Corcoran served as Policy Advisor for Education for New Jersey Governor Jim Florio, Director of School Improvement for Research for Better Schools, and Director of Evaluation and Chief of Staff of the New Jersey Department of

Education. He has served as a consultant to urban school districts and national foundations on improving school effectiveness and equity and on two National Research Council study committees addressing K-8 science and the framework for Next Generation science standards. Mr. Corcoran's research interests include strategies for improving instruction, the use of research findings and clinical expertise to inform instructional policy and practice, the effectiveness of different approaches to professional development, knowledge management systems for schools, and the impact of changes in work environments on the productivity of teachers and students.



**Corey Donahue** is special associate to the president at Carnegie. He is a recent graduate of Washington University in St. Louis where he received his BA in Political Science and Economics.

**Daphne Garcia** is an Associate Research Scientist at the National Center for Education Evaluation and Regional Assistance at IES.



**Patricia Greco** is the superintendent of schools for the School District of Menomonee Falls. Pat received her doctorate from the University of Wisconsin in 1995. She has been recognized as an instructional leader and advocate for student learning at the state and national level. Pat was recognized as Educator of the Year by Wisconsin Manufacturers and Commerce, received recognition by State and National PTA for Elementary School of the Year as an elementary principal, and received the Educational Influence Award from Wisconsin ASCD for her advocacy for children and public education. She has extensive background in leading instructional and organizational improvement.

Pat has dedicated her professional service to organizations committed to impacting strong learning outcomes for students and educators. She currently serves nationally on the Educational Research Development Institute working with business leaders focused on research in the educational field. Within her community, Pat is on the Chamber CEO Round Table, Leadership Menomonee Falls, has served on the Library Board of Directors, and is active in community service. Now a superintendent, her career has included roles as teacher, principal, assistant superintendent, and as Associate Dean for Education Outreach at UW-Milwaukee. She continues to serve as a state leadership mentor and an ad hoc instructor for the University of Wisconsin – Milwaukee and Cardinal Stritch University.



**Kati Haycock**, one of the nation's leading advocates in the field of education, founded The Education Trust to promote the high academic achievement of all students, pre-kindergarten through college. In particular, the organization seeks to close the gaps in opportunity and achievement that consign too many low-income students and students of color to lives on the margins of the American mainstream. Before leading Ed Trust, Kati served as executive vice president of the Children's Defense Fund, the nation's largest child advocacy

organization. A native Californian, she has received numerous awards for her service to our nation's youth, and serves as a director on several education-related boards, including those of the Carnegie Foundation for the Advancement of Teaching, The New Teacher Project, and the Hunt Institute.

**Susan Headden** is senior associate for public policy engagement at the Carnegie Foundation for the Advancement of Teaching's Washington, DC office, where she contributes to the foundation's research and writing projects on teacher improvement and student motivation. Most recently, Headden was the managing editor at Education Sector, a leading independent education think tank, where she wrote on a number of topics, including the Common Core State Standards and assessments, college remediation, and teacher evaluation. She has also worked as an independent communications consultant. A Pulitzer Prize-winning journalist, Headden has extensive experience in editing, investigative reporting, and education writing. She spent many

years at *U.S. News & World Report*, having served as assistant managing editor for national news, investigations, and education, and as managing editor of the magazine's newsstand book division. Headden also supervised the magazine's annual "America's Best Leaders" project in collaboration with the Center for Public Leadership at Harvard University's Kennedy School of Government.

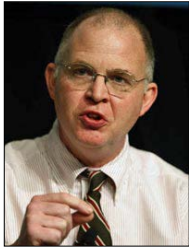


**Dr. Harry Hertz** retired in June 2013 from the National Institute of Standards and Technology (NIST) where he had served as the Director of the Baldrige Performance Excellence Program since 1995. He has been the primary architect of the Baldrige Criteria for Performance Excellence for over 15 years. Originally having strictly a business focus, he was responsible for the expansion of the Baldrige Program and Award to health care, education, and nonprofits, including government. Dr. Hertz has made presentations to a wide variety of audiences on elements of organizational excellence and change management, the Baldrige criteria for measuring performance excellence, and on health care quality improvement. The Baldrige Program challenge is to translate relevant observations into organizational performance management criteria. Harry says that is one of his hobbies! Dr Hertz started at NIST in 1973, originally as a research chemist, and then in a series of management positions including Director of the Chemical Science and Technology Laboratory. He has a BS in Chemistry from the Polytechnic Institute of Brooklyn and a PhD from MIT. Following graduate school, Dr. Hertz spent two years as an Alexander von Humboldt Fellow at the University of Munich. Dr. Hertz is a Fellow of the American Association for the Advancement of Science (AAAS) and an Honorary Fellow of the American College of Healthcare Executives. In April 2013, the Baldrige Foundation created the Harry S. Hertz Leadership Award in his honor. He currently serves on the Advisory Group for VHA's Center for Applied Healthcare Studies and on the adjunct faculty of American University.



**Terry Holliday, Ph.D.**, was selected as Kentucky's fifth commissioner of education in July 2009. Dr. Holliday served as superintendent of the more than 20,000-student Iredell-Statesville school district from 2002 until 2009. Under his leadership, the Iredell-Statesville school district received the 2008 Malcolm Baldrige National Quality Award, which was created by an act of Congress in 1987 to recognize companies, organizations, businesses and other entities that have shown long-term improvement in quality and productivity. Dr. Holliday's previous experience includes serving as superintendent, associate superintendent, director of accountability, principal, assistant principal, director of instrumental music and band director in North Carolina and South Carolina. He currently serves as the president of the board of the Council of Chief State School Officers (CCSSO), a nonpartisan, nationwide, nonprofit organization of public officials who head departments of elementary and secondary education in the states, the District of Columbia, the Department of Defense Education Activity and five U.S. extra-state jurisdictions. He was named to the group's board of directors in December 2010 and has also served as the board's president-elect. In September 2011, Dr. Holliday was appointed to serve a four-year term on the National Assessment Governing Board. The board sets policy for the National Assessment of Educational Progress (NAEP), known as the Nation's Report Card. In June 2013, he was appointed to serve a three-year term on the Board of Overseers of the Baldrige Performance Excellence Program. The Board of Overseers, which consists of distinguished leaders from all sectors of the U.S. economy, is appointed by the secretary of commerce to advise the Department of Commerce on the Baldrige Program. Dr. Holliday is the co-author of *Running All the Red Lights: A Journey of System-Wide Educational Reform*. He earned a bachelor's degree from Furman University; a master's degree and education specialist degree from Winthrop University; and a doctorate from the University of South

Carolina. A native of Belton, South Carolina, he and his wife, Denise, are the parents of two children.



**Brad Jupp** is a Senior Program Advisor in the Office of Secretary of Education Arne Duncan. In that role he supports the development and implementation of policy on teacher and leader effectiveness. He came to the United States Department of Education from Denver Public School, where over 24 years he served as a teacher, union leader and senior administrator. Brad spent 19 years as a middle school language arts teacher, including four years in his dream job at the DPS Alternative Middle School.



**Sarah Kipling** is a research assistant in the Washington, DC office of the Carnegie Foundation for the Advancement of Teaching, where she contributes to a range of research and writing projects. Sarah worked as an elementary school teacher in Chicago through Teach for America. She worked in the District of Columbia's Office of Human Capital under an Urban Education Leaders Program internship. She co-authored a new Colorado school finance formula while working with State Senator Mike Johnston as an Urban Leaders Fellow. And she helped develop a teacher instructional coaching program for the Ithaca City School District. A Pittsburgh native, Sarah has a bachelor's degree from Oberlin College, where she double-majored in English and Spanish and graduated with Honors in English, and a master's degree in public administration from Cornell University.



**Paul G. LeMahieu** is the senior vice president for Programs and Administration at the Carnegie Foundation for the Advancement of Teaching and is graduate faculty in the College of Education at the University of Hawai'i – Mānoa. With degrees from Yale College (AB), Harvard University (EdM), and University of Pittsburgh (PhD), his scholarly interests focus on educational assessment and accountability as well as classroom learning and the professional development and policy environments that support it. From 2002 to 2010, Paul was director of research and evaluation for the National Writing Project at the University of California, Berkeley. Prior to that, he served as Superintendent of Education for the State of Hawai'i, the chief educational and executive officer of the only state system in the United States that is a unitary school district, serving over 190,000 students with annual budgets totaling over \$1,800,000,000. Paul has published extensively on issues as diverse as testing policy and practice; educational accountability; staff development; school effectiveness; nontraditional work roles for women; minority achievement issues; science education; and vocational education. He has received a number of major awards for his contributions to educational theory and practice from the American Educational Research Association, the Evaluation Research Society, the Buros Institute of Measurement, the National Association of Test Directors, and the Association for Supervision and Curriculum Development. He has been president of the National Association of Test Directors and vice president of the American Educational Research Association. Paul also served on the National Academy of Sciences' Board on International Comparative Studies in Education, and Mathematical Sciences Education Board. He is a founding director of the Center for the Study of Research on Expertise in Teaching and Learning, served on the National Board on Testing Policy, and the National Board on Professional Teaching Standards.





**Carmel Martin** is the Executive Vice President for Policy at American Progress. She manages policy across issue areas and is a key member of CAP's executive team. Before joining American Progress, Martin was the assistant secretary for planning, evaluation, and policy development at the Department of Education. In this position, she led the Department's policy and budget development activities and served as a senior advisor to Secretary of Education Arne Duncan. Prior to coming to the Department of Education, Ms. Martin served as general counsel and deputy staff director for the late Senator Edward Kennedy (D-MA) as chairman of the Health, Education, Labor and Pensions Committee. She also previously worked at American Progress as the Associate Director for Domestic Policy, and in the Senate as chief counsel and senior policy adviser to former Sen. Jeff Bingaman (D-NM) and special counsel to former Senator Tom Daschle (D-SD). Through her years in Congress, she worked on legislation related to education, welfare, health care, and other issues of national importance. Early in Martin's career, she worked as a trial attorney for the Civil Rights Division of the Educational Opportunities Section at the Department of Justice, as well as in the private sector as a member of Hogan & Hartson's education practice. There she counseled and represented school districts and institutions of higher education across the country. Ms. Martin graduated with a JD from the University of Texas School of Law and a master's degree in public affairs from the Lyndon B. Johnson School of Public Affairs. After graduate school, she was a law clerk to the Honorable Thomas M. Reavley, judge in the US Court of Appeals for the Fifth Circuit.



**Michele Meredith** is responsible for knowledge management work surrounding the A2i program. She previously spent four years teaching high school English at Explorations Academy in the South Bronx, beginning as a Teach for America corps member. She holds a MS in secondary English education from Lehman College, a BA in comparative literature and French from the University of Michigan, and is currently pursuing an MA in international affairs at Columbia University.



**Jeannie Myung** is a senior associate, directing the Student Agency Improvement Community and the Advancing Teaching – Improving Learning (ATIL) program at the Carnegie Foundation for the Advancement of Teaching. She manages the Carnegie Knowledge Network on Value-Added Methods and Applications, a partnership of scholars and educational leaders dedicated to addressing critical technical issues around measuring teacher effectiveness. At Carnegie, she also leads 90-Day research cycles to investigate issues relevant to the design and implementation of teacher evaluation and development systems in states and districts. Previously, she has worked as a researcher for the Teacher Pathways Project, the Center for Education Policy Analysis, and the Institute for Research on Education Policy and Practice. Her publications have focused on school district human capital practices that work to build and sustain stronger teacher and principal workforces. She began her career as an elementary public school teacher in San Jose, California. Jeannie holds a BA in political science from Yale University and a PhD in administration and policy analysis from the Stanford University School of Education.



**Rocco Perla** is Founding Director of the Regional Innovation Network at the Centers for Medicare & Medicaid Services within the United States Department of Health & Human Services. In that capacity he provides policy and operational leadership for the network across the 10 CMS Regional Offices around the country and its 4,000 employees. He previously served as Director of the Learning and Diffusion Group at the Center for Medicare & Medicaid Innovation (CMMI), where his team established the learning system

architecture now used to support all new models being tested in the United States under CMMI's statutory authority. Prior to federal service, he spent 15 years in the UMass Memorial Health Care System where he held numerous senior leadership positions and was part of the management team that established the system's first Innovation Center focused on the principles of lean management and improvement science. Dr. Perla is Assistant Professor of biostatistics at the University of Massachusetts Medical School in the Department of Quantitative Health Sciences. His academic training includes a B.S. in health sciences, an M.A. in biology and an Ed.D. in mathematics and science education from the University of Massachusetts at Lowell. He completed post-graduate training in biostatistics and clinical effectiveness at the Harvard School of Public Health and was a 2008-2009 George W. Merck Fellow at the Institute for Healthcare Improvement.



**Elena Silva** is a senior associate at the Carnegie Foundation for the Advancement of Teaching, where she contributes to the foundation's research and writing projects and represents the foundation and its work in the Washington, DC education policy community and nationally. She comes to Carnegie from Education Sector, where she was a senior policy analyst researching and writing on a wide range of educational issues, including public school staffing, scheduling, assessment, and the role of teachers' unions in reform. Earlier in her career she was the director of research for the American Association of University Women, where she led national research initiatives

and wrote related research reports on gender equity in science and technology, higher education, and the workplace, and managed the Foundation's research grants portfolio. Silva developed and directed one of the first AmeriCorps service programs in the United States for the ASPIRA Association. Silva holds a master's degree and a PhD in education from the University of California-Berkeley, where she taught undergraduate courses in urban education, high school reform, and qualitative research. She holds a bachelor's degree in sociology and anthropology from the University of Massachusetts-Amherst.



**Holly Szafarek** is the program coordinator for the Learning Teaching program at the Carnegie Foundation for the Advancement of Teaching. Before joining the Foundation, she worked at the University of Michigan School of Public Health in programs supporting public health workforce development. She holds a Bachelor's degree in language, literature, and writing from Eastern Michigan University and a Master's degree in public administration from San Francisco State University.



**Ana Tilton** has more than 30 years of experience across the education spectrum including work as an educator, administrator, researcher, and grantmaker. She has brought her voice to the most pressing issues in education locally, nationally and abroad. Ana has served public education from all angles in partnership with many organizations—public, private and foundations across the country—and through those partnerships has helped to develop

several quality public and private school options for learners of all ages. She is committed to equity and diversity in education, driven by her own personal background as someone who has lived the life of the young people GFE and its members are working so hard to impact.



**Thomas Toch** is senior managing partner for public policy engagement at the Carnegie Foundation for the Advancement of Teaching. He brings policy expertise to Carnegie’s initiatives to strengthen the K-12 teaching profession, improve the success rates of students in public higher education, and rethink the relationship between research and practice in American education. Previously, Tom co-founded and co-directed Education Sector, a leading independent think tank in Washington, DC. He spent three years as a guest scholar at the Brookings Institution. And he has taught at the Harvard Graduate School of Education and authored two books on American education, *In the Name of Excellence* (Oxford University Press) and *High Schools on a Human Scale* (Beacon Press). Tom spent a decade as the senior education correspondent at *US News and World Report* and has contributed to *The Atlantic*, *The New York Times*, *The Washington Post*, *The New Republic*, *Newsweek*, *The Wall Street Journal*, *New York Magazine*, *The Wilson Quarterly*, *The Los Angeles Times*, and *The Washington Monthly*. His writing has won numerous prizes, including the Harvard Kennedy School of Government’s Goldsmith Prize, the Casey Medal for Meritorious Journalism, the Society for Professional Journalists Public Service Award, and several awards from the Education Writers Association.



**Taylor White** is an associate at the Carnegie Foundation for the Advancement of Teaching’s Washington, DC office, where she has a range of research and writing responsibilities. Taylor has served as a policy fellow at Jobs for the Future and has taught in public and private schools in the U.S. and in Oslo, Norway, where she was a Fulbright Fellow during the 2010-2011 school year. While in Norway, Taylor also managed an English language immersion program sponsored by the U.S. Embassy. She holds a master’s degree in education policy and management from the Harvard Graduate School of Education and is a *cum laude* graduate of Bowdoin College, where she was an all-American lacrosse player.



**Judy Wurtzel** is a Senior Advisor to the Noyce Foundation and an independent consultant on education policy and programs. From 2009 to 2011, Judy served in the U.S. Department of Education as Deputy Assistant Secretary for planning, evaluation and policy development and then as the founding Co-Director of the Department’s new Implementation Support Unit designed to support systemic and coherent state reforms. Immediately prior to joining the Department, Judy was Co-Director of the Aspen Institute Program on Education and Society. Wurtzel previously was Executive Director of the Learning First Alliance, and served as a senior advisor at the US Department of Education during the Clinton Administration, working on a wide range of elementary and secondary education issues. Judy also taught English in a Moroccan high school as a Peace Corps volunteer and practiced law for several years. Currently, she is on the boards of the Urban Teacher Center, the Achievement Network, and the Advisory Board of College Summit of the National Capital Region.