

Chief Innovation Officer Toolkit



EXECUTIVE SUMMARY

We are at a critical moment in public education in America as districts rise to the challenges presented by the COVID-19 pandemic. Across the country, education systems that were created to support traditional models of in-person learning have taken on enormous amounts of change and uncertainty, pushing past the status quo to try new things, conduct rapid feedback cycles and iterate.

Yet, most districts struggle to address persistent equity issues. The systems-change work required to reopen and rethink schooling has exposed district equity challenges. Differences in student and family experiences—across school access, program options, school quality, wrap-around supports and other factors—are representative of entrenched systemic inequities compounded by the pandemic.

It is time for districts to use innovation to address the inequities families face. Many districts have a commitment to equity and innovation but what that looks like in action varies greatly. We know that creating and nourishing new ideas that address school, district and ecosystem gaps have the power to expand opportunities and improve outcomes for all students regardless of their identities and zip code.

Districts can develop a theory of change that places equity and innovation at the center. As district leaders take stock of the challenges and progress this year, there is an opportunity to consider systemic shifts that will create more equitable experiences and outcomes for students. To do this work effectively, however, districts need senior leaders responsible for developing an innovation agenda and leading these efforts.

Chief Innovation Officers (CIOs) have the critical role of creating the right conditions to embed innovation for equity in their district. Designing the role itself to be agile and adaptive helps ensure the flexibility to address the challenges of systems-change work.

This research-backed toolkit is designed to help districts, and CIOs, make strategic decisions about their needs. Through research with school, policy and national leaders we've identified four core workstreams, five essential competencies and four key mindsets of a successful CIO:

CIO CORE WORKSTREAMS



- 1 Vision Setting
- 2 Research, Design and Evaluation
- 3 Partnership Cultivation and Management
- 4 Systems Change

ESSENTIAL COMPETENCIES OF A SUCCESSFUL CIO



- 1 Managing Mission and Vision
- 2 Systems Orientation
- 3 Political Savviness
- 4 Interpersonal Skills
- 5 Communication Skills

KEY MINDSETS OF A CIO



- 1 Belief that systems can be redesigned to be more equitable
- 2 Commitment to continual learning and growth
- 3 Curiosity and creativity
- 4 Assets-based focus on collaboration

EXECUTIVE SUMMARY

Who Should Read this Toolkit?

The CIO toolkit was developed for those currently in, hiring for or aspiring to be in a CIO role. The toolkit provides guidance and reflection questions to support districts that are creating the infrastructure to innovate for equity. Superintendents, district leaders and team members, school board members and the broader school community may find this toolkit a useful guide to understand why a CIO is a critical cabinet-level role and what should be expected from one.

In This Toolkit

This toolkit was developed using desk research; interviews with current and former district, policy, philanthropic and nonprofit leaders; and the experiences of the authors and collaborators. This process yielded four core workstreams, five essential competencies and four key mindsets of a successful CIO. The toolkit also contains resources to help districts create, hire, rehire and reflect on the role and its potential for impact.

Acknowledgments

This toolkit was authored by Margo Roen at Education First. It is the result of collaborative efforts among numerous people, and we owe deep gratitude to the following project team members and partners at The Broad Center and NewSchools Venture Fund: Andrea Foggy-Paxton, Ariana Valenzuela and Miho Kubagawa. We also extend a special thanks to Cristina Diaz-Torres, Frances Messano, Jason Weeby, Michael Stone, Scott Benson and Shannon Murtagh for their guidance and feedback throughout the development of this toolkit.

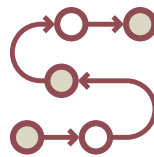
Toolkit at a Glance



**Innovation's
Role in this
Moment**



**The Need for
Chief Innovation
Officers**



**CIO Core Work
Streams**



**Essential
Competencies of
a Successful CIO**



**Key Mindsets
of a CIO**

INNOVATION'S ROLE IN THIS MOMENT



We need innovation in schools because times have changed, our children have changed. Districts and schools need to innovate—it's the only way to move forward.

—SARAH CARPENTER, EXECUTIVE DIRECTOR, THE MEMPHIS LIFT

The pandemic is disrupting the 2020–21 school year, and states and districts are struggling to ensure students can receive high-quality instruction. Preliminary estimates from the Brookings Institution suggest that, on average, students began the 2020–21 school year with only 70 percent of the learning from the previous year compared to a typical year.ⁱ This past spring, only 60 percent of low-income students were regularly logging into online instruction compared to 90 percent of high-income students.ⁱⁱ The COVID impact is real, and for students from low-income families, the slide may be especially harmful. Simultaneously, the national reckoning of systemic injustices calls into question how school districts are creating equitable, just systems, and addressing their own ways of supporting (or potentially inhibiting) students of color. One study found that of 124 school districts and charter management organizations, only 18 percent mentioned the current racial climate in their 2020–21 school reopening plans and only half of those districts explicitly mentioned addressing racial equity in the coming year.ⁱⁱⁱ These two challenges—one that is current and one that is perennial—dovetail with a need to innovate for equity to avoid making existing gaps even worse. As one national researcher remarked, “If we don’t innovate next year, our kids are going to pay.”

School systems are all finding themselves forced to innovate in response to these current crises. Some are doing so despite rigid system constraints. Others, however, are doing so as part of a broader, pre-existing strategy focused on community-driven, innovative solutions to make their system more equitable for every student. Doing so requires system agility and a willingness to listen and try new approaches. As one former district leader shared, “In a limited number of instances, systems are pulling up and saying if we need to reinvent, let’s do that holistically. Most systems are so stuck on the how, that they aren’t thinking at all about the why or the what.” With the disruptions to school and life as we know it, systems have an obligation, and an opportunity, to innovate with and for those they serve.

Even before the complexities of COVID-19, major challenges existed at the systems level and school level (e.g., teacher shortages, persistent opportunity gaps) that districts have struggled to address, especially at scale and sustainably. These same challenges persist after school reopening and will likely be exacerbated even further. District innovation is a key lever to equip systems to effectively serve every child and educator better, now and into the future.

INNOVATION'S ROLE IN THIS MOMENT



Innovation for Equity

Don't do innovation for innovation's sake. Do it as a means to drive equity.

—EMMANUEL CAULK, SUPERINTENDENT, FAYETTE COUNTY PUBLIC SCHOOLS

Education systems are plagued with systemic inequities because they are rooted in a history of racism.^{iv} Structural racism shows up in policies, practices and mindsets that, ultimately, often lead to differences in outcomes and access to opportunity.^v Innovation rooted in equity helps districts create a broader shared ethos and redesign structures to shift power to communities, educators and the students they serve. With a focus on equity is a commitment to ensuring all students have access to, and the appropriate support and tools to thrive in, high-quality educational opportunities. As shared in the *U.S. Education Innovation Index*, “to reverse the trend of widening achievement gaps, we’ll need new and improved education opportunities—alternatives to the centuries-old model for delivering education that underperforms for millions of high need students.”^{vi} Development of innovative, equity-driven governance and school models, designed by and with families and educators, provide a way for new ideas and solutions to emerge and grow.

Equity-driven innovation will ensure that each student is well-served by the education system but why, how and where that innovation happens varies greatly from district to district. Where and how does a district start to address its own inequity? The district’s theory of change—captured in their mission, vision and goals—and outcomes can point to where to start. As one superintendent explained, the “precursor for innovation is to understand the ‘why’ rather than to just innovate for innovation’s sake. The system needs to be designed to really speak the truth to itself. You need to understand where you might not be living up to your mission.” To innovate for equity—and therefore provide solutions to the challenges of this moment and historical systemic inequities more broadly—districts must have clear

The Role of Shifting Power

Equitable, user-centered innovation processes bring parents, educators, community members and other stakeholders into the innovation process in ways that are, perhaps, deeper than the district is used to and require transparency into how the district works. This work helps districts understand the problems they seek to address more deeply, surface the root causes of those problems and explore and develop solutions in partnership with the users. Ultimately, innovating for equity takes a true commitment to shifting power to others as key problem solvers, empowering them to be partners in redefining schools.

Structural changes are needed for districts to implement lasting redesign—even if the vision is there at the school level, it is important that district and community leadership is bought into it as well.

—BRETT ALESSI

goals for innovation, understand how innovation can help create new solutions and more equitable systems, and use a focused process to surface innovation needs.^{vii}

INNOVATION'S ROLE IN THIS MOMENT



Innovation vs. Continuous Improvement

There's always a need for continuous improvement. Innovating is important, but you can't be transformational in all things at all times.

—TABITHA BRANUM, DEPUTY SUPERINTENDENT, RICHARDSON INDEPENDENT SCHOOL DISTRICT

Innovation requires the introduction of something new and the need for something new starts with the district's continuous search to do things better. As a national policy researcher shared, districts should always be on the search for what they can do more effectively: "District innovation has to be a continuous process, not a thing unto itself. It's not about just coming up with a few school models, but really about getting *all* schools and educators engaged in continuous improvement." There is a link between continuous improvement and innovation, but they are not one in the same.

But how does a district think about innovation *and* continuous improvement concurrently? With capacity constraints, multiple district priorities and the need for extensive, authentic engagement to source solutions, it is important that districts focus their innovation energy.

When districts do not focus their innovation energy, it shows up in two different ways. First, some districts innovate for innovation's sake, rather than leading with a specific problem they are trying to solve. This approach can foster new ideas, but may not actually address inequities or can be unpopular or unsustainable, as innovations are not tethered to any tangible needs. Second, districts can mischaracterize minor improvements to current programs and systems as "innovations" when they are actually utilizing a continuous improvement strategy. This misnomer may lead to incremental changes, but is unlikely to yield the transformational results needed to address systemic inequities.

Instead, it is helpful for districts to begin by identifying a prioritized list of things to solve for. Then—based on capacity, resources and expertise—decide where to focus district efforts on transformative new ideas, versus what should evolve through a disciplined con-

Designing for Equity

Approaching problems and solutions from the perspective of the people "at the margins" or those with the closest proximity to the problem yields diverse stakeholder viewpoints. These perspectives help district leaders understand their context and needs, deepening their ultimate analysis of the landscape. To do so, first create an equity framework which outlines a shared understanding of key terms and explicitly acknowledges how equity will be attended to at each phase of the design work. From there, districts can employ user-centered, equity-focused design principles. For example, the [Equity By Design framework developed by Dr. Christine Ortiz](#), argues that because systems of inequity have been designed, they can be redesigned and shares a methodology that combines the consciousness of racial equity work with the methodology of design thinking. This equitable approach helps users both understand their own perspective and implicit biases while leveraging tools to develop solutions.

tinuous improvement cycle. As one CIO shared, "Innovation is a companion to all of the other continuous improvement work." And similarly, all innovations will need to use continuous improvement to make them better through implementation and scaling.

INNOVATION'S ROLE IN THIS MOMENT



Enabling Conditions for District Innovation

Every school district needs to have one eye on the future.

—**BABAK MOSTAGHIMI**, EXECUTIVE DIRECTOR OF INNOVATION AND PROGRAM IMPROVEMENT,
GWINNETT COUNTY PUBLIC SCHOOLS

Having one eye on the future takes intentionality, and it is easy for district leaders to be caught in the daily fires, opportunities, and requests of today. Developing **organizational ambidexterity**—in both ethos and structure—enables that future orientation. By specifying district leaders who can be focused on exploration, the district creates a balance between current execution and future exploration. As one district leader shared, “We are so focused on the fires today that we forget that if we are not thinking about what is next in a real and balanced way (with enough bandwidth, people, money), we will not be able to keep up.” Anyone leading innovation efforts in the district should also test out the system’s willingness to innovate around something small and collaborate to see that small thing through. The CIO has to go beyond innovating in their “lab” to designing for integration down the road, forecasting across the whole system the future direction while staying attuned to the work other district leaders champion.

Regardless of how a district makes space to look ahead, the reality is this: the larger system is often resistant to change. Creating the enabling conditions for innovation to thrive starts by addressing that resistance. As one former teacher shared, “The longer I stayed around and saw friends and colleagues take on senior leadership roles, especially in school districts, I could see that their potential to affect change was throttled by layers of bureaucracy and special interests.”

Innovation Readiness

Innovation, with a focus on research and development of ideas, should be a core function of any district. However, if the conditions are not right these efforts may be in vain. Things to consider to determine a district’s readiness to innovate:

- Is there a forcing mechanism to rethink district systems and schooling more specifically?
- Are there incentives to spur the district to innovate and take bold action? (e.g., Federal grant opportunities, local demand for a new type of school model)?
- Do district leaders—both senior leadership and the school board members—value innovation and see the need for it in their district?
- Are there existing relationships with parents, educators and other partners that can be better leveraged and empowered to join the district in innovation and redesign efforts?

A district does not have to have all of these conditions in place to innovate, however doing so without attention to these areas will likely thwart the development and implementation of new ideas.

INNOVATION'S ROLE IN THIS MOMENT



To break through the bureaucracy, districts can learn from and root their work in the interests and demands of educators, parents and students. “The central office needs to start by creating space for innovation to happen and then let the vision be driven by educators and community,” shared one national leader. Using equitable design practices, like empathy interviews, will ground the innovation in the needs of the broader school community. Districts and states can also learn from other industries when they consider how to innovate. Some key cross-sector takeaways are: 1) research and development is critical, 2) not every innovation will be a “winner” and 3) the innovation should have clear metrics to assess its impact.

Finally, creating enabling conditions for innovation means knowing the constraints. District talent, finance and operations teams that must adhere to legal mandates and policy requirements are also the ones most likely to be taking on innovation activities. Creating flexibilities in these core areas requires knowing relevant laws, being able to differentiate legal requirements from district created policies and finding the parameters and opportunities in each of those core functions.

These flexibilities often manifest as autonomies for schools. But like innovation, autonomy for autonomy's sake does not work. “The system is not designed for schools to exercise autonomy,” shared one CIO. “The assumption that autonomy, in and of itself, is sufficient is wrong. Leaders need support in understanding and deploying autonomies meaningfully. Every single division needs to be involved. It has to be systems reform to have an impact.” Real and lasting change requires technical changes within the district, including contracts and policies that allow for autonomies and decision-making power at the school level.

Creating the conditions for innovation to thrive in a district takes intentionality, an understanding of the work in each division of the system and strong leadership. Leading an innovating school district requires a clear mission for the work and data to shine a spotlight on what is working and the challenges of the district. A district adopting a theory of change that places innovation and equity at the center creates systemic ways to reinvent their work in partnership with those inside and outside of the system.



INNOVATION'S ROLE IN THIS MOMENT



Why is it important to be an innovating school district?

An innovating district is one that continually looks for opportunities to get better and sources a wide range of solutions to address their needs. Inherent in an innovating district is a **learning organization** orientation and a commitment to valuing ideas that come from outside of the system. This mindset is critical to developing the new ideas necessary to transform the system, **updating it for the future of learning** and developing systems and opportunities that are designed for the success of all students. The reality is, a single-source district focused on incremental change may lead to continuous improvement but will not facilitate the paradigm shifts necessary to address issues of equity and the changing world in which our students will lead.



A traditional school district	An innovating school district
Views schools as a fixed asset and investment regardless of conditions or performance	Knows the conditions necessary for schools to be sustainable and views school operations as dependent on performance and conditions
Deploys a “one best system of schooling” and has a small range of options to improve performance of schools (e.g., replacing school leader) or subgroups of students (e.g., intervention blocks) that are not thriving in that one system	Actively works to create a diverse array of options for students and families—both across schools and in the range of school-based programs—to meet the needs and interests of every student
Expects the school district to be the sole provider of services and decider of programs	Seeks partners to develop new programs and school models and involves others in partnership decisions
Develops new ideas internally and then works to create buy-in for those ideas	Expects new ideas and solutions to come from many sources
Sees only the students in their traditional, directly-managed schools as their own	Sees all kids in the broader ecosystem as their kids, including students who attend charter schools or other unique district options



THE NEED FOR CHIEF INNOVATION OFFICERS

We have complex, intractable challenges that we must overcome. These challenges need bold solutions. We empower our innovation office to launch, pilot, test and ultimately scale up ideas that become solutions to disrupt the status quo and accelerate student achievement. Leaders must be strategic, bold and, most importantly, vested in a continuous problem-solving approach.

—MOHAMMED CHOUDHURY, CHIEF INNOVATION OFFICER, SAN ANTONIO INDEPENDENT SCHOOL DISTRICT

School districts across the country are appointing chief innovation officers (CIOs), or creating similar roles, to foster the enabling conditions for innovation to thrive. CIOs must possess a desire to learn from and shepherd new ideas coming from other districts, other sectors and, most importantly, educators and families. Doing this work also requires a deep and nuanced understanding of the large, complex school systems in which they operate. CIOs are charged with creating more high-quality, best-fit schools for the students they serve, which includes:

- Deep internal and external engagement to identify community interests and needs
- Cross-team leadership and coordination to support financial, talent and other resource shifts linked to increased autonomy and accountability
- School-level engagements for new school design, rezoning and consolidations/closure
- Internal leadership to make the district systems nimbler and more responsive
- Ongoing blocking and tackling to reorient the systems in place to empower more decision-making at the school and parent level

Given this scope, and the high-profile nature of the work, the role requires change management experience, deep community acuity and the skill and will to design and oversee a diverse portfolio of school options in a nimble system of schools. As one superintendent shared, “Maybe ten years ago it was optional to have a CIO role; now it is critical and necessary.”

Some might argue that the work of the CIO is actually the responsibility of the superintendent or express concern for adding another leadership team role to the district cabinet. What is most unique and necessary in the CIO role is the ability to strategically look ahead and create new ideas to be future-ready. The CIO is tasked with creating and launching bold new ideas amidst the day-to-day demands of the district’s current operating conditions.

Superintendents that do not have a Chief Innovation Officer or similar role should ask themselves if anyone in their district focuses entirely on innovation work and *how* new ideas are surfaced in their district.^{viii} Are district decisions opportunistic or strategic? Reactive or proactive? One-off or cyclical and transparent? One superintendent shared, “Having a CIO role with a direct line to me is important—the role is designed to have agility and adaptability and needs to be able to pivot quickly. The CIO needs the superintendent to be informed and to continue to be a champion [...] and give cover for the innovation work to happen.” This division of roles—a CIO responsible for leading the innovation process, separate and distinct from a district leader serving as the innovation champion—ensures that there is space for innovation and a steady, singular focus on that work’s priorities, design, execution and impact.



THE NEED FOR CHIEF INNOVATION OFFICERS

The division also allows space for healthy tension between these two roles and enables the CIO to push colleagues to think differently. The CIO serves as both a source of inspiration for how district leaders can think differently and a galvanizing force to push people to move beyond their comfort zone and question aspects of their work they may be resistant to change. While the division of roles is important, the most successful CIOs have a symbiotic relationship with the superintendent. One former CIO highlighted the interdependencies, sharing that “You can have a CIO, but unless you have a superintendent and board who are actually open to fundamental change, you will just be tinkering around the edges.”

A smaller district may have difficulty appointing a CIO or may create the role without the resources to fully staff a team under that leader. It is possible for a district to focus on innovation without a CIO role. In that case, those districts either need to build innovation into the underpinning of their system—from shared ownership of the leadership team down to the policies and processes their staff execute—or they have to have someone lead the work. In determining the organizational structure to support innovation, be mindful of the purpose of the CIO role, as summarized by a former CIO: “The intent behind this position is three-fold: trying to launch new initiatives, trying to do what you are doing but better and trying to save money and be more efficient.” Without someone focused specifically on how to choose, implement and spread innovations, the district is likely to end up with one-off programs that may or may not create a transformative experience or improve outcomes for students.

Having a CIO role that reports directly to the superintendent is the most likely way to set up district innovation work for success in creating sustainable, equitable, systemic and transformative solutions. One researcher interviewed remarked, “The CIO should report to the superintendent. Otherwise it is an initiative tucked away and it is too easy to ignore. Either you are serious about innovation or you are not—having the direct ear of the superintendent signals to people that they need to be all in.” Direct

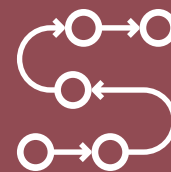
Measures of Success

The CIO’s work can be measured on a range of outcomes unique to his or her context and district needs. Each innovation that is designed and launched through the CIO’s work should have a clear intended impact against which to track success, as well as an understanding of leading and lagging indicators. Key metrics to consider in the evaluation of a CIO are:

- Data to support that innovations developed and launched are reaching, or on track to meet, their intended impact
- Systems-level shifts to support innovation, evidenced by new processes (e.g., clearly codified menus of services across each department, unified enrollment systems) and organizational structures (e.g., ambidextrous organizational design, capacity of the CIO’s team)
- Demonstrable shifts in district engagement and design efforts that give voice to a broader community and collaboration with partners
- Return on investment analysis to understand utilization of resources and the scalability of innovations implemented

Contextualized goals for the CIO’s work should be set and measured as a part of the superintendent’s annual performance review of each Cabinet member.

reporting positions the superintendent as the champion of the innovation work, ensures the CIO has a seat at all cabinet-level meetings and positions the CIO to have the internal and external influence to navigate the complexities of his or her work.



CIO CORE WORKSTREAMS

There is something about the role of the CIO or senior leader that is inclined toward an optimistic sense that ‘moments are laden with opportunity.’ Even for the best of us, the default under stress is merely to manage: mitigate risks, avoid landmines and keep moving forward. A great CIO scans every situation for opportunity.

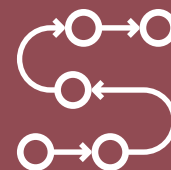
—ANDREA CASTAÑEDA, CHIEF INNOVATION OFFICER, TULSA PUBLIC SCHOOLS

Finding opportunities in the district and intentionally leading district innovation for equity takes collaboration and building anew. New partners, structures and policies are needed to bring new ideas into the district and support their growth. The CIO role is deeply rooted in the needs and capacity of each district and community and therefore can take on a wide range of responsibilities depending on the local context. As Horn and Olivieri note, “Spotting a CIO is easier than defining what he or she might do. [Duties] can range from managing the process of innovation

inside an organization to ushering in an agenda of change management more broadly, and from generating innovative ideas to spotting and spotlighting innovative ideas from others.”^{ix}

Though the role is shaped by local context, there are four core workstreams that all successful CIOs oversee: vision setting; research, design and evaluation; partnership cultivation and management; and systems change. They are all rooted in data, community interests and opportunities to look ahead to the future.





CIO CORE WORKSTREAMS

Vision Setting

Every district has a multi-year strategy and mission for their work and impact, and the CIO must surface barriers to realizing that mission and lead internal systems change to eliminate those barriers. To effectively lead innovation work, the CIO needs to start with the baseline:

- › What is the shared vision for the district? How has the district created engagement processes and structures for a wider range of constituencies to develop that vision?
- › Is there a shared definition of what a “quality school” is in the district? Is there a school tiering system to identify ways to differentiate supports and interventions for schools across the district?
- › Where are the learning and equity gaps across the district?
- › What are the strengths of the district? What do we know about what is working and why?
- › How do families access the system, and how can you make access easier for families?

The CIO must use the broader district mission, the baseline data, known barriers and gaps in the system, and constituents’ wants and needs to develop a vision of what could be. This vision is a catalyst for systems change and guides the active management of a portfolio of schools. And, if there is not one in place, this vision should be operationalized through a shared school performance framework that clearly tracks against measures of success. This vision is the “why” behind the innovation work and can be used to galvanize internal and external allies as problem solvers in the work using actionable data.

Defining the north star reimagines the focus of public education to rely on a wider set of outcomes for a wider range of students. The ‘what’ and ‘how’ then change dramatically.

—ALYSSA WHITEHEAD-BUST

Reflection Questions:

- › Why are we innovating?
- › What data and input drives that innovation, and how do I help champion that need or voice to shepherd this work forward?

Research, Design and Evaluation

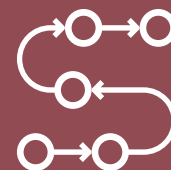
Once you understand the “why” behind your innovation work, innovation follows a set process: research, design and evaluation. The CIO must research new solutions from a range of sources, including more traditional desk research on ideas inside and outside of the education sector, and through design thinking processes focused on user experiences. Developing and sharing a district-wide innovation agenda invites more people to the table to surface potential solutions and new ideas. This in turn helps the CIO identify needs by authentically empathizing with students, families and communities. Additionally, the CIO needs to have an eye for qualitative and quantitative data and must be able to do a root cause analysis. In a small system, the CIO needs to be able to directly do research and analysis, whereas in a larger system, they need to be able to request research and interpret the findings. The ongoing evaluation of the district’s historical work and the impact of newly implemented innovations ensure thoughtful learning and solutions design.

The CIO needs to have an eye for data, a curiosity for data, and be able to do root cause analysis. He or she needs to be able to do research or ask the right questions of the research and analytics department, and be able to present that data to educators. What is the data telling us? What do we need to learn?

—EMMANUEL CAULK

Reflection Questions:

- › How are you sourcing new ideas in your district?
- › What do you know about your own district’s data, both from the quantitative and user perspective?
- › What else would you want to know about your district?



CIO CORE WORKSTREAMS

Partnership Cultivation and Management

Once the CIO has developed the “why” behind their innovation agenda and surfaced potential solutions, they must cultivate new strategies. To bring additional capacity, expertise and fresh perspective, CIOs often develop strategic partnerships to create and execute solutions to meet district needs. The sources of these strategies and partnerships can be wide ranging—for example, partnering with external nonprofit organizations to develop new school models and modes of instructional delivery, building processes and supports for educators internal to the system to develop and test new ideas, and partnering with existing nonprofit organizations to pilot an innovative program in a school or across campuses. The emphasis here on cultivation denotes the active role the CIO must play in communicating out their needs and creating paths for new strategies, programs and partners to come to fruition. The CIO needs to effectively manage those partnerships in ways that foster the right balance of expectations, autonomy and coordination.

You're asking the best leaders in the system to develop solutions to expand their impact instead of promoting them to central office. To do so, you have to know who they are, support them and create the opportunity.

—CHRIS BARBIC

Reflection Questions:

- ▶ Who do you involve in solutions development and implementation?
- ▶ How are you supporting their efforts in the design, testing and launch of promising new ideas or new models for educational design and delivery?

Systems Change

The efficacy of the CIO comes down to their ability to lead internal systems change. They must create the conditions and systems for new solutions to be tested, codified and spread across the district. The structure of the district itself can get in the way of innovating for equity at the systems and school level. If a district implements one-off fixes and fails to create the systemic conditions for innovation, it will make bright spots hard to replicate and scale and can undermine the sustainability of those individual efforts. Creating the conditions and systems for innovation is an exercise in silo-breaking and trust-building. The CIO should reinforce and facilitate the innovations across all departments—with an emphasis on those that impact people, academic models and funding—and make sure they move cohesively in support of new ideas. Creating successful conditions for innovation includes clarifying expected outcomes and providing the time and support needed to bring new ideas to fruition and assess their impact.

The key thing CIOs need to be successful is a district culture where innovation is embraced and change is accepted. This enables CIOs to push the limits of their district's capacity and form new schemas for how we manage our schools.

—DAVID SAENZ^{III}

Reflection Questions:

- ▶ When a promising school model or practice emerges in your district, how does it grow and scale?
- ▶ What are the barriers to innovation and scaling innovation in your district?

ESSENTIAL COMPETENCIES OF A SUCCESSFUL CIO



The CIO needs to understand the interdependencies in a school district, have the orientation to work collaboratively with leads across multiple functional areas and then be willing to do the hard work of alignment and coordination. If a campus leader is considering extending a school day, just as one example, there are real implications across a school system including transportation, operations, academics, facility usage and finance that must be planned for proactively to ensure successful implementation.

—ELLIOTT WITNEY

Regardless of the specific strategies that the CIO engages in, their main job is change management across the district. To do this work, there are five key competencies a successful CIO will utilize to carry out the work and achieve sustainable and effective innovations for equity. These include organizational competencies—managing mission and vision, a systems orientation—as well as relational competencies—political savviness, interpersonal skills and effective communication skills.

Competency 1: Managing Mission and Vision

A successful CIO must know why they are innovating and be able to keep that vision at the center of their efforts to collaborate across departments, engage educators and include the community in focused design efforts. The CIO must help people see a possible future that does not currently exist and lead the work to make that future a reality. For district innovation to succeed, expand and sustain through transitions in leadership, it cannot be top-down. The CIO must know how to listen to stakeholders and lead teams to take effective ownership of innovations and support their spread through the district.

The CIO's work includes helping people want something that they have never seen. It includes cultivating people's desire for the unseen so much that they are willing to work for it.

—ANDREA CASTAÑEDA

Reflection Questions:

- ▶ Why are we innovating?
- ▶ What is the root source of that innovation, and how do I help champion that need or voice to shepherd this work forward?

Competency 2: Systems Orientation

To make the system better at innovating for equity requires knowledge about how the system works. This includes understanding divisions and team members, the system as a whole and the broader ecosystem. This systems orientation requires insights about both the perceived and actual ways the system works. The CIO must be able to toggle between the theoretical and practical application of innovations within a system. Having this systems view can also reinforce cross-organizational collaboration, the future focus and strategic coherence between the exploratory and execution functions of the organization.

It was important to me that innovations have an impact across our district. It brings relevance and capital to all our work.

—DAVID SAENZ

Reflection Questions:

- ▶ What do you know about how your system works?
- ▶ Your ecosystem around the school district?
- ▶ Where is there visibility into how it works for outsiders, insiders and you?

ESSENTIAL COMPETENCIES OF A SUCCESSFUL CIO



Competency 3: Political Savviness

Politics and policies can often impede the implementation and sustainability of innovations even when they have a positive impact on student equity or are widely supported. The CIO must understand the politics within their district, effectively navigate the needs and dynamics of various stakeholders and build coalitions to support innovations for equity. Political savviness is also about shifting power to ensure equity for students and families who are often left out of the system. Sometimes exercising political savviness will mean quietly implementing a new approach to skirt opposition and only bringing fanfare once there are results to back up the effectiveness of the new approach. Other times it will mean gathering support from families, students and the teachers' union to make sure there is enough demand to convince district leaders of an innovation's importance. Whatever the strategy in a particular situation, political savviness is key for the CIO to actually get innovations in place and to spread them through a district. Without this competency, the CIO may have the right ideas, but they likely will not succeed in implementing them.

Ninety percent of my time is convincing somebody of something (either that we should or should not do something). [...] It's absolutely critical because engagement allows for others to buy-in to and check the idea to make sure it is a good one and makes implementation possible. It can obviously be frustrating, but it also sharpens the sword.

—BABAK MOSTAGHIMI

Reflection Questions:

- ▶ How are you working with those in positions of power to advance innovating for equity?
- ▶ What is your influence agenda and how are you working to share power to advance that agenda?
- ▶ How are you engaging with internal and external stakeholders?

Competency 4: Interpersonal Skills

The CIO must be able to build relationships and trust across a diverse group of people. They must be able to listen to stakeholders and effectively hear their needs, desires and concerns. And an effective CIO must be able to influence others. Because so much of the CIO's work is cross-functional and involves many levels of leadership, the ability to build relationships and buy-in is a crucial skill for success. Building relationships with colleagues in the central office, in other areas of the district and in the community takes up the bulk of the CIO's time. But it is key to other facets of their work such as sourcing, implementing and supporting innovative solutions. The CIO must have trust and support from everyone—principals, families, community and business leaders. It is not enough for the central office staff and the school board to be supportive. Without broad support to back initiatives, enable new ideas and support implementation, the CIO's work will fall flat. This is especially true for the spread and sustainability of innovations. Families, teachers and community members must be advocates. This means they need to feel the initiative supports their priorities and will be best for their children.

The most successful CIOs know the policies, politics, and have established relationships with others and are not perceived as an outsider. She takes the mindset of supporting all schools, not just those 'doing innovation work.' There is already trust established with her which goes a long way. She knows when to collaborate and knows when to push.

—NANCY BERNARDINO

Reflection Questions:

- ▶ Who are your stakeholders?
- ▶ How have you built relationships and trust with those individuals, internally and externally?

ESSENTIAL COMPETENCIES OF A SUCCESSFUL CIO



Competency 5: Communication Skills

The CIO must be able to communicate effectively. CIOs regularly present to various groups—from the school board to the most marginalized communities—and the CIO must be able to share information effectively, clearly and compellingly with any of these groups. Explaining “the why” behind an innovation, especially when stakeholders may feel they are giving something up to go in a new direction, is critical to get people on board. Similar to the political savviness competency, without effective communication skills, the CIO is unlikely to see their vision implemented and sustained, no matter how beneficial for students. It falls to the CIO to illustrate the vision that brings others on board with the challenging, and sometimes scary, work of innovating. Specifically, the CIO must have strong storytelling and presentation skills. Storytelling skills are how the CIO will bring people on board with why an innovation is worthwhile. This means using quantitative and qualitative data, as well as anecdotes of what the future could look like. Communicating up, across and throughout a school system and externally requires facilitating

conversations across stakeholders and pitching new ideas. The CIO must be a thoughtful communicator who can effectively present information and ideas to a single person or a crowd of hundreds because they will regularly have to do both.

Championing innovation comes with a big communications piece, especially celebrating promising practices and early proof points.

—ALYSSA WHITEHEAD-BUST

Reflection Questions:

- ▶ Who are the different audiences for your innovation priorities and how are you reaching them in a tailored and compelling way?
- ▶ How can you use storytelling—with and without data—to help more people engage with and get excited about your work?

I think if we educate parents on what innovation really means and how times have changed, then I think they will understand the need to do things differently.

—SARAH CARPENTER





KEY MINDSETS OF A CIO

The “why,” “what” and “how” of the CIO’s work are important and equally critical is the mindset of the CIO leading district innovation. In research and interviews, four mindsets consistently rise to the top as critical for CIOs to possess: the belief that systems can be redesigned to be more equitable, the belief in continuous improvement, curiosity and creative problem solving, and an assets-based approach to collaboration.

Mindset 1: Belief that systems can be redesigned to be more equitable

For the CIO to be a champion of equity and to move the district in new directions, they themselves must fundamentally believe that systems can be radically redesigned to be more equitable. CIOs often have an uphill battle to implement their ideas and to get everyone on board. Without a firm belief in the possibility of success—and their own ability to drive systemic change—they will not last through the role’s most difficult moments. This belief means CIOs understand the systemic injustices that currently disserve students furthest from opportunity and are therefore driven to disrupt those systems in service of transformational results.

This is the difference between being a change agent and being transformational. You can be a change agent and not be transformational. I can move change forward, but not fundamentally transform the status quo.

—TABITHA BRANUM

Reflection Questions:

- ▶ What do you believe to be true about the school system and your own role in it?
- ▶ What systemic challenges do you believe can be solved through user-centered design, and which, if any, do you think might need solutions outside of the school system?

Mindset 2: Commitment to continual learning and growth

This mindset is crucial for the CIO because it is what gives them the confidence to push the work forward. Innovation does not happen overnight. When introducing something new, there is a need to study, learn and pivot as necessary throughout implementation. A commitment to continual learning and growth allows the CIO to balance the various types of change that their district needs in a given moment with the relentless focus on impact across these efforts. They can simultaneously manage the innovations that are going well and need to be tweaked, the small innovations which might be the precursor to larger transformations and the fundamental shifts that are needed for new ideas that are not delivering. This helps maintain momentum and bring along stakeholders who are at different stages of adoption and support, thus allowing the CIO and district to put resources and focus on the highest leverage ideas.

The CIO role is a weird paradox of entrepreneur and regulator all in one. [She or he] has a strong regulatory function around clarifying performance expectations, monitoring against that, etc. while staying hungry to create new ideas and ways to do things better.

—CHRIS BARBIC

Reflection Questions:

- ▶ How are you learning and growing in your work?
- ▶ How do you think about, measure and continue to increase your impact through the innovations you implement?



KEY MINDSETS OF A CIO

Mindset 3: Curiosity and creativity

The CIO must crave new ideas. The CIO must feel the need to look beyond what is to what could be. Why is this critical? Because the CIO's chief job is to prepare their district for the future and to reimagine the major systems that are currently not working. The CIO must see beyond the typical ways of solving problems and ask how else the situation could be approached. Without a hunger for new ideas and new approaches, the CIO will get stuck trying to work within the existing structures of their district. They may make incremental changes that will not move the needle sufficiently for children to be more effectively served by their school system. Curiosity and creative problem solving drive the CIO's ability to imagine what's possible and effectively lead the core work.

There's more than one way to solve problems, and local context matters when deciding what to do. A critical value a CIO offers a school system is helping to identify different approaches that drive stronger outcomes. Whether these approaches come from other districts, the charter sector, or business and industry doesn't matter as long as they're effective in the local context.

—ELLIOT WITNEY

Reflection Questions:

- ▶ How are you learning about and exploring the potential challenges and solutions of the future?
- ▶ Where do you look for new ideas and how does that thinking stimulate new ideas to solve the issues of today in your district?

Your ability to think creatively is dependent on knowing an issue well.

—HAL WOODS

Mindset 4: Assets-based focus on collaboration

The CIO must have the humility and sense of self to give others credit for the work and build up their colleagues. While the CIO will simultaneously lead on several strands of work and may be the chief architect of those ideas, others must feel ownership over the work and the ideas for the innovation to be successful and to sustain over time. To that end, a successful CIO must approach their work by identifying each person's best skills and supporting those assets to move the work forward. A successful CIO must see collaboration as a critical part of innovation. They must be willing to share credit, or even give up credit, in order to help others be invested in and become advocates of a new approach. A CIO who feels the need to take credit or fails to collaborate will likely not see their innovations implemented. And they'll be even less likely to see them sustain through leadership changes or spread through the district.

Some people have a hard time giving up the credit. Ego can get in the way. But to lead innovation work you must be willing to realize that that idea is their idea. Or that I may have had the idea, but someone else made it happen and you need to let them take the credit."

—TABITHA BRANUM

Reflection Questions:

- ▶ What does leading with humility look like for you?
- ▶ How are you sharing ownership and credit for the innovative ideas being implemented and flourishing in your district?

RESOURCES

The following resources are available, along with the toolkit, at education-first.com/CIO-Toolkit/.

- › **Short self-assessment:** A rubric for CIOs and districts to identify opportunities for growth to expand impact
- › **Sample job description:** A job description to be used by interested districts as a model for writing their own CIO job description
- › **Suggested reading list:** A curated reading list for those looking to learn more about the future of work and innovation needs, CIO and district examples of their work and impact



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