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Values Driven Strategic Thinking and Planning in Federated Non-Profits

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Values Driven Strategic Thinking and Planning in Federated Non-Profits:
A Reading Partners Experience

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Thank you.

Abstract

This paper, as a reflective practice, will explore organizational models and frameworks commonly found in non-profit organizations, as per the Leading and Managing Social Sector Organizations course at SIT.

This paper attempts to draw on my experiences at the national non-profit, Reading Partners, and coursework from SIT to suggest the best decision-making models for a mission-driven, non-profit organization. The findings and reflections largely surround the methodologies of strategic thinking and planning for large, complex, federated organizations.

The paper first explains Reading Partners organizational structure, program model, and culture, as per the different organizational frames in Boleman and Deal in order to provide context to the reader. The paper goes on to highlight the author's experiences as a Program Manager at Reading Partners and observed challenges and changes over the course of the last three years. At the end of these reflections the author analyzes the effect of strategic planning on these events and the national organization as well as the affiliated sub-regions.

The question to be addressed in this capstone is, "Which decision-making model might best sustain a mission-driven, federated organization?" Over the course of the reflective practice period, the best answer comes from an analysis of strategic thinking and planning best-practices. In the analysis this paper will explore strategic thinking as a surrogate to decision-making models in organizations.

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Children Learn to Read Their World in Words: How I came to Join Reading Partners

I came to join Reading Partners in 2015, eager to make an impact, and to share all the things that I had seen and learned from my time at SIT in Brattleboro. At the outset of my journey at SIT I was absolutely certain that I would go to school so I could go back abroad. I had even chosen SIT because of World Learning's association with The Institute for Political and Civic Engagement in Myanmar.

In time it became clear to me that going back abroad was not what I should do with my newly honed skills, my talents, and newly tested knowledge. I decided to look for practicums in the United States.

By February of 2015, it had become customary on campus for me to abuse the privilege that my second work-study position afforded me, and to keep El Café open during odd hours for my fellow caffeine dependent colleagues while we searched for jobs and practicum positions. I began dutifully applying for positions that caught my eye. I was determined that I would hold a practicum that would pay me, ideally a livable salary, and that I could see myself staying in long-term. It was during one of these El Café days that my colleague, Jess McCue, shared a LinkedIn post that she wasn't interested in but thought someone else might be. It was for Reading Partners.

The posting was for a Program Manager. It called for someone who had served in AmeriCorps, which I had; someone who understood the public education sector, my undergrad degree was in Secondary Social Studies Education and I had briefly taught domestically and abroad. The posting also called for a person who had experience working with school partnerships, I had this as an Education Director with The Boys and Girls Clubs of Buffalo. I felt that I really was a perfect fit for the job; so, I began my pre-application research of them.

I found that the organization was largely staffed by former teachers, that it was a fairly young organization, and it seemed that the benefits were on par with most mid-sized to large non-profits I was familiar with. I decided I would apply and work towards the best results!

While studying for my M.A. in Sustainable Development I chose to further my social sector experiences by studying program management, multicultural team dynamics, training design and

critical pedagogical theory. I came to believe that students learn to read their world in words and that language shapes and is shaped, by our society. By extension, literacy is among the most important skills a child will cultivate over the course of their education. I have committed my entire professional career to working for the welfare of children and intend to continue in that pursuit after my coursework at SIT has come to an end. I am thankful that Reading Partners affords me that opportunity.

Introduction:

When I joined Reading Partners in 2015, the organization was, unbeknownsed to me, preparing for the largest restructuring and most painful transition it has seen to-date. My experience over the course of my first year with the organization was turbulent, under-supportive, and an all around difficult experience. During the most difficult of times I found that I still trusted the people, systems, and culture of the organization enough to believe that it would improve in time. I did use the research I referenced at the time, and the reflections I had gathered at the time with my colleagues and manager to get myself nominated to a Leadership Advisory Committee and to hopefully contribute something useful to the growth of this organization.

I was motivated to write this paper because I felt the need to better understand two things:

1. Why were things so turbulent at Reading Partners? What about my experience could explain this and how could I make sense of it?

2. Could I translate anything from my experience in this difficult transition to be useful in my career trajectory or to Reading Partners at large? What is the best decision making model for mission-driven non-profits?

It is my hope, that by responding to these prompts, I might be able to make a contribution that is both meaningful and useful to my colleagues, to Reading Partners as an organization, and possibly others.

Context: What is Reading Partners?

Before defining and analyzing Reading Partners' strategic planning process, it will be necessary to lay out the frame work of what Reading Partners is in order to contextualize my reflective practice and conclusions.

Founded in 1999 by three community leaders in Menlo Park, CA, Reading Partners is dedicated to creating a future where all children in the US have the reading skills necessary to reach their full potential (Reading Partners, 2018). In service of its partner schools, Reading Partners recruits and trains community volunteers to deliver individualized tutoring to students who are six months or more behind grade level in reading. Reading Partners' model is one of just a few such literacy supports that has been proven effective in multiple, rigorous, large scale, externally validated studies (Tepper Jacob, Robin, et al.). From 2012 to 2017, Reading Partners made significant investments in scaling its core model, nearly quadrupling the number of students served from 3,000 to 11,000. The organization stretched to reach more than 200 schools in 14 distinct regions, across 10 states and Washington D.C. (Reading Partners, 2018).

Reading Partners is a California-based, national non-profit. We work in under-resourced schools by empowering our school partners and communities with a research-based curriculum targeted to meet the needs of developing readers in our partner schools.

Program Model

School administrators, instructional coaches, or their classroom teachers, depending on the nature of our relationship with the school, first identify students for assessment. We then use a catalogue of literacy assessment tools to determine a students' reading proficiency, as well as tools to diagnose their specific literacy sub-domain strengths and sub-domain gaps. I.e. A student, who is developing their phonics skills, might also be developing their alphabet skills. These are referred to as sub-domains.

After identifying a student's sub-domain proficiencies we place them in one of our three research-based curriculums designed to meet the student's individualized needs. These curricula are divided into three main categories:

1) **Emerging Readers** – a game-based instructional curriculum that reviews alphabetic principals, phonics, and simple sentence-level comprehension.

2) **Beginning Readers** – a phonics-based curriculum that reviews phonics, phonemic awareness, sight words, consonant digraphs and introduces readers to other more sophisticated literacy concepts (e.g. best practices for paragraph level comprehension and story structure).

3) **Comprehension Readers** – a curriculum that introduces the reader to higher-order literacy skills reinforcing skills taught in preceding curriculum and expands on higher order literacy skills including identifying and relating to characters, story structure, distinguishing between fiction and non-fiction, and decoding an author's message. on students learning how to use literacy to extract meaning and information from text. Students learn to distinguish between fiction and non-fiction, how to identify topics, author's message, to summarize, and other comprehension-based skills.

After a student has been identified and placed in the curriculum, they are paired to one or more volunteers from the community who commit to working with that student, one-on-one, for one hour per week, for a period of three months to one school year. These volunteers are vetted for student safety by submitting to background checks and basic medical screenings as per school code.

After being vetted and paired to a student, a Reading Partners AmeriCorps Site Coordinator, will be responsible for managing the volunteer, and maintaining a reading center at our partner school.

Stakeholder Relationships

The key stakeholders in Reading Partners program and operations are numerous. In order to appropriately contextualize the impact of strategic thinking and planning it is necessary that I categorize and define them as follows.

1) Students: Our primary stakeholders are the students served by Reading Partners. These are students who are from under-resourced schools and communities who are six months, to two and a half years behind their peers in reading level.

2) School districts: In some cases Reading Partners has district level relationships with schools which allows us to better facilitate our programing and planning in any given fiscal year.

3) Principals: At the school level, Reading Partners maintains open relationships with school principals. This means participating in annual planning, staff development days, sharing student performance and program data with principals and administrative staff. Principals are the key relationship at the school level.

4) Teachers: Teachers predominantly interface with Reading Partners AmeriCorps Site Coordinators to plan out day-to-day tasks and operations.

5) AmeriCorps Members: AmeriCorps members make up the largest portion of the Reading Partners Program and Community Engagement teams. The majority of people who carry out day-to-day operations at Reading Partners are AmeriCorps Members. AmeriCorps Members are provided to Reading Partners as a part of a Federally funded grant from CNCS (The Corporation for National Community Service). AmeriCorps Members

commit to 1,700 hours of service over the course of one year for a stipend of $23,000 and

a $5,650 scholarship.

6) Community Volunteers: Our Community Volunteers are our largest stakeholder group.

In my sub region alone, we require over 1,300 volunteers to carry out our day-to-day

programming. Volunteers can range in age from 14 – retired. All of our volunteers must

be able to read and speak English but are otherwise from a diversity of backgrounds and

cultures.

Organizational Structure

Given the size and scale of Reading Partners, as well as its rapid growth over a short period of time, it is entirely necessary and sensible that its structural framework is best described as the Divisionalized Form. (Ref. Table 2)

Through most of this paper I will describe and analyze Reading Partners in the context of the structural frame. However, it should be noted that Bolman and Deal describe three other frames:

1. Structural Frame – The structural frame is an analytical perspective that examines division

   (differentiation) of labor and how groups with different responsibilities coordinate

   (integration) in an organization.

2. Human Resource Frame – The Human Resource frame is an analytical perspective that

   examines an individual person's "fit" into the structural system that is a complex

   organization. The Human Resource frame operates under the assumption that both the

   individual and the institution depend on one another to fulfill specific needs, and if the "fit" is

   not good, then one will be exploiting the other.

3. Political Frame – The political frame is an analytical perspective that examines the

   relationship of subgroups to power within an organization. The political frame operates

   under the assumption that groups of individuals can have competing goals, information, and

   resources. An organization has to make decisions, which requires an exchange of power.

The political frame analyzes the bargaining and negotiation that happens between groups competing for scarce resources with different goals.

4. Symbolic Frame – The symbolic frame is an analytical perspective that examines the relationship of individuals and the multiplicity of ways in which they will analyze events that happen in an organization. It explores not so much what happens, but what it means (Boleman and Deal, 2013).

Reading Partners is composed of fourteen affiliate "regions" across the country. Each affiliate is able to make their own decisions around people management and local organizational structure. A typical affiliate region, is a horizontal structure that is divided as follows:

1) Development – Responsible for fundraising, budgeting, and external partnerships and relationships.

   a. Executive Director – The leader of a Reading Partners affiliate. Executive Directors directly supervise all workers at the manager and associate level in their sub-region.

   b. Development Manager – The moneymaker of the organization. The Development Manager is charged with grant writing and reporting, as well as event planning and sourcing a diverse funding portfolio in co-operation with the Executive Director.

2) Community Engagement – Responsible for recruiting and retaining community volunteers that are essential to the Reading Partners Core Programing model.

   a. Community Engagement Manager – strategizes and plans volunteer recruitment efforts. Responsible for recruitment, background checks, and retention of community volunteers.

   b. AmeriCorps Volunteer Coordinators – provide technical support for day-to-day Community Engagement operations. This includes phone calls, community presentations, data management, and interfacing with Program Teams to place volunteers at Reading Center School sites.

3) Program – Responsible for maintaining Reading Partners program fidelity across the sub-region, as well as student support, volunteer support, liaison with district, principal, and school level

relationships. Responsible for volunteer experience and overall student performance and data management.

    a. Program Managers – Supervise a team of five to six AmeriCorps Members to guarantee program fidelity, AmeriCorps Training, volunteer training, and student diagnostics.

    b. Site Coordinators – Maintain and supervise a school-based Reading Center. Coordinate up to 100 volunteers to serve approximately 50-65 students. Liaison with schoolteachers and student support teams. They are responsible for administering Reading Partners Curriculum and managing student data at their site.

Literature Review

Artistry, Choice and Leadership: Reframing Organizations by, Boleman and Deal, has served my comprehensive review of organizational structures and strategic lenses. Fairholm, served to analyze the relationship between leadership and core values. Jurkiewicz, C., & Giacalone were used to connect the outcomes of organizational values to my reflections, Crutchfield and Mcleod were used to contextualize strategic plans. I frequently reference Reading Partners internal materials to demonstrate the effects of these strategic planning models.

Organizational Frame

According to Boleman and Deal, the structural frame "looks beyond individuals to examine the social architecture of work" (Boleman and Deal, 2013). Meaning that in creating a sophisticated and complex organization, it is essential that the architects of that organization understand that they are creating a social system. This system contains people. The people will carry norms, expectations, hopes, and anxieties. They will create a culture that is unique to this social system. The structural frame is not the only frame through which one may analyze an organization's performance, but in the case of Reading Partners, I found that it is the most appropriate. Boleman and Deal go on to discuss the dichotomy of differentiation and integration, two forces that are cooperating and conflicting in the same social space for

a given organization. For example, Reading Partners' Program Teams who are focused exclusively on student success and development; and Community Engagement Teams who are focused on the recruitment and on-boarding of community volunteers and Reading Partners outward exposure to the community.

The ideal organizational structure is contingent on what they call "structural imperatives", i.e. " size and age, core process, environment, strategy and goals, information technology, and the nature of the workforce" (Boleman and Deal, 2013).

Accordingly, Reading Partners is organized in the manner of the Divisionalized Form (Ref. table 1). In this form "The bulk of the work is done in quasi – autonomous units, as with freestanding campuses, in a multi campus university" (Boleman and Deal, 2013). In this manner Reading Partners has evolved accordingly. As an organization that has grown so rapidly (ref. Table 2) Reading Partners has developed a structure that has become increasingly complex and has built in systems to create opportunities for lateral communication and coordination across the organization.

Culture and People in Action

Boleman and Deal correctly state that "When individuals find satisfaction and meaning in work, organizations profit from the effective use of their talent and energy" (Boleman and Deal, 2013). Reading Partners is fortunate in that its mission is one that is easy for people to support and to feel satisfaction in doing their work. There are few pastimes as rewarding or as valuable as teaching a child to read their world in their own words, and to teach them to take mastery over their own schooling and education.

In my experience at Reading Partners cultural values and the symbolic frame (ref. pg. 9) have been the most evident influences on daily work and experience throughout the organization. When our former CEO introduced our core values, it was immediately reflected in the daily conversation at work. When we were restructured, and people lost their jobs, it actually hurt the people left behind at the organization. We "mourned" our colleagues! I certainly did, as I was laid off for a short period of time during this restructuring.

In the context of people management, Jukiewicz and Giacalone assert "four fundamental dimensions of what people seek in the workplace: (1) interesting work that permits them to learn, develop, and have a sense of competence and master; (2) meaningful work that provides some feeling of purpose; (3) a sense of connection and positive special relations with their coworkers; and (4) the ability to live an integrated life, so that no one's work role and other roles are not inherently in conflict. […] Organizations exhibiting spirituality as defined by the presence of these values create an environment where integration of the personal and professional selves are possible, engaging the whole person in the work process" (Jukiewicz and Giacalone, 2004). Reading Partners is able to satisfy all of these symbolic frame imperatives for most people, and certainly for all fulltime staff at Reading Partners. This implies that under the appropriate conditions, Reading Partners can be the ideal place for a person to work, provided that their symbolic needs are satisfied.

To this note, Jin and Drozdenko note "Socially responsible and ethical organizations may have better outcomes in terms of market share, profitability, or other non-financial outcome measures such as organizational commitment, organizational effectiveness, customer satisfaction, and system implementation and success. It seems that we really do have support for the hypothesis that socially responsible organizations are more likely to be successful" (Jin and Drozdenko, pg. 356). The mission at the core of Reading Partners, is essential to its success as a large, national non-profit.

The Relationship Between Strategic Thinking and Planning in Decision Models

From the outset of this paper, I attempt to respond to the prompt, "what is the best decision making model for mission-driven federated organizations"? My ultimate conclusion lies somewhere between strategic thinking, and strategic planning and implementing.

Fairholm explains strategic thinking like so "Strategic thinking is downward focused looking to ensure that meaning and purpose are diffused throughout the organization so that appropriate goals and tactics can be developed to meet the needs of the organization. Strategic planning is upward focused, to ensure that tactics link up to corporate goals and strategies" (Fairholm 2009). While he breaks down

strategic planning and implementing as "[it] Translates strategic goals and priorities into realistic and flexible plans and programs; monitors the implementation of plans to ensure that key results are achieved. Prepares, plans, budgets, and maximizes resources to address strategic issues and priorities. Establishes and implements methods for tracking progress to ensure that targets are met. Anticipates immediate and future obstacles." They go on to explain, "Technical expertise is important but to be a leader one must think in a manner that leads to a clearer vision of the whys and how's of the org to achieve wise results. (Fairholm, 2009).

They conclude "Organizational effectiveness can only be truly considered if we focus on both quantitative measures of success or actions properly linked to each other to achieve important goals AND the qualitative measures inherent in the organizations sense of values, purpose, meaning and vision. Strategic thinking and leadership takes place most importantly at the latter level and then works hard to link the organizational soul to a body that is rightly fit together by organizational managers and planners.

Reflective Practice Period: Background

I have spent the last three years, at one of the largest affiliates in Reading Partners, Silicon Valley, as a Program Manager. Over the course of these three years I have observed AmeriCorps member turnover, an expansion of influence from the national department of the organization, the formal creation and declaration of organizational values, the restructuring of program level methodologies; in the form of student assessment and all of the consequential program level changes that are implied therein. Broad changes in people management; including the turn over of year-round staff and the planned turnover of temporary AmeriCorps Service Members, as well as restructuring of leadership at executive level in the form of the majority of the Executive Team.

In order to better track the changes that have been observed, the observed effect they had and to be able to correlate with materials sourced from Reading Partners, I will explain the strategic changes and challenges in chronological order relative to Reading Partners. From this point onward, the term "fiscal

year" will refer to the ending year of an American school year. I.e. Fiscal Year 15 (FY15) will refer to August 2014 to June 2015 and so on.

FY16 Background

FY16 was the last year of Reading Partners' rapid growth phase under its founding CEO. The CEO at the time carried a classic private-sector presence in the organization's shared spaces. He often touted about his ability to name each year-round employee at Reading Partners, and where they were from. He would also celebrate his practice of responding to every email that anyone in the organization sent him.   His super-star like presence made the monumental restructuring and down-sizing that would happen later that year, all the more powerful.

FY16 was a year that began a tremendous cultural shift and precluded a complete top-down overhaul of executive leadership. Much would change, but first the culture stayed the same.

Every July, Reading Partners would host a national retreat in Berkley, California. Every non-AmeriCorps Staff Member would commute to, or be flown to, UC Berkeley where Reading Partners would reserve half the campus for a three day weekend of team bonding, free lunch, drinking, and reflective thinking. These retreats were much anticipated by veteran staff and considered to be a cornerstone to the Reading Partners experience and an essential part of the organizational culture.

Jurkiewicz and Giacalone state, "Although employees are generally insecure and frightened at work they nonetheless depend upon their workplaces for primary links to other people as well as for their social identity. Traditional support systems like places of worship, neighborhoods, and extended families are declining in importance to the individual, and time previously spent there is being supplanted by time spent at work; work is thus becoming increasingly central to employees personal growth. Consequently, individuals are seeking to merge their personal and professional values, desiring to achieve personal fulfillment through their labor." (Jurkiewicz and Giacalone pg. 2004). It seemed to me that Reading Partners was working hard to build a culture that was a unique, separated, and special experience for all the members of the organization. That we would have our own values, party habits, explicit and implicit

norms to operate under while we were together. Always wear your blue and orange (the organization's

colors).

The CEO would give presentations and speeches to a spirited crowd. We were encouraged to

wear the organizations' colors (orange and blue), to cheer, make noise, dance, and celebrate as he spoke.

It was reminiscent of rally, or of a private sector retreat. According to Boleman and Deal, "Myths,

values, and vision bring cohesiveness, clarity, and direction in the presences of confusion and mystery.

Heroes carry values and serve as powerful icons. Rituals and ceremonies provide scripts for celebrating

success and facing calamity. Metaphors, humor, and play offer escape from the tyranny of facts and

logic. Symbolic forms and activities are the basic elements of culture, accumulated over time to shape an

organization's unique identity and character" (Boleman and Deal, 2013). The CEO at this time in my

opinion, wanted to and appeared to be larger than life. He was a hero to many at the organization, and

was even called on by my Program Director on the day she quit. He was central to the founding story of

Reading Partners.

It was at one of these rallies that the CEO introduced the new organizational core values:

#TogetherWeAreBetter, #LaughterKeepsUsGoing, #VolunteersGetResults, #ReadingMatters,

#DataDriveDecisions – the organizational values campaign, presented as hash-tags, rolled out by our

national organization gave us the vocabulary to describe the internal power dynamics that shape our daily

workplace relationships and attitudes.

At this same Reading Partners Retreat, the CEO would go on to announce our new Five Year

Aspiration Statement "to close the 4th grade reading gap" - an accomplishment that has never been done

in the history of the United States and can therefore be regarded as an aspirational organizational value.

According to Jurkiewicz and Giacalone, "the data suggests that organizational cultures embodying

transcendent goals, are the most productive, and that by maximizing productivity they confer

organizational dominance in the marketplace." (Jurkiewicz and Giacalone, 2004). Meaning, that these

sort of aspirational goals are useful to an organization. Much like the mission to the moon, if we aspire

for the improbable, we just may achieve it.

I felt at that moment that closing the 4th grade reading gap was a strange aspirational goal to espouse after transitioning the national program model from one that measures individual student growth to one that measures overall student proficiency. It should be noted that in measuring student proficiency, percentile rank is typically used as a benchmarking metric to showcase program success. If percentile rank is to be used, it is logically impossible to have all students reading in the 90th, 99th, or obviously 100th percentile, rendering the measurement of the organizations' overall impact relative to the lofty aspiration of closing the fourth grade reading gap as moot. This goal was an excellent aspiration, but we decided to adopt a method that would only report out metrics that would make this goal appear to be impossible. Why?

Among the other explicit changes was the announcement of a new student assessment practice: STAR. STAR is a computer-based literacy assessment that operates completely differently from RIGBY, the assessment that Reading Partners curriculum and program implementation practices were based on. RIGBY is an assessment that is based on human observations of a student reading a collection of pre-leveled passages to a trained observer. The observer tracks student errors of different varieties and reports back both qualitative and quantitative results for analysis.

To change the student assessment is to change the very foundation of Reading Partners program and our relationship to our primary stakeholders, the students. Altering this relationship is something that directly affected the perceived values of Reading Partners by direct service personnel. Including the base of the organization, our AmeriCorps Members.

Additionally, STAR is an adaptive assessment that compares student results to their own results over time as well as to the entire national registry of scores that are available to it. With this data the assessment actually changes difficulty depending on student performance. This was described to me as an assessment that is behaves similarly to a weight lifting regimen. As a student becomes increasingly proficient in a skill, the assessment becomes increasingly difficult in order to measure their sub-domain limitations. This practice goes on to further imply that STAR measures student proficiency, i.e. their reading ability compared to the abilities of others nationwide, rather than their individual growth as a

reader over a span of time as RIGBY had. This would go on to deeply effect organizational culture, which I will explore in the FY16 Analysis.

The CEO went on to announce one last cultural push by asking a question, "What do you do with an idea?" This would be the driving statement behind the "value of the year" - "Innovation."

<center>**FY16 Analysis**</center>

Reading Partners, Silicon Valley:

According to Fairholm, strategic planning and implementing "translates strategic goals and priorities into realistic and flexible plans and programs; monitors the implementation of plans to ensure that key results are achieved." This means that leadership:

- Prepares plans and budgets and maximizes resources to address strategic issues and priorities.

- Establishes and implements methods for tracking progress to ensure targets are met.

- Anticipates immediate and future obstacles and opportunities and develops plans to address them or work around them.

- Works smart by simplifying and improving processes, emphasizing activities that add value, and eliminating inefficiencies and tasks that add little value.

- Achieve results that have a clear, positive impact. (Fairholm, 2009)

In Reading Partners Silicon Valley, leadership was inexperienced and underprepared to accommodate the catalogue of cultural and technical changes that were put in place. Turn over of year round staff has been very high for the two years preceding FY16. There were only two Program Staff who had been with the organization for more than two years. The other three Program Staff (including myself) were brand new to the organization. Unfamiliar with the rhythm of Reading Partners and unfamiliar with our support structures, The Silicon Valley was not ready to take on a dynamic year. While there were conscious efforts by National to modify programming to meet new opportunities, it seemed that affiliates were woefully under-prepared.

Consequentially, Reading Partners Silicon Valley experienced an AmeriCorps attrition rate of nearly 35%. This meant that one-third of schools were being temporarily staffed by program managers, or substitute AmeriCorps Members. Program fidelity suffered accordingly.

By the end of FY16 five AmeriCorps Members terminated their service, two program managers were laid off (including myself), one Community Engagement Manager's position was eliminated, a Development Manager was laid off, and our Executive Director left the organization mid-year. Reading Partners had suffered from a series of accounting errors at the national level compounded by the top-heavy salary demands of national. Affiliates paid the price by loosing their colleagues. Morale was at an all time low, and by the time some of the Program Managers were re-hired, and a temporary Executive Director was brought on board, the region was unstable, and the workers were distrusting of National.

I look at this moment in the Reading Partners experience as the opposite of what Fairholm describes as the "Leadership as a Values Displacement Activity." "This perspective assumes the strategic thinking involves prioritizing other people's values so they support and implement organizational goals and values" (Fairholm 2009). Meaning that, when a group is doubting an organization's core values, strong leadership can compensate, or displace, the vacuum left behind in these circumstances. It was felt by myself and others, that this was not the case.

National:

At the national level, consultants were brought in to guide our new interim CEO through the new strategic planning process. We were told that the consulting group found that National was "Top-heavy", and would need to be restructured accordingly. We were also told of accounting errors and of an unexpected deficit for the organization. We were not told exactly how or why these accounting errors occurred, but we were told that they had occurred. The previous CEO transitioned out of Reading Partners and many members of executive teams as well as national at large would follow him. National would go on to be completely restructured to be "less top heavy."

FY17 Background

FY17 was largely characterized by strategically restructuring and repositioning the organization at the national level and at the affiliate level. Concurrently the organization continued with its' innovation goals in accordance with the FY16 Strategic Plan.

A new intra-net was introduced for internal information sharing, institutional memory, creating channels for interconnection and to streamline communications called "The Library." This program was piloted and previewed by a number of affiliate region staff.

In the spirit of #TogetherWeAreBetter, the Library was largely embraced by managerial staff. It was aided by its simplicity and the fact that it behaved and operated like social media platforms that most people today are familiar with.

The innovation that was most disruptive to Reading Partners as a whole was an automated Tutor Recruitment System (heretofore TRS) that was imposed on all affiliate sub-regions by the national head of the organization. The National Community Engagement Director spearheaded the project, and they chose to resign shortly after the platform was introduced to all affiliates. The project was piloted for one month in one of the fourteen regions before being fully implemented and enforced, by National, across the organization. Because of the short pilot period, TRS was buggy, inefficient, and incomplete. The platform became a mandatory interface for all affiliate sub-regions to manage volunteer relationships.

The roll out period for TRS to affiliate regions was largely improvised by an interim Community Engagement Staff Member who had limited exposure to TRS in the pre-planning phases and had virtually no technical knowledge of the application. Consequentially there were very few technical experts throughout the organization that were able to function with TRS in spite of the system being marketed as a streamlined and user-friendly experience for preparing large groups of volunteers.

Because of the "bugginess", most affiliate regions decided to develop work-a-rounds to TRS and to report back to national that the program was a failure and would be avoided by whatever means necessary. It was routinely reported by Community Engagement Staff members at the affiliate level that

TRS was negatively impacting volunteer retention and recruitment. Many regions turned to hiring part-time tutors to compensate for the volunteer labor shortage in their regions.

Reading Partners Silicon Valley

Stability was gradually returning to Silicon Valley. At the end of the fiscal year our highest performing Program Manager was promoted to Program Director. Our new executive director and our new Development Manager started in their new positions, and we had a functioning work-a-round to TRS.

<div align="center">

FY17 Analysis

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Ultimately, the shortly piloted TRS was a monumental failure and a violation against the technical expertise and abilities of well seasoned professionals. Morale again, hit a new low and organizational growth, as measured by volunteers and student enrollment slowed.

The roll out of TRS personally devastated many of my colleagues and myself. I exclaimed on more than one occasion that I had joined Reading Partners to work in literacy intervention, not personnel logistics and management. TRS felt as if it was forcing myself and other program staff to redirect our efforts entirely to data management and volunteer recruitment. In short, TRS was not what I had signed up for.

TRS was not concurrent with the organizational values of #DataDrivesDecisons or #TogetherWeAreBetter, as the program was poorly piloted, and there were few opportunities during the pilot for affiliate level input.

TRS' complete failure formalized the sentiment among direct service personnel that National had fallen out of touch with affiliate stakeholders and the values that bind the organization in its mission. According to Boleman and Deal "Divisionalized structure offers economies of scale, resources, and responsiveness while controlling economic risks, but it creates other tensions. […] Headquarters may lose touch with operations. Divisionalized enterprises become unwieldy unless goals are measureable and reliable vertical information systems are in place" (Boleman and Deal, pg81).

A vertical information system had been put in place in the form of "The Library", but there was distrust between national and affiliates from much of the innovation in past years. TRS exemplifies an instance in which National attempted to manage a technical space that affiliate regions had custom built to suit their specific needs. TRS made these practices uniform while best-practice, according to affiliates was to leave the technical decisions to the staff member on the ground.

FY18 Background

FY18 was largely characterized by the official appointment of a new CEO, a restructuring of the National office and regional positions, the unveiling of our new strategic plan as well as a practice towards fiscal responsibility and new resource management practices across the organization.

A new strategic plan was slated to be formalized and introduced to the organization by May of 2018, near to the end of FY18. New opportunities for inter-regional best-practice exchanges were set in place, and a new system was created for Executive Directors to communicate with one another and to create new Peer-Learning-Circles.

In the FY18 Strategic Plan, Reading Partners shared a new ten year aspiration statement that read, "Reading Partners seeks to be at the center of a nationwide movement for educational equity, engaging communities to support students through trusted and proven literacy solutions" (Reading Parnters, 2018). Unlike the previous aspirational statement, this statement could be reported on. We have access to data points that can demonstrate our success in this area; we also have access to data points that will allow us to notice our failures and to be able to improve upon them. The most important part about this aspirational statement is, internal and external advisory groups made it.

The advisory groups that helped to draft the aspirational statement included a *Project Management Team*: comprised of two members of the Executive Team (CEO and interim COO), a national board member, and a regional Executive Director who met weekly throughout the planning process. *Working Group*: National office executive and leadership team members, regional leadership,

and national board members who met monthly to review progress and helped shape strategic opinions and direction

Strategy Lab Participants: Broad cross-section of regional program, development, and executive staff, and regional board members who convened in mid-November and mid-January to provide input, pressure test ideas, and weigh implications of strategic choices *Advisory Committee*: Regional board members and funding partners who met twice to review and provide input on emerging hypotheses and decisions for the strategy. (Reading Partners, 2018).

This group was fairly diverse in terms of Reading Partners Direct Service personnel. It included people from multiple echelons of the organization as well as from a broad geographic footprint. I felt that this was a sound method to produce results that would satisfy all the direct service stakeholders in the organization.

Reading Partners, Silicon Valley

This was the first year in my experience that we were able to begin a new year with all the same staff that we had ended the previous year with. "stability" was a theme that we explicitly referenced at team meetings and the consequences of that stability were palatable. At the ground level in Program Division we had developed and practiced a form of monitoring student progress that worked for our stakeholders and us. We felt empowered to make small, ground level innovations that supported our program provability, and supported our AmeriCorps Member base in a manner that allowed them to practice their jobs easily and proficiently.

By focusing on our values of #DataDrivesDecisons and #TogetherWeAreBetter, we had developed more successful communication tools and structure for our AmeriCorps Members and ourselves. For the first time in my three years we had a formal annual calendar that members could reference to predict annual program trends (i.e. Student assessment periods). We had identified our strengths as a team, and each person played their role accordingly.

FY18 Analysis

The sentiment among staff at Reading Partners feels as if it is one of trust and commitment. The people that I see still working for the organization are people that are wholly committed to the mission and values of our organization.

The new strategic plan highlights our values as an organization by focusing on our commitment to diversity, equity, and inclusion. It also focuses on increasing our impact, achieving financial stability, and ensuring organizational success. (Ref. table 3). The organization, after much dissaray has cemented itself as an institution that provides shared values and common cause around which direct service personnel can plan, innovate, and be motivated to achieve measurable goals and sustainable results.

Recommendations and Conclusion

After reflecting on my experience at Reading Partners the organization would be well served, in their next strategic planning period to, "Influence the values of the organization, not just the objectives. Strategic planning relies heavily on concepts such as mission, objective, key result areas, long and short term goals, metrics, performance measurements, action plans and tactics" (Fairholm, pg. 9). The organization would be well served to gather stakeholder input via internal surveys and focus groups to identify a set of core values that will be used to propel and be the central tenant to the next strategic planning period. The staff members at Reading Partners are highly proficient, skilled, capable and motivated people. As supported by the references above, it is up to leadership to be the values-driven moral compass of the organization, the team members that are closer to the ground level and direct service work are best suited to make technical adaptations and innovations to the daily delivery of direct service. Furthermore, it is paramount that the values that guide this organization support a technical mission that is measureable and sufficient for the needs of direct service personnel. According to Fairholm, "organizational effectiveness can only be truly considered if we focus on both quantitative measures of success or actions properly linked to each other to achieve important goals AND the qualitative measures inherent in the organizations sense of values, purpose, meaning and vision.

Strategic thinking and leadership takes place most importantly at the latter level and then works hard to link the organizational soul to a body that is rightly fit together by organizational managers and planners" (Fairholm, 2009).

 Therefore I propose that Reading Partners convene an advisory committee of direct service personnel from different divisions to compose a "wish-list" of direct service innovations that they would like to see over the course of the next strategic planning period. These innovations can be reviewed by executive teams for final approval and put into a prototype period that is of sufficient time and scope to be modified and adjusted to suit the feedback from direct service beta testers. This should serve the double purpose of alleviating the inherent conflict be in a divisionalized structure that Boleman and Deal discuss in their book.

Bolmand and Deal point out the inherent conflict in organizations, "Organizations divide work by creating a variety of specialized roles, functions and units. They must then use both vertical and horizontal procedures to lash the many elements together. There is no one best way to organize. The right structure depends on prevailing circumstances and considers an organizations goals, strategies, technology, people , and environment" (Bolman and Deal, 2013). To mean this illuminates the point that, Reading Partners is right to have a divisionalized structure as it does. In recognizing the inherent conflict that comes with creating divisions like "National", "regional", "program" etc. It is important that Reading Partners embrace the conflict and establish feedback loops to make that conflict productive and solution oriented. Quarterly engagement surveys and innovation surveys would be a wise place to start.

The most effective decision-making models for mission-driven organizations are complex and full of conflict. The best decision making models are actually strategic planning models that are based on the core values of a mission driven organization. A good leader should be an organizational philosopher who can recognize the symbolic value of statements and actions and the technical expertise of their staff. Leadership would be well served simultaneously not claim to be technical experts in regards to day-to-day operations, but to embrace chaos and uncertainty in the flow of information, and allow sub-regions to self regulate technical aspects of day-to-day work.

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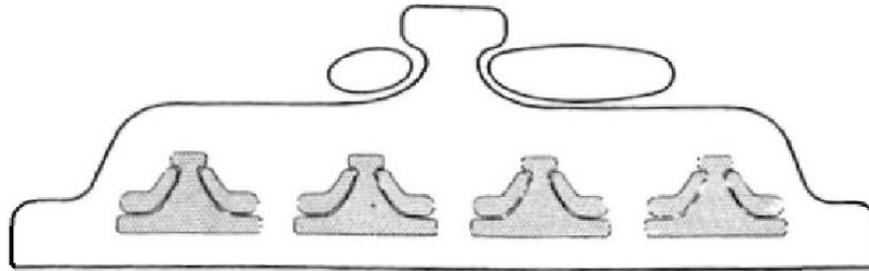
Table 1 – Divisionalized Form

Table 2 – Reading Partners Growth in Student Enrollment Since Founding

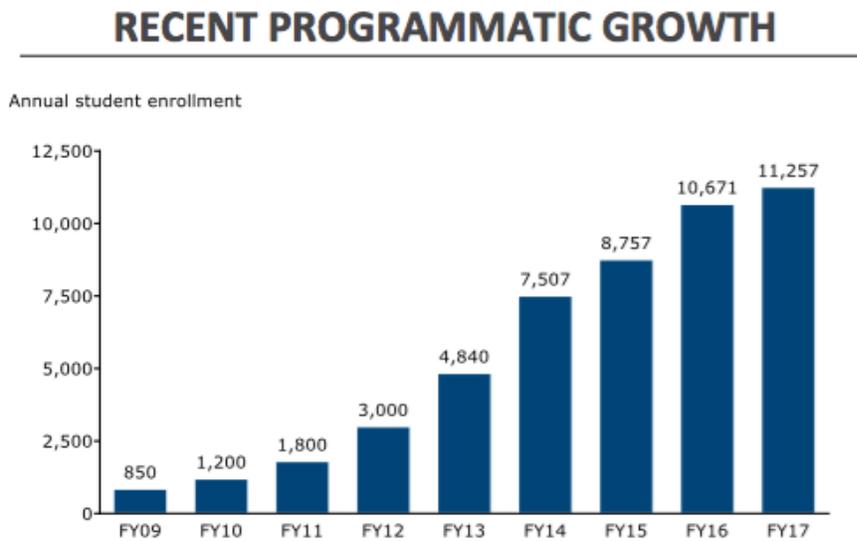## RECENT PROGRAMMATIC GROWTH

Annual student enrollment

Table 3 – FY18 Strategic Plan Values

Reading Partners will invest in four strategic priorities over the next four years

Increase impact by strengthening and enhancing Reading Partners' core program model while deepening presence in existing geographies

Deepen focus on equity by developing a team, program, and culture that reflects the diversity of the communities Reading Partners serves and supporting the broader national movement for educational equity

Achieve greater financial sustainability by increasing nationally-driven resource development and pursuing a greater proportion of multi-year, multi-region investments from a broader set of sources

Ensure organizational success by building an effective and efficient organization that has the systems, staffing, and infrastructure required to consistently deliver on the core program model

CLC Guidelines

Introduction

Provide an overview of your involvement and interest in the study and why it is important. Describe how it will impact your learning and development and potentially impact the future of the organization upon which you have chosen to focus.

Course and literature grounding

Using LMSSO course readings and frameworks as a starting point, students will add relevant current articles/literature to articulate and synthesize the main issues, findings and trends in the social sector.   These readings include The Six Practices Framework by Cruthchfield and Grant (2012) and Earthscan NGO Reader by Edwards and Fowler (2002). Current literature should represent sources such as Voluntas, Nonprofit Quarterly and Social Innovation Review.

Inquiry Methods

Students should utilize both primary inquiry methods such as interviewing, observing, conducting focus groups and surveying and secondary methods such as reviewing policy handbooks, previous planning exercises, internal employee communications, M&E reports, websites and other literature available on your chosen organization.

Organizational Background

Describe the organization, its reach, the nature of its work, its size, design, overall economic and organizational health and performance.

Organizational Analysis

Provide a comprehensive organizational analysis using The Six Practices Framework by Cruthchfield and Grant (2012) and additional frameworks and theories as appropriate.

Recommendations and Conclusion

Following the description and critical analysis, offer suggestions and recommendations to strengthen and improve the design process, the implementation and/or the impact of the strategic plan.