

EWING MARION
KAUFFMAN
FOUNDATION

**USING COMMUNITY VOICE TO INFLUENCE
PHILANTHROPIC DECISIONS:**
EWING MARION KAUFFMAN FOUNDATION
TALENT PORTFOLIO EVOLUTION 2014-2020

September 2021



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PURPOSE OF THE CASE STUDY

This case study explores the growth of a grantee portfolio over six years, 2014 to 2020. It focuses not just on the expansion of non-profits working in this space because of Ewing Marion Kauffman Foundation’s investments, but also the increased attention given to community voice in making decisions.

From its inception, listening to the community was a priority for the Kauffman Foundation talent team. In this case, “community” specifically refers to the people most impacted by the investments: students, parents, educators, and education leaders. Engaging the community before making decisions, while not a formal requirement in the organization’s grantmaking process, was an essential component of the talent team process. The program officers recognized that community voice was key to whether or not a grant should move forward.

At a quick glance, the public can decipher which organizations the Kauffman Foundation, or any foundation, supports. What is not always transparent is “the how” behind the grants. A common community question is, “How did an organization come to be supported by the Kauffman Foundation?” This case study will go behind the scenes to show how the talent team engaged community voice to make decisions. While community engagement was a priority from the beginning, there are also lessons learned about where that priority could have played a larger or different role.

As the philanthropic world explores better grantmaking strategies and more inclusive practices, this case study can demonstrate some proven strategies for making decisions. This study will also illuminate how participatory practices can help improve transparency, inclusivity, and community voice.

Education Team Overall Goal (*set in 2014*)

By 2025, double the percentage of students assessed as proficient or advanced attending a public school within the district boundaries of the Kansas City Public Schools (KCPS) including district, charter, or other models serving at least 40% FRL (Free or Reduced Lunch).

Included in the case study are measuring tools and decision-making documents. They are included as reference points, rather than suggested for best practices. The hope is that other strategic leaders can learn from the talent team in areas of success and areas of failure.

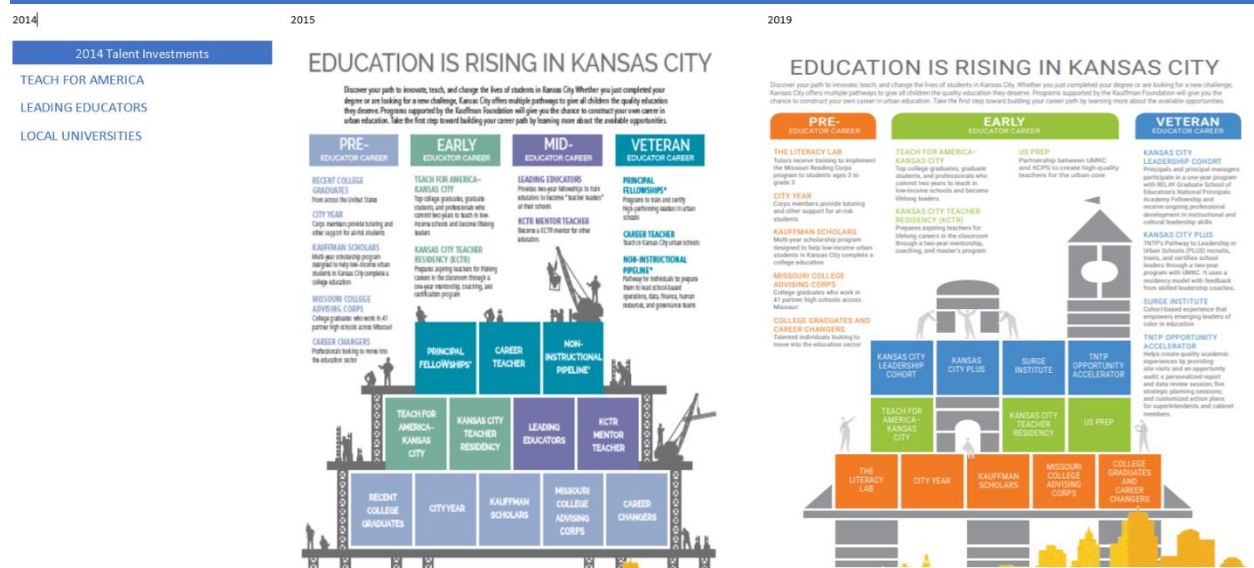
BACKGROUND

The Ewing Marion Kauffman Foundation (Kauffman Foundation) education team launched a new strategy in 2014. With that strategy, came one big goal and three main methods to reach it.

Talent, then called Human Capital, was a key investment strategy with the intent to recruit, develop, and retain educators at all levels. In 2014, the question was, “Which do you need first: an increase in the number of quality teachers or an increase in the number of quality schools hiring? It was the classic chicken and egg question. Does one build schools first and then hope to hire great teachers and leaders? Or does one build talent programs for future teachers and leaders and hope there will be good schools that can retain them?”

With most dilemmas, it is usually a both/and scenario. The talent team, Corey Scholes and Jacqueline Erickson Russell, worked closely from 2014 to 2020 to build a talent ecosystem that could support a growing and improving school system in the Kansas City region. The approach included grants, legal agreements, and events. But most importantly, the talent team used their skills to connect and convene in order to bolster the efforts of educators in the region.

Talent Portfolio Evolution: 2014-2020



Education Team Overall Goal (revised in 2017)

More Kansas City students have access to high-quality P-16 education options and opportunities.

- **More students are entering kindergarten ready to learn.**
- **More low-and-modest-income students are attending high-quality K-12 schools.**
- **More low-and-modest-income students are accessing and attaining postsecondary credentials.**
- **The education sector has the teachers and leaders necessary to staff high-quality schools.**

THE EARLY STAGES OF THE EDUCATION TALENT LANDSCAPE IN KANSAS CITY

In 2014, the education talent investments consisted of local universities, Teach For America, and Leading Educators. The talent team wanted to determine what a robust talent ecosystem could look like in the region. They conducted a landscape analysis of the education talent providers and strategies across the country. The analysis covered pre-teachers, teachers, leaders, recruitment, development, and retention. The analysis was then matched up with the needs of Kansas City.

Back then, the talent team did include community voice, but through informal conversations. These informal conversations took place with teachers, leaders, superintendents, and non-profit leaders and covered needs and priorities. The team then combined community learning, knowledge from the data analysis, and study of best practices in order to select investment and grant priorities.

In hindsight, the landscape analysis stage is the first spot where community voice could have played a larger role in developing the strategy. If this process took place with the insight the talent team has now, they would have engaged with even more representative members of the education talent community in order to get their perspective on their needs. Perhaps it would include a more formalized approach of focus groups, interviews, and community open houses. Perhaps community members would not just give opinions on the problems, but also stay on in advisory capacities to shape solutions. What is clear now is that community voice was always important to shaping the talent team's decisions. But *how* the talent team sought out insight from community members shifted throughout the tenure of the strategy, based on learning and desiring even deeper engagement with those impacted by the work.

One of the first investments the talent team made set the tone for valuing community voice in the process. It is important to note the political factors at play that influenced how the first grant was made. In 2014, the relationship between the Kauffman Foundation and Kansas City Public Schools leadership was strained. There was little to no communication between the two. Over that year, the talent team worked tirelessly to build relationships across multiple district office departments. They met for months with leaders to listen to their goals and share ideas. Eventually, the basis of trust began to form.

THE FIRST INVESTMENT: CITY YEAR

The first large investment was made with two priorities in mind: increasing attendance at the largest urban district school, and flooding the market with young, passionate people who would be ripe to become future teachers. Even the way in which the priorities were selected — after months of conversations between Corey Scholes and the Kansas City Public School (KCPS) superintendent, Steve Green — demonstrates the commitment to relationships and responsiveness that the talent team embodied.

Scholes asked if there was one area that Kauffman Foundation could support, what would it be; Green responded with attendance rates. At which point, Scholes used her local and national network to examine programs that could support Green's goal. She presented options to Green; City Year rose to the top of his interest list.

Thus began the yearlong process of stakeholder engagement to assess if City Year was the right non-profit to fill this gap in Kansas City. This process was so powerful that it influenced how the talent team approached their work moving forward.

Value of Diverse Stakeholder Engagement

The community-engaged process that Scholes led shaped the future of how the talent team would seek voice and input from educators, parents, and leaders in the community. One of the most impactful components of how this grant started was the way in which a diverse stakeholder group shepherded the process.

The first step in figuring out if City Year would work as an investment was a site visit for Kansas City leaders to see the program in action. The trip included 20 people: principals, parents from the district, the superintendent, board members, and other local funders. After seeing the program in Orlando, the Kansas City community expressed interest in moving forward. Green thought it would be wise to have a second site visit with additional school-based leaders from KCPS. Scholes planned the second site visit to Seattle which led to increased buy-in and support from local leaders.

Once the site visits were complete and the community continued to express a desire to partner with the organization, City Year rolled out their other requirements for new site launches: there needed to be 25 letters of support from civic/business leaders and four years of committed funding. If fulfilled, these requirements demonstrated a commitment from the city that City Year could sustain and thrive there beyond one single interested party such as the Kauffman Foundation. The structure of engagement ensured that people in the city saw the need that KCPS expressed and believed that City Year could help address that problem.

For the talent team, this grantmaking approach solidified the importance of diverse stakeholder investment in ideas and the value of learning together through a site visit.

Challenge: Leadership Turnover

An unexpected challenge that the Kauffman Foundation faced while making this investment was how to sustain programs through external partner leadership turnover.

Seven days after the KCPS board approved the City Year partnership, Green resigned. The leader who championed the program to the district was no longer going to be there. Under normal circumstances, this type of leadership shift could end a program partnership, especially in such early stages. However, due to the type of cultivation that Scholes created amongst civic, business, and education leaders within the district and in the region, there was enough belief in the program to maintain momentum.

The agreement with City Year withstood superintendent departure, an interim superintendent, and a new superintendent hire. When the new superintendent, Mark Bedell, started at KCPS, Scholes planned another City Year visit to immerse him in the purpose of the organization. Again, the visit was not just with Bedell, but also included one of his senior leadership team members and the City Year executive director.

That site visit was pivotal since the new KCPS leadership was evaluating all community partners and deciding which ones were no longer necessary. After the trip and because of

listening to another superintendent discuss the impact of City Year at their organization, KCPS decided to keep City Year at the district.

When people leave their roles, new internal and external relationships need to be formed. The district strategy often changes under new leadership, leaving non-profit and community partners in precarious positions. While strategic shifts are to be expected under new leadership, maintaining existing and successful impactful partnerships should also be a priority. Erickson Russell and Scholes worked to ensure that they had relationships with people at every level of district and school buildings. These relationships allowed for two-way conversations about what was working and what was not working with programs at the district. It established trust so that even if a superintendent changed, there were enough people who were still working in the space to engage in honest dialogue while trust was being built with the new leader.

THE NEXT STRAND OF THE TALENT STRATEGY: TEACHERS

While City Year started operations in Kansas City, the talent team knew there needed to be high-quality avenues for those young people to become teachers in the region. The data from 2014 regarding enrollment decline in both national and local teacher preparation programs, has since continued to slope downwards. Kansas City schools experienced open positions that went unhired due to a lack of qualified candidates, a challenge separate from the additional need of increasing the workforce diversity to better reflect the students they serve.

The exploration began with Jacqueline Erickson Russell analyzing both the current local need, local solutions, and national solutions to high-quality teacher workforce development. Erickson Russell explored eight alternative teacher preparation program options through research, exploratory interviews, site visits, and proposal review.

After review and deliberation, there were four organizations and options that Erickson Russell prioritized. The talent team settled on developing a local teacher residency program in partnership with National Center for Teacher Residencies (NCTR, then called Urban Teacher Residency United). The creation of a local organization would balance with the recent Kauffman Foundation investment in the City Year national organization opening a chapter in Kansas City. Erickson Russell also knew that the decision to create a local entity also provided opportunity for local voice to shape the vision and programming of the teacher preparation organization.

The Push to Collaborate Across Philosophical Differences

The landscape of Kansas City schools includes a mixture of district, charter, and private schools. In 2015, when the residency concept was taking form in Kansas City, there were about 15,000 students in KCPS and about 12,000 students in charter schools (all within the KCPS boundaries). The Kauffman Foundation was committed to serving children and educators in both settings.

Carrying over the value of community voice in decision-making from the City Year process, Erickson Russell ensured the teacher residency launch engaged community voice for the following areas: the decision to move forward with teacher residency program, the structure of the residency program, the partnership commitments, and the selection of residents into the program. In this case, the community did not weigh into the decision of partnering with the specific grantee, National Center for Teacher Residencies (NCTR).

Another lesson learned from the “how of grantmaking” is that the community members can play a large role in selecting the grantee to work towards the priority, problem, or opportunity. If this selection process presented itself again, Erickson Russell would have a process for community members to express preference for providers, not just voicing the problem areas that deserved attention.

When it came to community collaboration for this initiative, there were some interesting challenges. Unlike other launches that NCTR supported, Erickson Russell was committed to having a program that served both district and charter partners. This commitment also makes the approach from the Kauffman Foundation talent team unique. When this grant was made in 2015, many foundations and non-profits specialized their approach to target “only districts” or “only charter schools.” Approaches like this, while serving a purpose, increase the political divide between entities and prevent collaboration. Rather than focusing on the rhetoric of how those school entities are different, the talent team approached the work from a common-values place and focused on supporting students in all public school environments, with special attention to underserved communities.

Additionally, the talent team was committed to not just working in the high-performing school settings, but also meeting schools in the current struggles and successes that they faced. Sometimes, in addition to working with either district or charter partners, foundations and non-profits narrow their focus further to only high-performing schools. Despite the narrow focus of some non-profits, the talent team engaged potential grantees in conversations to explain the vision behind their investment strategy. Non-profits supported by the talent team would work with all types of public schools to truly serve all students in the region and not leave any school behind.

Deciding to Launch

Erickson Russell sought input from district and school leaders on whether they would be interested in a teacher residency program as a pipeline for new teachers in their schools/districts. The data was clear, the region needed more teachers. But listening to the principals and central office staff on how they saw the need was an essential factor to if the talent team would move the teacher residency program forward or not. New concepts take time to become adopted. NCTR had a framework for measuring if a region was ready for a new site residency launch.

After conversations with KCPS and local charter schools in the fall of 2014, there was interest, but not full commitments from schools. Charter schools were more ready to commit to the program than the district. In a city the size of Kansas City, both types of partners are necessary to justify building large programs like a teacher residency. The district was in the middle of a superintendent change and hesitant to partner with a program started by the Kauffman Foundation given past frustrations with the organization.

The community input gave enough approval to move forward but also demonstrated there was still work to be done to build trust with the district partners, despite the progress in communication that took place during the City Year investment.

NCTR and Erickson Russell did more listening tours and presentations which increased the number of people interested. Eventually, an overwhelming majority of school leaders expressed interest in the residency model and said that they would partner with the program. The number

of commitments gave Erickson Russell enough information to continue working on the project and pursue internal approvals to move the work forward.

Since the Kauffman Foundation was going to launch the program, but not operate it, Erickson Russell needed to provide school leaders with enough information to react to, but without designing the program from top to bottom. It required a delicate balance of vision and flexibility. The talent team knew they were going to hire a leader to run the program and it was important to develop some parameters for success but still allow the leader to design the program to meet the needs of the community.

There were many moving pieces to launching a new organization in a community. After the schools were engaged, Erickson Russell created a project plan for five categories of work: internal grant and approval process, new site development support from NCTR, hiring the executive director, philanthropic engagement, and university/state department of education partnerships. Each category had action steps and deadlines that the talent team worked on to move the project forward. There were internal benchmarks set to determine if the concept was making necessary progress.

In early 2015, Erickson Russell started the search for an executive director. The plan was for a leader to be hired at the Kauffman Foundation in order to have a one-year planning period within the safety and existing structures of the Foundation before launching the program externally as a separate 501(c)(3).

Lessons in Launching Programs

The largest lesson learned in the process of the Kauffman Foundation launching a non-profit was around launching too soon. The talent team had a plan: let the executive director work under a short-term contract position at the Kauffman Foundation and have a year of planning, meet established benchmarks, and then separate the organization from the Foundation to operate in the community.

The plan included measurable benchmarks across program, operations, and financial categories. There were project plans and check-ins; yet even still, Erickson Russell approved a launch too soon. The commitment to start the program in the community weighed heavy on Erickson Russell; districts were expecting to use this organization as a training and hiring partner. If they could not launch in June 2015, they would have to wait an entire year since the program used the summer to train teacher residents and schools needed talent before the school year started. That pressure, in addition to failing to identify missing policies and procedures, led to a rocky start for the organization.

Despite some red flags, the program exceeded its recruitment numbers for the first year and had a strong external partner list. Erickson Russell secured outside funding for the organization creating a diverse funding portfolio. There were major strengths as the organization launched. However, the missing internal policies caused strife for the organization that could have been avoided if they waited to launch.

Philanthropy plays a unique role in that it has the ability to adjust, pivot, and innovate since its most dominant accountability structures are the board of trustees and the IRS. The Foundation can, therefore, make decisions like holding a program from launching to allow for an addition

year of planning. There is a great responsibility that comes with that flexibility; one of the most important factors is community impact.

Making Decisions

There are many tools that talent team utilized to help make decisions that were aligned to the education strategy and impactful to the community.

In 2016, the Kauffman Foundation talent team was in the midst of a large expansion of the portfolio. The additional need identified was a principal pipeline. Modeling after Scholes' materials, Erickson Russell designed a strategy, decision-matrix, and landscape analysis to determine how the Kauffman Foundation should move forward in this space.¹

The tools, though simple, were guideposts for how the talent team should move forward. They gave a starting point and reference points so the team could look back and determine if the identified programs were in line with the original goals and investment intent.

Again, the decision for which program to support in Kansas City was not based solely on the talent team's opinion and analysis. After using the strategy, matrix, and landscape analysis to narrow the options, they conducted site visits. The talent team invited representative leaders from the local education sector to visit a few programs to determine if they would be good fits for the needs of Kansas City educators. Scholes and Erickson Russell wanted to ensure that the people who would be utilizing the programs saw their value and could provide input into the beginning of a project to help shape it to their needs.

One example of using the decision tools alongside a community site visit was when Erickson Russell invested in a principal pipeline. After visiting Philly PLUS, operated by TNTTP, the Kansas City group recognized that the program both met the goals of Kauffman Foundation and the education community. Thus began the journey to launch and support Kansas City PLUS.

Measuring Success

In terms of measuring success, the Kauffman Foundation formalized an evaluation team in 2015 and by 2017, they radically influenced the philosophy and techniques applied to program and grant materials. Program teams began more intentional data collection with the goal of learning what is and is not working and how to shift strategies meet talent goals.

Grantees of the talent team were very instrumental in the success of data collection. They understood the value of providing the data and how the Kauffman Foundation would use it. In most cases, the grantees were already collecting immense amounts of data. The non-profit leaders worked with the talent team to determine which data was most helpful and which lines of data best showed if the projects were on track to meeting the intended goals and purpose. By intentionally setting measurable goals together, they could check in throughout the grant term on what was working and what was not. There were measurable ways of discussing the program success, in addition to the less tangible program details.

The talent team began thinking of creative ways to use the data to tell stories about community impact. It was important to look at both the specific program data and the talent team's strategy impact overall. One year, the team created a visual to demonstrate how their investments

¹ See Artifacts 1-3 in appendix.

influenced both program participants and an extended group named “teachers indirectly impacted.”² For example, one program provided professional development for 12 school leaders; each of those school leaders coached teachers at the school using the techniques they were learning, which multiplied the program’s benefits to 465 teachers who were indirectly impacted by the program.

PILOTING PARTICIPATORY GRANTMAKING STRATEGIES

As the talent team evolved their strategy and the way in which they worked with community members, they challenged themselves to try new ways of hearing from people impacted by their work. There are formal avenues for listening (surveys, grantee meetings, community listening sessions) and informal avenues (hosted events, site visits where program officers interact with program participants, school visits).

The Kauffman Foundation talent team hosted happy hours for local leaders who participated in their programs. Part of the vision was to celebrate and honor the educators since the profession does not receive as many accolades as other professions. The other purpose was to connect educators across districts, charters, philosophies, and job titles. An educator’s role can be isolating since they spend much of their time in their own school building. Therefore, they do not have the capacity or time to build a network of professionals who can be in community with them. The talent team hosted these happy hours and then shared about new opportunities in which they were investing so educators could get involved and/or spread the word.

One fortunate byproduct of a 2018 happy hour was a piece of feedback from an attendee. She was a vice principal at a local school, and she told Erickson Russell that there were lots of great opportunities, but she saw a gap. She mentioned the need for professional development for the assistant principal role. Often vice principals already have principal certification, so they did not need to go that route, but how did they keep growing in the field?

Erickson Russell made note and brainstormed with Scholes on how to approach this gap. After researching the gap in the area and what was working across the country, Erickson Russell confirmed that this was a topic in which the talent team could invest. But she wanted to try a new grantmaking approach called participatory grantmaking.

Designing a New Path Forward

To explore participatory grantmaking, Erickson Russell wanted to lead a project where she could involve educators in the decision-making at every step of the grantmaking process. She wrote a project plan that outlined the purpose of participatory process, the timeline, the action steps, and the approach to the selection process. One way this grantmaking strategy was different from others was how Erickson Russell had the community define the need, in addition to evaluating potential solutions.

She tapped into her network to ask for representative community members and educators to participate in the process as an advisory committee. The group represented assistant principals, principals, senior-level leaders, Latinx, Black, white, female, and male participants. She led a design-thinking session to determine what the gap for assistant principals was, what type of program could serve the needs, what the criteria for success would be, and any requirements

² See Artifact 4 in the appendix.

that should exist for program participants. The meeting was to be focused on brainstorming and be inclusive of different ideas. There was one purpose and only two program parameters set from the Kauffman Foundation side. (see sidebar)

ADVISORY COMMITTEE INITIAL MEETING PURPOSE AND PARAMETERS

Purpose: Develop assistant principals in their instructional and leadership skills through collaborative and practice-based efforts

Parameters:

- Kansas City metropolitan area: Jackson, Clay, Cass, Platte, Wyandotte, Johnson
- Schools that have population of 40% or higher free or reduced lunch

The diverse group of people had different and insightful ways of viewing the gap and solution. Their ideas led to a great conversation and dialogue that Erickson Russell took back, summarized, and sent out for feedback. After receiving feedback from the group, Erickson Russell created a vendor selection one-pager, communication and marketing materials for sharing the search, and vendor selection evaluation tools (rubric and criteria).³ The advisory team reviewed these documents as well. It's worth noting that there was an

intentional decision for the senior program officer to create the materials rather than the selection team: every selection team member had a full-time job and was serving in an advisory capacity. The senior program officer had the capacity to create the materials and guide the process to incorporate the advisory team's feedback without using too much of the advisory team's free time.

After outreach and sharing of the vendor search, Erickson Russell compiled the applications and selection materials for the advisory team to review. Thirteen organizations applied and 11 of those organizations had not yet been grantees of the Kauffman Foundation. The applicant pool included both local and national vendors. The lack of familiarity was welcome and exciting since part of the purpose of doing an open vendor selection (similar to an open Request for Proposals, or RFP) was to bring in new players that the Kauffman Foundation may not yet know.

After the review, the team would meet again to discuss, debate, and compare scores. Honest discourse is an important component of making a good decision as a committee. After great discussion and submitting rubric scores, the committee selected a finalist, School Leader Lab. Erickson Russell engaged with the organization to give feedback from the selection process, highlight the rationale for prioritizing them, and align on details for how to move forward.

Thanks to the advisory committee, a new organization was working in Kansas City to solve a problem identified by the people who would directly benefit from the program.

Lessons from Participatory Grantmaking

There were two important lessons that Erickson Russell learned through this process. The first was the actual experience of working with people outside of the Kauffman Foundation in every step of the decision-making process. The design of the program and the vendor selected to

³ See Artifacts 5-6 in appendix. Selection rubric was adapted from colleague Amy Gale who led the Individual Schools Grant work.

operate the program would have been different if it had not been for the community's voice leading the charge.

The second lesson was about stakeholder engagement. While the program did a great job involving community on the design and selection, it did not generate widespread buy-in throughout the Kansas City region as it evolved. Over the last two years of operations, the program participants gave the project high impact scores and strong feedback. The recruitment and retention numbers were strong. However, when district-level leaders were asked their opinion of the program, they could not recognize the name. There was more to be done for getting supervisors, senior-level leaders, and community leaders engaged in the ongoing success and sustainability of the program in Kansas City. It was clear that the on-the-ground voice is integral to community investments and also external stakeholder engagement needs to be present throughout the process to ensure long-term viability.

POWER IN CONVENING

Typical grantmaker strategies include grants and legal agreements. As indicated from the examples above, these were key strategies for the talent team as well. However, the secret sauce for the talent team was not the funding they had available, though that is obviously important to disburse. But rather, the talent team provided value to grantees and communities through the power of convening.

Talent Grantee Roundtables

In 2017, the talent team started a practice of gathering their grantees for a quarterly roundtable. The practice evolved as the needs changed, but the goal of uniting grantees across potential competing interests to work together as a team of practitioners in the region was met.

At first Scholes envisioned the roundtable as a way to collaborate and problem solve for one specific issue - lack of communication from the largest district partner. The Kauffman Foundation and the grantees had partnerships with the district but the road to move projects, ideas, and action steps forward was not smooth. After a few quarterly gatherings where executive directors shared best practices in communication, data, and struggles with recruitment, there was a breakthrough meeting. Scholes recruited the Chief Academic Officer (CAO) of the district to attend the gathering.

That meeting changed the course of partnership with the district and freed up the quarterly gathering to take on different challenges and successes as a group. The CAO left the meeting with eyes wide open and a list of action steps. Every single grantee benefited from the CAO's ability to take the non-profits' feedback and find solutions. Often the solution involved monthly or quarterly meetings with the executive director to ensure partnerships were on track.

The original intent of the talent grantee meeting, to problem-solve working with the district, evolved. Relationships across executive directors deepened as they shared about upcoming events and collaboration ideas. Four grantees (Teach For America, City Year, Literacy Lab, and KC Teacher Residency) even co-planned joint recruiting events. In many places with many non-profits, leaders would have viewed the limited talent pool as a short supply over which they would compete, but the executive directors at these organizations partnered together as a team to work towards full cohorts for each organization.

Erickson Russell further developed the meetings from a less formal conversation to a more structured approach that allowed leaders to dive into specific topics that interested them. For example, she led meetings using the consultancy model around recruitment challenges they faced. Or she prepared time for the leaders to share best practices through presentations so they could learn from what was working across organizations. The structures changed over time, but the power of convening and connecting remained the common thread throughout the four years of meetings.

The funding the Kauffman Foundation provided these grantees was essential to their operation, but the convening that the talent team facilitated was the cherry on top to the funding. The ability to connect and convene people is a tool to further the goals and mission of the non-profits. It also ensured that in addition to the one-on-one touchpoints with grantees, the program officers could stay looped into ongoing successes and challenges that the non-profit leaders collectively faced.

AMPLIFY

One of the most powerful examples of how the opportunity to convene people can influence a strategy is through the event, AMPLIFY. AMPLIFY is an annual convening where local and national educators of color come together, learn best practices, and amplify each other's voices.

In 2016, Scholes began talking to her network about specific opportunities for teachers of color. How could this improve? What is happening in this space nationally? Locally?

After many conversations with funders, educators, and non-profit leaders, Scholes set on a goal to amplify the voices of teachers and leaders of color by creating a network that was unique for them. She decided to plan a conference and limit the attendance to those who identified as people of color. The purpose was to help Kansas City educators of color build a network that was both local and national. Sometimes, a person could be the only teacher of color at their school. Building a network would allow them to have a community of practice outside of their school.

There was an obvious concern of being white and planning a conference for people of color. So, Scholes created a planning committee of practicing educators of color. There were district and charter, teacher and principal representatives on the committee. Since they had their own full-time jobs, she structured the committee to play a distinct role: idea generation. Committee members gave ideas on the types of sessions, specific speakers, elements for conference structure, audience engagement tools, outreach, and marketing ideas. They did not do logistics, speaker requests, contracts, or execution. Those tasks were left to Scholes and other key Kauffman Foundation associates such as Tonya Guinn, Precious Washington, and Miles Sandler who all sit on both the AMPLIFY committee and on the education team. As the years passed and the conference became more established in the fabric of the community, committee members assumed more ownership of the content because they wanted to take on more of the work. The community they created was so important that they were passionate about devoting their free time to the effort of sustaining and growing AMPLIFY.

With the goal to build both a national and local network, the committee allowed attendees from the Kansas City region, but speakers could be from all over. This led to the most important lesson from the first year: highlight more local leaders as speakers/experts. Participants gave feedback that they loved the conference but would like to see local leaders featured as

speakers. In future years, the AMPLIFY planning committee developed a process specifically for local leaders to present topics, which led to a balance between local and national speakers.

AMPLIFY was also an important investment for the Kauffman Foundation because of the unique need it met in serving people of color. While all of the talent investments and grants were aimed to diversify the educator workforce and operate within schools that served primarily students of color, the AMPLIFY event was the first investment that exclusively gave people of color their own space.

EVOLUTION OF TALENT WORK

Over six years, the talent team created a robust pipeline for people to enter the field of education and to remain in the profession. The strategy involved grants, agreements, and convening to support educators at all levels and at all points in their career pathways.

Throughout the portfolio's existence, the talent team prioritized listening to the community of educators who would be impacted by the grantmaking strategies. They piloted new processes and systems to include community voice in decision-making, knowing that the impact of the work would be greater when the end user is prioritized throughout the whole process.

As expected, some of the work they started phased out and some will continue beyond the six-year investment period. But what will remain central to the body of work is that the input of the students and educators were kept at the heart of the work. And what will live beyond the time of the work is the importance of valuing the voice of community in making decisions about how to invest the Foundation's money.

APPENDIX

Artifact #1

LEADERSHIP STRATEGY DOCUMENT

Leadership Strategy

Vision:

To increase the recruitment and growth of leaders with adequate skills who can provide high-quality education, Kansas City needs to support a bench of current leaders and to develop future leaders.

Strategy:

In order to support a bench of current leaders, the Kauffman Foundation needs to:

- Conduct landscape analysis of current need in Kansas City
- Engage local stakeholders in conversations about current state, future state, and ideal state of leadership in schools
- Investigate best practices and high-quality programs across the country
- Create a matrix for choosing leadership development programs
- Develop a process to provide Kansas City community access to leadership development programs
- Evaluate the leadership development programs
- Create collaboration opportunities for leaders participating in the programs and leaders throughout the city

In order to develop future leaders, the Kauffman Foundation needs to:

- Conduct landscape analysis of current need in Kansas City
- Engage local stakeholders in conversations about current state, future state, and ideal state of leadership in schools
- Investigate best practices and high-quality programs across the country
- Create a matrix for choosing leadership pipeline programs
- Develop a process to provide Kansas City community access to leadership pipeline programs
- Evaluate the leadership pipeline programs
- Create collaboration opportunities for leaders participating in the programs and leaders throughout the city

Artifact #2

LEADER PIPELINE MATRIX

Selection of Leader Pipelines

	MEET OR EXCEEDS EXPECTATIONS	BELOW EXPECTATIONS
CONNECTION TO EDUCATION GOAL	<p>Increase the percentage of students in Kansas City reaching Academic life outcomes that prepare them for postsecondary success.</p> <p>Build a pipeline the trains and certifies high-quality principals in Kansas City urban schools and allow the creation of 15-20 new, turnaround or replicated schools.</p>	<p>Build a pipeline that trains, but does not certify high-quality leaders in schools across the KCMO school district.</p> <p>Or</p> <p>Build a pipeline that trains and certifies high-quality leaders in schools across the KC metro area, but not KCMO school district.</p>
LEADER OUTPUT (PER COHORT)	<p>Initial Year: 2-5 Leaders Proceeding Years: 15-25 Leaders</p>	<p>Initial Year: less than 2 leaders Proceeding Years: below 25 leaders</p>
SCHOOL PARTNERS	<p>Partnership with both charter and KCMO district schools</p>	<p>Partnership with 5-7 charters</p> <p>Or</p> <p>Partnership with EMKS and KC metro school district</p>
HIGHER EDUCATION PARTNERS	<p>Certification and master’s degree upon completion of the program</p>	<p>Certification, but no master’s upon completion of the program</p> <p>Or</p> <p>No certification upon completion of the program</p>
FLEXIBILITY IN DESIGN	<p>Program can be designed to meet KC specific needs</p>	

PROFESSIONAL DEVELOPMENT

Urban-specific leader training

Practice-based training coupled with theory

Internship/Residency model

Master's program based on competency and evaluation

Leader training is not urban-specific

Theory-based training

No master's degree awarded or master's degree awarded without competency-based assessment (ex. Student achievement data)

Artifact #3

LEADER PIPELINE LANDSCAPE ANALYSIS

Program identifying information is removed

PROGRAM	DESCRIPTION	YIELD	COST	PROS	CONS
PROGRAM A	Residency program working with a high-performing leader. Residents receive on-going coaching from program staff and training sessions. Placed principals receive 1-2 years of early career support.	12	Year 1: \$660,000-780,000 (12 fellows) Year 2: \$1,000,000-1,300,000 (12 fellows + second year members)	High-bar for entry Practice-based program	National recruits may not want to come to KC KC would need to merge or develop partnership between Leading educators and program "XYZ" program.
PROGRAM B	Principal fellowship that prepares aspiring school leaders through a three-year program. Year 1 is a paid fellowship in a high-achieving urban school. Year 2 and year 3 are customized support to ensure your first years as a principal are successful.	3 year commitment for 3 fellows every year: 9 fellows	Year 1: \$690,000 (includes salary)	Customized support	High- cost, low-yield Only work with charters

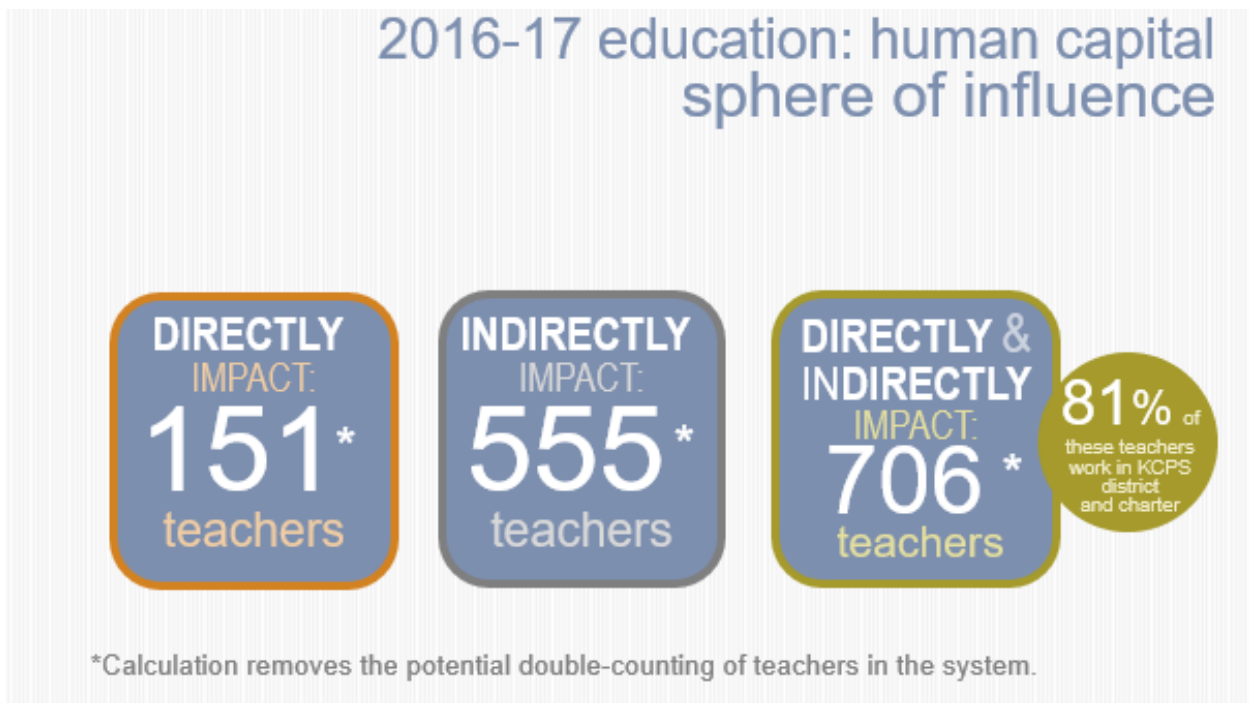
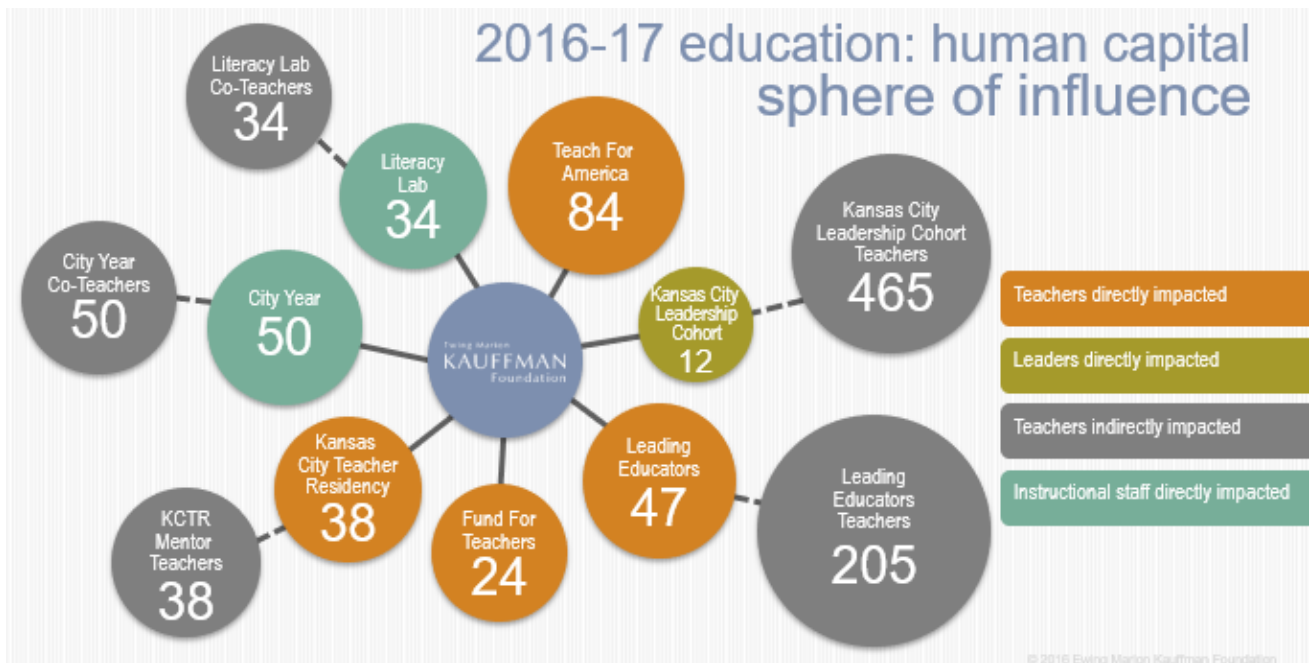
PROGRAM C	Principal training program that offers a master's degree from XYZ University. The program uses theoretical knowledge, problem-based coursework, and field-based experience. The courses are over two consecutive summers and internships happen at their site of employment in their home city.	No requirement	\$60,000 per candidate 12 leaders: \$720,000	The summer format allows principals-in-training to remain at their school and still earn a salary. Graduates earn their degree in 14 months. This schedule allows dedicated educators who cannot afford to leave their schools attend a full-time program.	There are concerns over the lack of oversight from program to the fellow. There is a lot of autonomy and may not be enough structure to ensure candidates are ready to enter leadership.
PROGRAM D	Full-time, one-year master's program and residency for educators to become school leaders. Students in both strands of the program participate in a year-long internship in schools in the XYZ region. Alongside a mentor, they develop instructional leadership skills, operations skills, and data analysis. After completion of the program, the graduate commits	No requirement	Tuition: \$45,008 per candidate Student Budget: \$72,576	Aspiring leaders would learn in high-quality schools	Leaders would need to leave KC, which would reduce the pool of candidates working in our city.

three years to the region.

PROGRAM E	Two-year program that certifies and trains aspiring leaders. It includes job-embedded practice with a mentor principal, personalized coaching, and a cohort training model.	12-20 (same cost)	Startup: \$300,000 Remainder of year: \$600,000 Year 2: \$974,847	Job-embedded Builds bench of leaders Program supports and coaches principal managers and senior-level talent alongside principals. Works in both district and charter schools	Program needs to be approved as certifying agency in state of Missouri
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Artifact #4

HUMAN CAPITAL SPHERE OF INFLUENCE GRAPHIC



Artifact #5

VENDOR SELECTION ONE-PAGER

Vendor Selection: Assistant Principal Collective

Purpose: Develop assistant principals in their instructional and leadership skills through collaborative and practice-based efforts.



Context

The Ewing Marion Kauffman Foundation supports a variety of recruitment, development, and retention efforts for teachers and leaders in the Kansas City region. There is a growing need to provide professional development and community to instructional coaches and assistant principals.

There are already local supports in place for instructional coaches and assistant principals seeking principal certification. This search is for a provider to support assistant principals in their instructional and leadership skills through collaborative and practice-based efforts.

If assistant principals are supported and well-equipped, our students are, too."

– Susana Elizarraraz,
Sixth Grade Teacher at Gladstone Elementary, Kansas City Public Schools

"The assistant principal position plays a critical role in student success and school improvement. They shape the quality of instruction, the development of teachers, and the overall culture of the school. There is tremendous potential for a positive return on that investment."

– Jayson Strickland,
Superintendent of
Hogan Preparatory Academy

Engagement components

As part of the project, we expect the selected vendor to deliver multiple services. The items below are ideas and questions cultivated from a cross-sectional group of Kansas City educational leaders. The ideas are not mandatory, but rather suggested.

Topics to cover	<p>What areas of focus will you select for the program? There are many topics you can incorporate into the collective. Please also consider:</p> <ul style="list-style-type: none">• Defining success as an assistant principal• Evaluating discipline practices and adapting based on current research• Operating within systems/distributive leadership• Talent development
Format	<p>How will you structure the collective? When will it take place? There are many formats and structures you can incorporate into the collective. Please also consider:</p> <ul style="list-style-type: none">• Cohort model• Local site visits/non-local site visit• Facilitated dialogues• Case studies• Problems of practice <p>Time commitment for participants should not exceed 10 hours a month with no more than 5 hours a month before 5:00 p.m. on workdays.</p>
Stakeholder engagement	<p>How will you engage the school leadership and district leadership in the process to ensure alignment with the assistant principal learning?</p> <p>How will you share information about the collective and recruit participants? There needs to be a minimum of 15 leaders in order to move forward.</p>

Vendor Selection: Assistant Principal Collective

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End results

How will you measure success and the development of the educators in the collective?

What will participants receive because of their involvement?
(ex. microcredential, swag, public recognition, etc.)

Timeline and funding

We are planning for a one-year engagement for the 2019-20 school year. There is potential to reengage depending on satisfaction and engagement levels, as well as results.

Proposal contents

If you are interested in applying, please submit a short proposal (8 pages or less, excluding appendices) detailing:

1. Your approach to addressing the components above;
2. Detail on your organization's experience in working with similar entities and/or on similar projects in the past; and
3. A proposed budget and supporting documentation that clearly describe how the budget amounts are calculated.
4. Initial draft of timeline, action steps, and outcomes.

Completed concept papers should be submitted to Jacqueline Erickson Russell, Senior Program Officer, at jericksonrussell@kauffman.org no later than August 9, 2019.

Artifact #6

VENDOR SELECTION RUBRIC

	A	B	C	D	E
1	Assistant Principal Collective: Vendor Selection Rubric				
2					
3	Organization Name				
4					
5					
6	Scale: 1= Very Poor 2= Poor 3= Average 4= Good 5= Excellent				
7	Application Review	Criteria	Points	Comments	
8	Education Experience	Does the organization have experience working with education initiatives (work with assistant principals is excellent, but not mandatory)?	<i>Use dropdown</i>		
9	Facilitation Experience	Does the organization have experience facilitating cohorts?	<i>Use dropdown</i>		
10	Ambitious and Realistic Outcomes	Does the proposal establish ambitious and realistic outcomes for the projected timeframe?	<i>Use dropdown</i>		
11	Implementation (x2)	Does the proposal sufficiently outline steps to achieving project goals (i.e. timeline, action steps, goals, approach)?	<i>Use dropdown</i>		
12	Stakeholder Engagement	Does the proposal outline an engagement plan that addresses investment and marketing efforts?	<i>Use dropdown</i>		
13	Innovation	Does the organization identify new ideas or innovative approaches in reaching the target outcomes?	<i>Use dropdown</i>		
14	Results	Does the organization include measurable objectives that align with the need and plan?	<i>Use dropdown</i>		
15	Budget	Is the project budget commensurate with the work outlined in the proposal?	<i>Use dropdown</i>		
16	Total Points		0		
17	Do you recommend this organization?		<i>Use dropdown</i>		
18	Additional Comments				
19					
20					
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