CULTIVATING SYSTEMS LEADERSHIP IN CROSS-SECTOR PARTNERSHIPS:

Lessons from the Linked Learning Regional Hubs of Excellence

AUGUST 2017

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EQUAL MEASURE

FINDING PROMISE

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Linked Learning Regional Hubs of Excellence Initiative Partners

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About Jobs for the Future

Jobs for the Future (JFF) is a national nonprofit that builds educational and economic opportunity for underserved populations in the United States. JFF develops innovative programs and public policies that increase college readiness and career success and build a more highly skilled, competitive workforce. With over 30 years of experience, JFF is a recognized national leader in bridging education and work to increase economic mobility and strengthen our economy. For more information, visit www.jff.org.

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About Equal Measure

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About this Issue Brief

Investments in the social sector have become increasingly complex, with many foundations shifting from supports for single organizations toward more systemic strategies focused on improving outcomes for entire communities. As a result, the field has become awash in regional, or place-based, investments that rely on cross-sector partnerships and networks to drive change. These efforts require coordination among stakeholders across all levels of the practice and policy continuum – from direct service providers, to nonprofit intermediaries, funders, advocacy organizations, and policymakers.

It is in this context, and in the spirit of continuous learning, that The James Irvine Foundation's Linked Learning Regional Hubs of Excellence (Hubs) investment serves as a systems change experiment, offering insights and critical lessons that can inform others undertaking similar work. The aim of this Issue Brief is to contribute to field dialogue and learning about the role of leadership in complex systems change strategies, particularly those focused on producing equitable impacts in college and career readiness. *This Brief is intended for a variety of audiences – including stakeholders leading or participating in systems change efforts, funders, intermediaries, and/or technical assistance providers, as well as those evaluating or researching how complex change strategies evolve.*

Following a quick overview of the Foundation's investment, we explore the following questions:

- What is systems leadership, and why is it important for advancing complex, place-based, multi-stakeholder change efforts?

- What are the characteristics of effective systems leaders, and how can they be cultivated?

- How has systems leadership shown up in the Hubs investment?

- What are the implications of this initiative for others leading or participating in systems change efforts?

In the first two sections of this Brief, we draw heavily from an extensive literature review (Appendix A). We expand on the available scholarship by incorporating the lived experiences of Linked Learning Regional Hub grantees and their partners; perspectives from the initiative's funder, technical assistance partner, and evaluation team; and interviews with key informants outside the initiative (Appendix B). Where possible, we use anonymous illustrative quotes from our interviewees to draw their voices directly into this publication.

About the Linked Learning Regional Hubs of Excellence

By 2025, the State of California projects a demand for one million additional career-ready college graduates to meet the needs of employers and drive the state's economy. This skills gap threatens to contribute to the cycle of poverty for underprepared, low-income students, as well as slow economic growth in some of the most impoverished areas of California.

Linked Learning is a proven and widely supported approach to college and career readiness that has expanded to numerous school districts across California (Figure 1). But to accelerate the growth of Linked Learning strategies and their impact, local institutions have been called upon to collaborate and develop systems that connect efforts across sectors in the region.

Figure 1   **LINKED LEARNING REGIONAL HUBS OF EXCELLENCE SITES**

CALIFORNIA

EAST BAY

TULARE-KINGS

LONG BEACH

SAN BERNARDINO

The Linked Learning Regional Hubs of Excellence is an initiative of The James Irvine Foundation to bring together K-12 school districts, postsecondary institutions, workforce intermediaries, employers, and community-based organizations to implement a coordinated Linked Learning strategy (Figure 2). The investment aligns with the Foundation's goal to increase the number of low-income young people who complete high school on time and earn a postsecondary credential by age 25. A diverse group of four sites became Hubs, each led by an anchor:

- **East Bay**
  Led by the Oakland Metropolitan Chamber of Commerce

- **ALL IN/Long Beach**
  Led by the Long Beach College Promise (Long Beach Unified School District; Long Beach City College; California State University, Long Beach; and the City of Long Beach)

- **San Bernardino**
  Led by a consortium (San Bernardino County Superintendent of Schools' Alliance for Education; California State University, San Bernardino; and the Inland Empire Economic Partnership)

- **Tulare-Kings**
  Led by INNOVATE Tulare-Kings and Tulare-Kings Linked Learning Consortium

Figure 2   **LINKED LEARNING REGIONAL HUBS OF EXCELLENCE ECOSYSTEM**
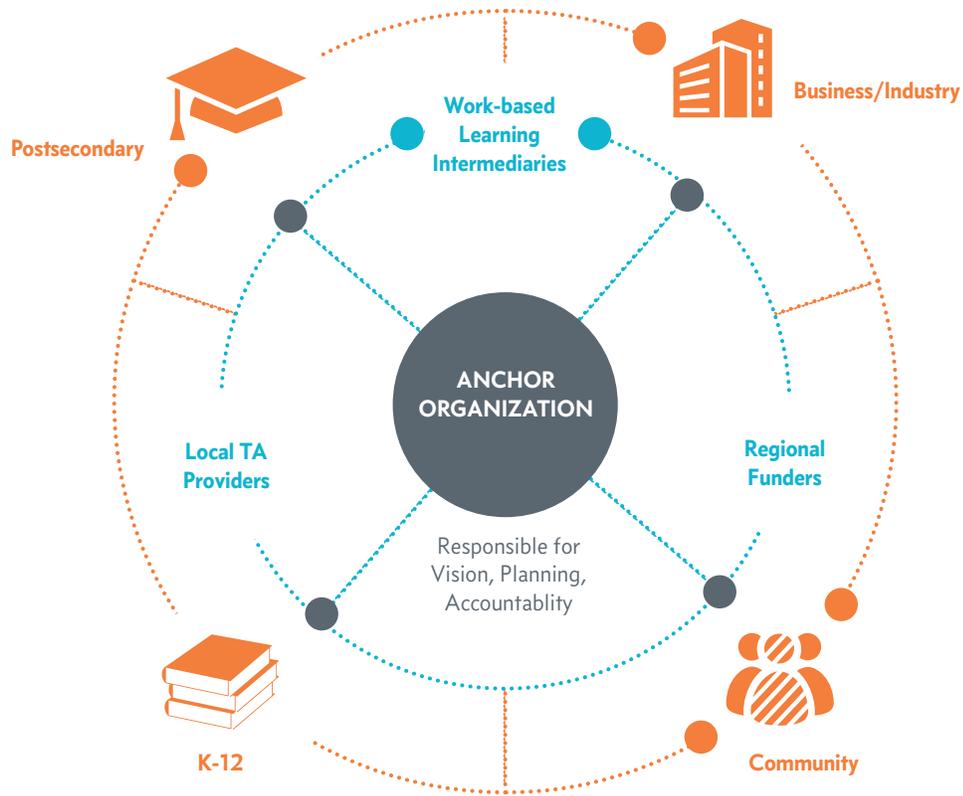
The initiative tests the efficacy and viability of a regional model to accelerate the demand for and number of graduates from pathways that blend high school, college, and career (see Framework, Appendix C). Anchor organizations manage a cross-sector effort designed to promote the following strategies:

» Increase the number of Linked Learning pathways by scaling pathways within schools, to more schools, and to more districts in the region

» Improve the quality of Linked Learning opportunities within available pathways

» Align pathways across secondary, postsecondary, and workforce systems, to support more seamless youth transitions

» Adapt Linked Learning core components to postsecondary and workforce contexts

An important element of the Hubs approach is the ability to organize, mobilize, and support the function of a large, regional network of Linked Learning stakeholders. To do so well requires attributes we categorize as *characteristics of systems leadership*.

THE LINKED LEARNING APPROACH

Linked Learning is an approach for transforming high schools to prepare all students for college, career, and life. It consists of the following core components to help students advance their education and career success:

- **Rigorous Academics:** Rigorous academics prepare students for admission and success in California's community colleges and universities – as well as in apprenticeships and other postsecondary programs.

- **Career and Technical Education (CTE):** CTE in the classroom delivers a sequence of courses, emphasizing real-world applications and academic learning.

- **Work-Based Learning (WBL):** WBL exposes students to real-world workplaces via job shadowing, apprenticeships, internships, and more – and teaches the professional skills needed to thrive in a career.

- **Comprehensive Support Services:** Comprehensive support services include counseling and supplemental instruction in reading, writing, and mathematics to address the individual needs of all students, ensuring equity of access, opportunity, and success.

SYSTEMS LEADERSHIP: DEFINITION AND RELEVANCE

What is systems leadership, and why is it important for advancing complex, place-based, multi-institution change efforts?

In this Issue Brief, "systems leadership" primarily refers to leadership intended to bring about systems change, but may also refer to leadership of a particular system. Beginning in the late 1980s, organizational learning scholars began to emphasize the importance of systems thinking as a discipline that individuals and organizations can use to bring about change and achieve goals. Building on this concept, more recent work has emphasized the critical role systems leaders must play in increasingly complex and interconnected environments. Writing on the topic of systems leadership is relatively new, and available scholarship overlaps with concurrent thinking in areas such as collective leadership, facilitative leadership, network entrepreneurship, and network leadership.

Leadership is one of the most broadly studied topics in the field of social and community change, and scholarship in this area has evolved to encompass many theories of – and approaches for cultivating – leadership.[1]

One important distinction between systems leaders and organizational leaders is in the suite of influence, incentives, and levels of accountability the leader can access. Whereas organizational leaders often have authority to set direction and make decisions, and are ultimately accountable for organizational performance, systems leaders rarely have direct authority over the systems or networks of stakeholders they are working to influence. As such, systems leaders must often exercise a wide range of dispositions, skills, and ways of working that help advance cross-sector, network, or partnership-based strategies.

Systems leadership is among the foremost challenges and opportunities of the Linked Learning Regional Hubs of Excellence initiative. To achieve the goals of the initiative, individuals within Hubs must lead systems change efforts across the K-12, postsecondary, and workforce sectors, and in coordination with other critical regional partners – including employers, community-based providers, advocates, health and social agencies, and policymakers.

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[1] The concepts of transformative leadership (e.g., Bass, 1990), adaptive leadership (e.g., Heifetz, 1994), and distributed leadership (e.g., Spillane et al., 2001) are examples of leadership theories that have received significant attention in the social sector. While this Issue Brief focuses on systems leadership, the evaluation team acknowledges that scholarship on other topics in this domain is valuable.

What are the characteristics of effective systems leaders, and how can they be cultivated?

While labels and definitions related to systems leadership will continue to evolve, the themes we identify strive to unify current thinking on the topic.

Through a review of the literature and our work on this initiative, the evaluation team identified *nine characteristics of effective systems leaders*. We present these in Figure 3, categorized as dispositions, skills, and ways of working.[2]

Figure 3 **NINE CHARACTERISTICS OF EFFECTIVE SYSTEMS LEADERS**

WAYS OF WORKING

SKILLS

DISPOSITIONS

Create opportunities for individuals at multiple levels of the system to see benefits of their participation in the short and long terms.

Understand nuance, while maintaining the "big picture" and seeing the dynamics inherent within complex systems.

Establish ways to promote the collective as the unit of influence (rather than the individual) and the inclusion of all system actors.

Embrace learning, ambiguity, risk, and experimentation.

Incentives and Payoffs

Systems Thinking

Empowerment

Open Mindset

Co-creation of Structures to Support the Work

Unwavering Attention to DEI

Work collaboratively with partners and stakeholders to develop processes and structures that facilitate joint work.

Actively apply diversity, equity, and inclusion as a lens during the systems change effort.

A Focus on Results

Relationships and Trust

Effective Communication

Help others stay focused on results, especially changes that will improve programs, services, and outcomes for intended beneficiaries.

Support productive working relationships and shared trust among multiple stakeholders in the system.

Hear points of view that may be different from their own and craft resonant narratives.

[2] See Appendix D for additional information about relevant attributes and skills.

SYSTEMS THINKING

Systems leaders understand nuance, while maintaining the "big picture" and seeing the dynamics inherent within complex systems.

Systems thinking is about stepping back and seeing the whole picture. Only from this "balcony view," and with full "organizational awareness," can leaders detect patterns and interrelationships to leverage or disrupt. This skill links to adaptive leadership, which rests on the notion that to be influential, leaders must constantly assess what is happening in the system, and learn, innovate, and test solutions. Adaptive leaders are averse to the status quo and are unafraid of imposing change on others. As one key informant commented, it can be hard to balance the big picture with the details needed to do this work well: *"[It's] being visionary, but also being able to get into the weeds, as needed...It's hard to find leaders that do both very well, but you have to have some comfort [working] at both levels."* Regional hub anchors of the Linked Learning initiative convene cross-sector partners and coordinate joint activities. This points to a network weaving role that relies on an ability to think systemically.

OPEN MINDSET

Systems leaders embrace learning, ambiguity, risk, and experimentation.

Systems change work is characteristically risky, innovative, and developmental. Those who lead systems change efforts demonstrate audacity to disrupt the status quo for the sake of making programs and services more effective and true to their purpose. They will let go of pre-set goals and agendas and identify what is critically needed and possible, setting aside original strategies when unexpected paths and opportunities emerge. Considering the variety of barriers to identify and address, an open mindset is important.

Hub leaders noted the difficulty of this work, and the need to normalize it with regional partners. One observed, *"You need to create a culture where it's okay that it's hard."*

UNWAVERING ATTENTION TO DEI

Systems leaders use diversity, equity, and inclusion (DEI) as a lens during the work.

Applying a DEI lens means that systems leaders must be adept at creating constructive discomfort and tension around inequity to galvanize people to act. They have a deep passion for and commitment to social justice, continuously bringing to the fore inequities embedded in the systems they want to change.

> *"You've got to create enough tension that people are actually going to change something."*

As one leader noted, *"You've got to create enough tension that people are actually going to change something...Until people are so uncomfortable that they're actually going to do something about it."* Getting people to increase their awareness and willingness to work through the realities of racism and exclusion in our systems requires this degree of constructive discomfort. Through establishing shared-power settings, leaders can create safe spaces for deep thinking, discussion of difficult structural and system challenges, intergroup dialogue, and balanced participation of diverse stakeholders.

RELATIONSHIPS AND TRUST

Systems leaders create productive working relationships and shared trust among multiple stakeholders.

This is the strongest theme from the literature and interviews. Leadership is relational, and relationships and trust help build the foundation for growth and change. *"Change moves at the speed of trust,"* one key informant commented. Systems leaders who are in it for the long haul have patience for trust and the time it takes to see progress toward shared goals. Empathy is a critical emotional intelligence competency for building relationships and trust, and involves sensing others' emotions, understanding their perspectives, and taking an active interest in their concerns.

EFFECTIVE COMMUNICATION

Systems leaders hear points of view that may be different from their own and craft resonant narratives.

Systems leaders are skilled at bridging divisions to show where common interests lie. They can adeptly facilitate conversations that explore different ideologies and help others hear points of view that are distinct from their own. They must speak the languages of multiple sectors – at times requiring one to become *"bi-lingual [or] tri-lingual in terms of operating in these different spheres to create the levels of trust needed to work together,"* one leader stated. Flexing the narrative for different audiences – e.g., shifting the degree of ambiguity, tweaking language, factoring in varied concerns – is a necessary tactic to galvanize system actors toward the vision.

The ability to translate goals and strategy to postsecondary and workforce partners, who may be new to "Linked Learning," is a developmental skill for leaders of the Hubs. Communication has frequently risen to the top of conversations among initiative partners and grantees alike, reinforcing it as an important capability of systems leaders.

A FOCUS ON RESULTS

Systems leaders help others stay focused on results.

One way to ensure that the collective "north star" remains at the center is to organize collaborative activities around results, rather than around sector or program area, which can have the perverse effect of reifying the very silos systems leaders are trying to break down. As one key informant observed, *"To lead these types of collaborative and complex efforts, you need to focus on outcomes and results first and foremost, not just trying to map what already exists."*

> *"Change moves at the speed of trust."*

Then partners can tackle questions like, "What are the key drivers? What are the key influencers of that outcome?" to align activities with desired outcomes. At the outset, in collaboration with partners and stakeholders, leaders should agree on what success looks like, and create a plan for shared measurement of common goals. A focus on results and "early wins" constitute key sticking points for the Hub grantees.

CO-CREATION OF STRUCTURES TO SUPPORT THE WORK

Systems leaders collaborate with partners and stakeholders to develop processes and structures that facilitate joint work.

Systems change requires partners to work together in new ways. While organizations may have their own approaches to fulfilling their obligations, co-creation of joint processes should be an inclusive effort. These processes should allow rich idea exchange among representatives of all organizations and communities touched by the change process – including those directly affected by the initiative. An accountability structure that clarifies and codifies partners' commitments to their collective work complements a focus on results. Data-sharing agreements, group decision-making, and nimble governance structures are among other aspects of infrastructure. As one key informant noted, the ability to manage processes is paramount in *"structuring group engagement to keep people at the table feeling like their voices are being heard."*

EMPOWERMENT

Systems leaders promote the collective as the unit of influence, rather than the individual.

"A heroic leader is the enemy of systems change," commented a key informant. Inspirational leadership has value, but it lacks capacity to solve enduring systemic issues. Systems leadership recognizes that there are actors at multiple levels that need to lead change in their respective systems. When leadership and power are distributed, capacity increases, and single leaders' roles diminish. Sharing power and abandoning "I for we" is a necessary stance to practice systems leadership.

INCENTIVES AND PAYOFFS

Systems leaders create opportunities for individuals at multiple levels of the system to see benefits of their participation in the short and long terms.

Doing this type of work well requires *"Appreciat[ing] where perspectives are coming from, and the various payoffs for different actors, so that you can actually create some joint payoffs around working together in a durable way,"* according to one Hubs grantee. Systems leaders need to help partners understand and articulate the benefits of participation, such as

> *"A heroic leader is the enemy of systems change."*

stretching their resources further to accomplish more. A sense of urgency in the system, due to a crisis or impending crisis, can galvanize individuals to join a collaborative effort that leaders insist will alleviate the problem. However, systems change takes time, and therefore systems leaders must help partners see interim progress that is directly beneficial to them. Otherwise, the initial momentum will not sustain, and the collaborative effort will falter. Systems leaders must continuously refresh the individual partner value proposition to keep stakeholders involved.

CULTIVATING SYSTEMS LEADERS

How do you build leadership skills?

While there has been increased attention to the concept of leadership in complex systems change, there has been less written about how funders and intermediaries can best support development of those leadership skills. The Linked Learning Regional Hubs of Excellence offered the opportunity to test multiple approaches to systems leadership development. This investment has benefited from the support and coaching of Jobs for the Future, the intermediary and technical assistance provider for the four Hubs grantees. From the launch of the initiative, JFF took a strong position on the role systems leadership would play in the success of this investment. JFF has applied a multi-layered leadership development strategy: Hub leaders receive one-on-one coaching from JFF, convene regularly with other grantees and their partners as a learning community, and attend conferences focused on policy and practice. The learning community promotes the formation of informal mentoring relationships across sites.

Leadership development is a life-long journey. Reflecting on one's own thinking and experiences supports learning and self-improvement. In addition, systems thinking and leadership theories provide mental maps for systems change work and the leadership qualities conducive to success in complex contexts. The value of this scholarship is in helping to reframe, reflect on, and better understand what is being experienced to continuously advance the systemic shifts and social outcomes toward which leaders strive.

We synthesize research on two categories of systems leadership development – individual development and collective development strategies.

Individual Development Strategies

There are three main types of individual development strategies: *coaching, mentoring,* and *experiential learning.*

Coaching

Effective coaching helps individuals reflect on and expand their thinking about the relationship between their actions and the results they see. Coaches help emerging leaders adjust their behaviors to become more productive and achieve desired goals. The expertise coaches bring includes knowledge about human behavior, theories, models, and frameworks that help them detect patterns in behavior. Coaches can use exercises with clients to help them experiment with new mindsets and behaviors that can enhance their performance. Research suggests that coaching is particularly useful in helping new leaders acquire skills that enable and influence change, such as repurposing existing resources, analyzing and interpreting complexity, and constructing narratives.

Mentoring

Mentoring pairs individuals with unequal knowledge and experience – one who has achieved what the other aspires to achieve. The mentee views the mentor as an expert, and may benefit from the resources and social capital that the mentor shares. A mentoring relationship can help emerging systems leaders learn the "ins and outs" of the role through authentic conversations with those who have made strides in the field. This approach can be harder to structure externally by a funder or intermediary.

Experiential Learning

Experiential learning is about learning through doing, and is a powerful form of individual development. It includes activities such as shadowing, job swaps, and brief stints working in other roles or capacities. Ideally, experiential learning occurs in conjunction with coaching and/or mentoring to support reflection about experiences, and how learning can inform the individual's future actions and behaviors.

Collective Development Strategies

There are two main types of collective development strategies: structured learning activities and learning communities and communities of practice.

Structured Learning Activities

Like all professionals, systems leaders benefit from opportunities to learn from others doing similar work. Conferences and other structured learning activities can present best, or promising, practices and new ways of thinking that re-energize groups to stay committed to systems change goals. These events may provide practical tools and resources that groups can learn about and experiment with, like systems and actor mapping. Leaders must be intellectually flexible, and well-facilitated learning activities can help them develop their systems thinking abilities, including deconstructing complexity for themselves and others, and/or identifying effective practices from elsewhere to apply.

Learning Communities and Communities of Practice

Learning communities and communities of practice allow individuals and groups to share their experiences, including challenges and successes, in the context of a safe environment. The opportunity to be among others "in the same boat" normalizes struggles, and enables idea exchange that can support creative and collective problem-solving among members. Participation increases social capital and encourages open-mindedness – an important quality for systems leaders.

INITIATIVE INSIGHTS AND LESSONS

How has systems leadership shown up in the Hubs investment?

More than halfway into the implementation of the Hubs, all four regional anchors have made strong progress on the foundational elements of systems change and systems leadership. Their efforts illuminate an emerging trajectory of how systems leadership characteristics may manifest themselves in a complex, regional undertaking – beginning with fundamental processes and structures, and advancing to more complex and, at times, technical undertakings. The JFF, Irvine, and evaluation teams used data and reflection conversations to assess the grantees' progress in the nine characteristics of effective systems leaders (Figure 4). We identified several themes, despite variation in progress across grantees.

Developing foundational mindsets and ways of working

The grantees have focused on building relationships and trust, developing an open mind, and co-creating structures. It is worth underscoring that the Linked Learning Regional Hubs of Excellence is not about establishing new partnerships and networks *per se,* but rather a change strategy that takes existing partnerships, initiatives, programs, and geographically diffuse efforts, and weaves those together into a regional approach. This change strategy, even more so perhaps than a new partnership effort, requires careful relationship management, trust building, and garnering stakeholder buy-in to a regional vision.

Figure 4   **SYSTEMS LEADERSHIP CHARACTERISTICS IN ORDER OF PROGRESS (HIGH TO LOW)**

Relationships and Trust

Co-creation of Structures to Support the Work

An Open Mindset

Systems Thinking

Empowerment

Effective Communication

Incentives and Payoffs

A Focus on Results

Unwavering Attention to DEI
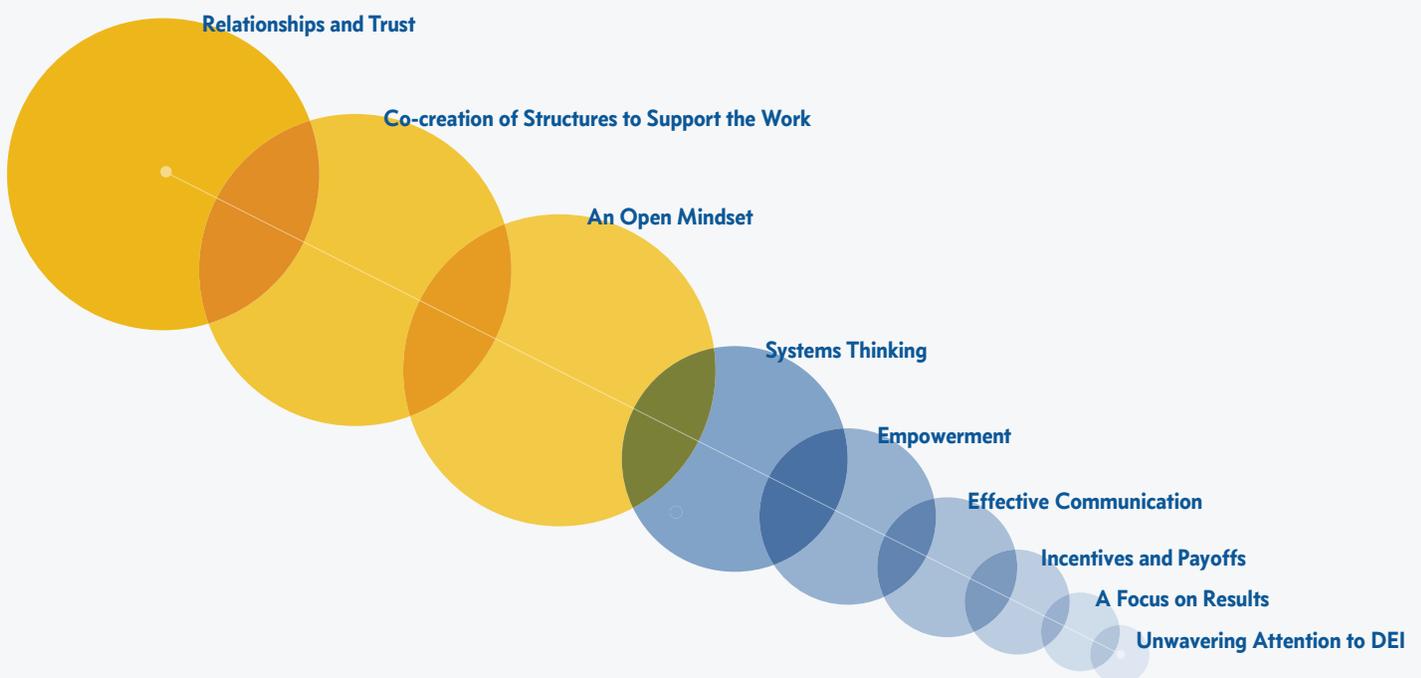
This is no small feat, as many existing partners already have been engaged in cross-sector partnerships that were time-consuming to establish. The anchors have aimed to convince these partners that weaving the work across an entire region, which has increased the complexity of the undertaking, is critical for long-term success and worth their investment of time and energy. This weaving – paired with the arduous task of building a regional, well-functioning, well-supported partnership – required more than 18 months of planning and design, socializing approaches, developing one-on-one and cross-partner relationships, and navigating ever-shifting contexts.

Integrating concepts over time

Early on, Hub leaders understood the need to build relationships and trust, to be open about new solutions, and to create structures for working together differently. However, the concepts of systems thinking and collective empowerment took more time for them to integrate. Some concepts came from contexts in which a single leader or organization had broad influence, and it took time to transition to a more collective approach to operating. The concept of systems change was new for some partners who were more accustomed to working on individual programs. Over time, through the multi-layered technical assistance strategy described above, Hub leaders and their partners became more attuned to the importance of systems thinking and working collectively to solve regional problems.

Effectively translating a well-branded model

Anchors have made strides in building relationships and trust with core partners; however, establishing resonant communications, and adapting and flexing the Linked Learning language and concepts with a variety of partners, particularly those unaccustomed to "edu-speak" (e.g., employers), has proven more difficult. Resulting from a decade of deliberate investment, research, communications, and policy efforts, Linked Learning has a very strong brand, especially among those working in the K-12 education sector. Once those outside the K-12 sector understand what Linked Learning is, they typically see the potential of its broad application across sectors and are open to engage with it. To gain buy-in and participation from their postsecondary and workforce partners, Hub leaders explained the Linked Learning model, but also opted in many cases to lead with language that was more relevant to individuals and their daily work. Pathway and workforce development language that focused on the overarching goal of the regional Hub – to improve outcomes for students and workers – generally sufficed. According to the funder, getting regional partners to work differently to improve outcomes has been a critical reframe as the initiative matures.

Tying incentives and payoffs to communications and individual partner benefits

Given the strong brand and substantial research in the K-12 system, the incentives for secondary education partners are clear. During the first half of implementation, Hub leaders have given critical consideration to Linked Learning incentives that resonate with postsecondary and workforce partners. They have focused on a variety of approaches, such as mapping organizational priorities and explaining how adapting Linked Learning concepts can advance their organizational needs and priority agendas. The emphasis now is to ensure that the approach can deliver on the promised incentives for all partners – and to do so with progressively less time and effort than usual.

Elevating process-related outcomes while awaiting longer-term student-level results

Maintaining a focus on results has been harder, due to greater attention to the mindsets and ways of working noted above. In addition, Hub leaders have voiced persistent concerns about gaps in data availability and use across systems, because data could enable partners to identify student-level changes linked to the initiative. While regional partners have not abandoned technical fixes and processes to track cross-partner data on student transitions and performance, they have increasingly become attuned to foundational victories, such as productive shifts in ways of working, development of partnership structures, increased quality of conversations, and early individual partner practice changes. These gains may serve as conditions for sustaining efforts in the long term that will eventually lead to individual student outcomes.

Achieving incremental measures of progress has helped increase the value of participation for regional partners, and has built momentum for student-level data sharing processes. The intermediary has guided anchors in identifying and recognizing the significance of process wins from the beginning of the initiative.

Integrating the values of diversity, equity, and inclusion from the onset, despite slow progress

Even though a foundational value of the Hubs investment was to increase educational and career success for all students across the regions, evidence of an explicit focus on breaking down systemic barriers is just beginning to emerge. In part because of the initial focus on other areas of work, DEI efforts have been slow moving. Regions have made some progress in expanding partnerships to include front-line service providers, educators, and, to a lesser extent, students. Some Hub leaders have indicated they are engaging in deeper conversations with partners about elevating issues of structural inequity that prevent students from becoming college and career ready.

Systems Leadership in Action: Examples from the Regional Hubs

CALIFORNIA

EAST BAY
The Anchor Prompts Workforce Intermediaries to Coordinate

The Intermediary Network, facilitated by the Oakland Metropolitan Chamber of Commerce, exemplifies a productive shift in ways of working. The Network brings together the multiple workforce intermediaries operating in the East Bay region to increase coordination with industry partners. Prior to the Network, intermediaries engaged in disjointed efforts to establish internship programs, collaborate with industry experts on curriculum planning, and invite employers to events. Partners noted the value of these meetings that enable intermediaries to connect, build relationships, and exchange information. They indicated that the Chamber is well-suited to facilitate the Intermediary Network, given its deep expertise in employer engagement. Through its convening power, the Chamber is leading efforts to regionalize the Network – which partners asserted could not happen without Hubs funding. Regionalization in the workforce intermediary context is uncharted territory; its success will rely heavily on the Chamber's systems leadership.

SAN BERNARDINO
The Anchor Builds Infrastructure to Advance Regional Goals

A consortium of organizations (San Bernardino County Superintendent of Schools' Alliance for Education; California State University, San Bernardino; and the Inland Empire Economic Partnership) established a cross-sector anchor structure to promote shared accountability to implement Linked Learning. San Bernardino County covers more than 20,000 square miles, and is the largest county in the nation, with four distinct geographic/economic regions. This multi-agency anchor structure provides a foundation for cross-sector investment and collaboration. Its executive board includes the County CEO, K-12 district administrators, the San Bernardino County Economic Development Agency, and industry executives. To support better communication and coordination among executive leadership, the operating board, and action teams, Hub leaders recently adopted the Alignment USA: San Bernardino County platform and online portal. The online tool is designed to enhance collaboration efforts among varied partners with features for sharing best practices and for tracking, measuring, and reporting collective progress.

Systems Leadership in Action: Examples from the Regional Hubs

CALIFORNIA

LONG BEACH
The Anchor Prioritizes Inclusion and Distributed Leadership

Formed in 2008, the Long Beach College Promise (LBCP) is a unique partnership with the Long Beach Unified School District; Long Beach Community College; California State University, Long Beach; and the Office of the Mayor. As the anchor, LBCP formed an executive leadership table, including key decision-makers from regional Hub partner organizations, to set vision and direction for the Hub. It also formed action teams focused on specific objectives (e.g., improving pathway formation, design, and quality), which include individuals from various institutions whose work directly relates to the objectives. One Hub leader reflected that through exercising patience and trust, the anchor's approach has provided partners with *"the freedom to work through things on their own or together as a group."* Because some partners are located outside of Long Beach City, the anchor changed its name from "Long Beach" to "ALL IN: Advancing Linked Learning Innovation Network," another example of Hub leaders' efforts to promote ways of working that are inclusive and flexible for all partners.

TULARE-KINGS
The Anchor Cultivates Cross-sector Communication and Trust

INNOVATE Tulare-Kings and the Tulare-Kings Linked Learning Consortium are bridging initiatives focused on education and employment pathways. Funded by the Hubs grant, as well as through pre-existing grants, INNOVATE Tulare-Kings is an employer-driven intermediary focused on "regional strategies that advance economic objectives, measure impact, and enhance education and workforce partnerships." It works in tandem with the Tulare-Kings Linked Learning Consortium of local school districts, originally brought together by state grants to form a collaborative network focused on advancing Linked Learning principles. Hub leaders are bringing together these two groups, as well as postsecondary partners, to coalesce their efforts. They are also helping to streamline communication, so that K-12 and postsecondary partners can speak with one voice to business and community stakeholders about the importance of Linked Learning. Along with better communication, partners agreed that Hub leaders have built greater cross-sector trust. Industry partners suggested that this growing trust has led to improved dialogue about industry-relevant curriculum, expansion of work-based learning opportunities for youth, and greater use of labor market information when shaping Linked Learning pathways.

CONSIDERATIONS FOR THE FIELD

What are the implications of this initiative for others leading or participating in systems change efforts?

Synthesizing the scholarship on systems leadership, and developing a typology of characteristics, are relatively simple activities. Applying these in day-to-day engagement to advance complex systems change is very challenging. Through the early efforts of Hub leaders and their regional partners, several cross-cutting themes have arisen. These themes may provide needed affirmation for those engaging in the vital role of systems leadership:

- **Difficulty**
  Few, if any, aspects of systems leadership or systems change are easy. Systems leaders deal with a high level of complexity and must find a way to manage it in order to persevere toward short- and long-term goals. Systems leaders are adaptable and "gritty," unwavering in their effort to achieve success.

- **Trust**
  Systems change work is highly relational, and trust came up frequently through review of the literature and interviews with key informants and Hub leaders. There are few, if any, short-cuts to establishing trust, and grant-cycle deadlines are often incongruent with the skillful processes of building relationships. Trust is a fundamental quality of human interaction that enables cooperation.

- **Empathy**
  Whether through its role in relationship-building and communication, elevating equity, or considering incentives for others, empathy is a primary competency in systems leadership. It involves listening with both your mind and your heart.

- **Humility**
  Systems change is not about one person or even one or a few institutions. It supersedes all self-interests and personal agendas to achieve something that benefits people at a grand scale. This quality should be evident in the minds, behaviors, and actions of the people engaged in the work. There may be partners that cannot adopt this humble stance, and it will be necessary to proceed without them.

- **Collaboration**
  From the outset, a diverse, inclusive team of system actors is the difference between success and continuation of the status quo. Systems leaders recognize that they do not possess all that is needed to get the job done. Collectively, actors at all levels of the system plan together, learn together, and distribute responsibility to see shared goals achieved. As one experienced leader reflected, *"If you're tackling something that you can do by yourself, chances are it's not worth doing."*

Considerations for Systems Change Efforts

SYSTEMS CHANGE LEADERS

What is your systems leadership theory and how might it adjust as the partnership evolves?

Based on the characteristics synthesized in this Issue Brief, where are your individual and collective strengths, and where may there be areas for future development? Consider whether there are other partners who can act as systems leaders that can augment or offset some of the missing skills or characteristics. Who can be authentic messengers or communicators on behalf of the partnership's agenda as the network of stakeholders expands? It may be worth reflecting on the systems leadership skills that were both present and absent in past systems change initiatives to determine whether certain traits were under-utilized or absent, and what will differ in the new effort. Self-assess systems leadership competencies. Identify support needed to build the capacity to lead systems change efforts.

Is your effort a new undertaking, or are you weaving existing partnerships toward a refined or new agenda?

Depending on whether this is a new effort or a change strategy, the approaches for vision setting, partner identification, and onboarding, as well as incentive setting, will be different. Develop a timing strategy for bringing on new partners based on when they can most benefit, and benefit from, the process. Knowing the extent to which individual and collective practices are ingrained in systems will help determine the level of effort to create buy-in and socialize the new strategy, agenda, or initiative.

How well do you understand the individual and organizational relationship dynamics among critical partners?

Conducting relationship-mapping due diligence – such as assessing existing relationships, historical dynamics including successes and failures, and understanding who is coming in new and where old allegiances lie – is an important first step in building trust and co-developing partnership structures.

SYSTEMS CHANGE LEADERS

What are the motivations of partners to come to the table, and is anyone missing?

Similarly, understanding why individual partners are coming to the table and, moreover, what will keep them coming is paramount to managing incentives and accountability. Understanding who has been historically missing from the conversation and whose perspectives are critical for generating innovation and solutions is an important consideration. Bringing the same partners together, no matter how well-intended, will likely lead to similar solutions. In addition, beware of partners with motives that are not aligned with the vision of the work, as they are apt to impede its progress.

How might you build in early proof points for this type of collaboration?

Systems change work takes time, and not everyone has the appetite or patience to wait for deeper, long-term results. Thinking strategically and in advance about ways to showcase near-term impacts can help keep stakeholders, from different sectors and serving in various roles, involved. For some stakeholders, it is enough to see partners come together in new ways, whether to define common outcomes or undertake joint efforts. Others will want to see more tangible outcomes for project beneficiaries – potentially demonstrated through pilot projects – or the ability to attract additional resources to a community.

What is your systems leadership theory, and how can you apply it as one dimension of grantee selection?

What systems leadership traits are you looking for, and who from the community can help you assess with whom these traits reside? Consider both individuals as well as institutional culture and function, as even the most forward-thinking and dynamic systems leaders will face challenges if they operate in organizations that are reticent to embody the collaborative processes, empathy, and hardships needed for collective change strategies.

What is your patience threshold for the time needed for systems leadership development and systems change processes?

Systems change efforts are long-term propositions. These efforts are predicated on what some would consider "soft" processes and relationship management activities that are hard to convey and even harder to elevate as progress to leadership and Board members who seek tangible evidence of change. Beyond expectation management, it is important to know and regularly revisit patience thresholds of foundation stakeholders, so that messages of progress do not turn into frustrations over process. Be prepared to discuss that systems leadership development is a meaningful and important area of change that takes time.

How will you create a safe space for sharing expectations, successes, and challenges with grantees?

Progress on process aside, there are likely expectations about change and outcomes that the funder has from the onset. It is better to know and manage funder expectations, revisiting these regularly along with summaries of on-the-ground change, than to learn that the shifts experienced in the first two years of implementation do not meet the initial assumptions. Frequent communication about progress, contextual, and investment factors accelerating or impeding progress can help align expectations. Being thoughtful about alleviating the power dynamic that is inherent in funder-grantee relationships can support mutual trust and better communication over the course of the engagement, reinforcing fundamental systems leadership qualities.

TECHNICAL ASSISTANCE

What is your systems leadership theory, and how can you integrate it into your technical assistance?

Before engaging in technical assistance and capacity-building efforts, be clear about your systems leadership theory. What traits are you looking to develop? How are these traits already evident among the leaders in your portfolio? What skills or ways of working do you consider critical for progress? Consider the relative priority of technical assistance and coaching related to leadership, as compared to other technical, content, and process assistance that may be needed. Building leadership is not a panacea for change, but one factor in the equation. The level of emphasis on systems leadership will likely differ based on the phase and maturity of the initiative, as well as the experience and disposition of the partners involved.

What is your philosophy of support, and does your team demonstrate that philosophy?

Technical Assistance partners require sufficient human capital and capacity to serve the variety of needs that grantees present. Consider the extent to which your team can model the competencies it seeks to develop in others. Internal skill-building and ongoing reflection will help ensure that the Technical Assistance provider delivers high-quality support.

What supports can you provide to continuously assess, reflect on, and refine your approach to developing systems leadership characteristics?

Since the need to build systems leadership will evolve with the initiative – given the coming and going of partners, the growth of the network, and the seasoning of the relationships – it is important to revisit and test for resonance the set of technical assistance tools at hand. Periodically assess the mix of individual and group development activities. Setting time aside to assess the salience of the coaching and group approaches is a good idea, particularly in multi-year efforts. Reviewing the impact and utility of support through collecting feedback will encourage a culture of continuous improvement, which is so often projected onto grantees.

The evaluation team drew from the following bodies of literature: leadership theory, systems leadership, collective impact, systems thinking, systems change, and organizational learning and development. The literature applied to various fields and sectors, including education, public housing, and workforce development.

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Key Informants

Key informants were identified by evaluation team members and through recommendations provided by colleagues, Jobs for the Future, and The James Irvine Foundation. The interview candidate pool aimed for diversity of race/ethnicity, gender, organization type, sector, and geographic region. Five of nine individuals responded affirmatively to the interview request.

Angelo Gonzales, Executive Director, Mission: Graduate

Ben Hecht, President and CEO, Living Cities

Bob Giloth, Vice President, Center for Community and Economic Opportunity, Annie E. Casey Foundation

Jeff Edmondson, Managing Director, Strive Together (now Managing Director, The Ballmer Group); Colin Groth, Director of Innovation, Strive Together (joint interview)

Terry Mazany, President and CEO, Chicago Community Trust

Anchor/Hub Leader Interviews

East Bay

Courtney Riley, Linked Learning Program Manager, Oakland Chamber of Commerce

Mark Butler, Linked Learning Industry Engagement Director, Oakland Chamber of Commerce

Rebecca Lacocque, Director of East Bay Career Pathways, Peralta Community College District

Long Beach

Cindy Bater, Program Administrator, Linked Learning Career Pathways, Long Beach Unified School District

Greg Peterson, Vice-President of Student Support Services, Long Beach City College

Simon Kim, Associate Vice President for Research and Sponsored Programs, Academic Affairs, California State University, Long Beach

San Bernardino

Debra Mustain, Chief of Operations, Alliance for Education, San Bernardino County Office of the Superintendent of Schools

Jay Fiene, Dean, College of Education, California State University, San Bernardino

Maral Hernandez, Director of Education and Workforce Partnerships, Inland Empire Economic Partnership

Tulare-Kings

Randy Wallace, Executive Director, Innovate Tulare-Kings

Jennie Bautista, Assistant Executive Director, Innovate Tulare-Kings

Kris Costa, Career Pathways Engagement Manager, Tulare County Office of Education

Joy Soares, Director, Tulare-Kings Linked Learning Consortium

OPPORTUNITY

Act regionally to elevate the scale and adoption of Linked Learning — helping more students gain equitable access to this practical, powerful approach.

- rigorous academics
- work-based learning in real-world workplaces
- a sequence of career-technical education courses
- embedded support services

Linked Learning
REGIONAL HUBS OF EXCELLENCE

A regional hub of excellence is a place where all partners are active and united in delivering the benefits of Linked Learning — based on a shared interest in, and need for, young people to succeed.

THINKING REGIONALLY
This approach crosses boundaries to connect Linked Learning players who can do — and gain — more together.

ACTING IN CONTEXT
Every region has a distinct landscape and culture, and brings the characteristics of a hub to life in its own way.

Student success defined:
☑ Complete high school on time ☑ Earn postsecondary credential by age 25 ☑ Engage in work that can sustain a family

INITIATIVE STRATEGIES

Regional hubs will support change within and across partner organizations through these Linked Learning strategies:

1. **Deepening** quality within existing K-12 district pathways
2. **Scaling** within schools, to more schools and to more districts
3. **Aligning** pathways across secondary, postsecondary and workforce systems
4. **Adopting & adapting** Linked Learning principles to postsecondary and workforce contexts

IN PRACTICE

By investing in three levers...

- Strengthening leadership
- Partnership development
- Systems change

and focusing on key elements...

- Anchor organizations
- Integrated pathways
- Postsecondary engagement
- Work-based learning & employer engagement

we will make progress toward our goal.

- Coordinated regional delivery systems
- Raised awareness of value and impact
- Expanded, high-quality pathways
- Improved academic and career outcomes
- Engaged postsecondary advocates
- Aligned talent pipeline for employers

GOAL
Increase **number** of and **demand** for Linked Learning graduates and pathways.

The James Irvine Foundation   LINKED LEARNING   JOBS FOR THE FUTURE

SYSTEMS LEADERSHIP ATTRIBUTES AND SKILLS

The content of this table draws from literature and critical informant and anchor interviews. Attributes are qualities about the person that may be innate or developed through experiences. Skills are abilities that the person can hone through instruction, practice, and experience. Because the themes are not mutually exclusive, there are cross-cutting attributes and skills that appear more than once.

THEME	DESCRIPTION	LEADER ATTRIBUTES	LEADER SKILLS
Systems Thinking	Understand nuance, while maintaining the "big picture" and seeing the dynamics inherent within complex systems	Adaptable Analytic Curious Learning-oriented Organizationally aware Visionary	Deconstruct complexity Demonstrate adaptive leadership Detect patterns and interrelationships Develop vision Maintain awareness of what's happening on the ground Understand root causes
An Open Mindset	Embrace learning, ambiguity, risk, and experimentation	Adaptable Brave Creative Curious Flexible Inclusive Learning-oriented Optimistic Reflective Solution-minded	Ask powerful questions Demonstrate adaptive leadership Learn from mistakes
Unwavering Attention to Diversity, Equity, and Inclusion	Apply diversity, equity, and inclusion as a lens during the systems change effort	Altruistic Brave Inclusive Organizationally aware Self-aware Socially aware	Bridge divisions Facilitate discussion Listen Structure group engagement
Relationships and Trust	Create productive working relationships and shared trust among multiple stakeholders in the system	Altruistic Authentic Empathetic Honest Patient Sincere Socially aware	Craft resonant narratives Develop strong ties Listen Resolve conflict Understand others' perspectives

THEME	DESCRIPTION	LEADER ATTRIBUTES	LEADER SKILLS
Effective Communication	Hear points of view that might be different from their own and craft resonant narratives	Amiable Empathetic Forthright Transparent	Bridge divisions Craft resonant narratives Explain things clearly Facilitate discussion Listen Manage expectations Structure group engagement
A Focus on Results	Help others stay focused on results, especially changes that will improve programs, services, and outcomes for intended beneficiaries	Achievement-oriented Analytic Patient Perseverant Resilient	Communicate results Interpret data
Co-creation of Structures to Support the Work	Work collaboratively with partners and stakeholders to develop processes and structures that facilitate joint work	Analytic Inclusive Organizationally aware Visionary	Bridge divisions Design work plans Facilitate discussion Listen Manage expectations Manage work plans Structure group engagement
Empowerment	Establish ways to promote the collective as the unit of influence (rather than the individual) and the inclusion of all system actors	Humble Organizationally aware Self-aware Service-oriented Socially aware Empathetic Forthright Transparent	Delegate work Develop others Craft resonant narratives Listen Manage expectations
Incentives and Payoffs	Create opportunities for individuals at multiple levels of the system to see benefits of their participation in the short and long terms	Empathetic Forthright Transparent	Craft resonant narratives Listen Manage expectations