



New Schools for New Orleans

CEO competency profile/playbook

Spring 2019

Executive summary

- Successful CEOs of CMOs execute five key categories of **competencies** with consistency and fidelity: 1) set the direction, 2) maximize talent, 3) manage the organization, 4) engage stakeholders, and 5) drive to results
- CEOs' execution of these competencies is driven by six fundamental **mindsets**: 1) organization ownership, 2) reflectiveness, 3) diversity, equity, & inclusion lens, 4) learner, 5) reliability and follow-through, and 6) NOLA commitment
- Based on our research, successful CEOs have significant **previous education experience** as classroom teachers and school-level leaders, positioning them to have both the technical expertise and experience to credibly lead their respective organizations
- As expected, **in practice**, these competencies and mindsets play out differently depending on the leader profile and situational context. One thing that consistently holds: the transition from principal to CEO (the most common path we observed) demands that leaders broaden their skill set to drive results through systems development and coaching and management of other senior leaders
- CEOs effectively shift the focus of their **time**, taking into account key contextual factors of their organization- initial focus on high-quality school programming, continued development of school and network leaders, and greater external focus as organization scales or stabilizes
- CEOs build high-functioning **senior leadership teams** that complement their individual skill sets and demonstrate shared ownership for the vision and ultimate success of the organization

CEO Profile

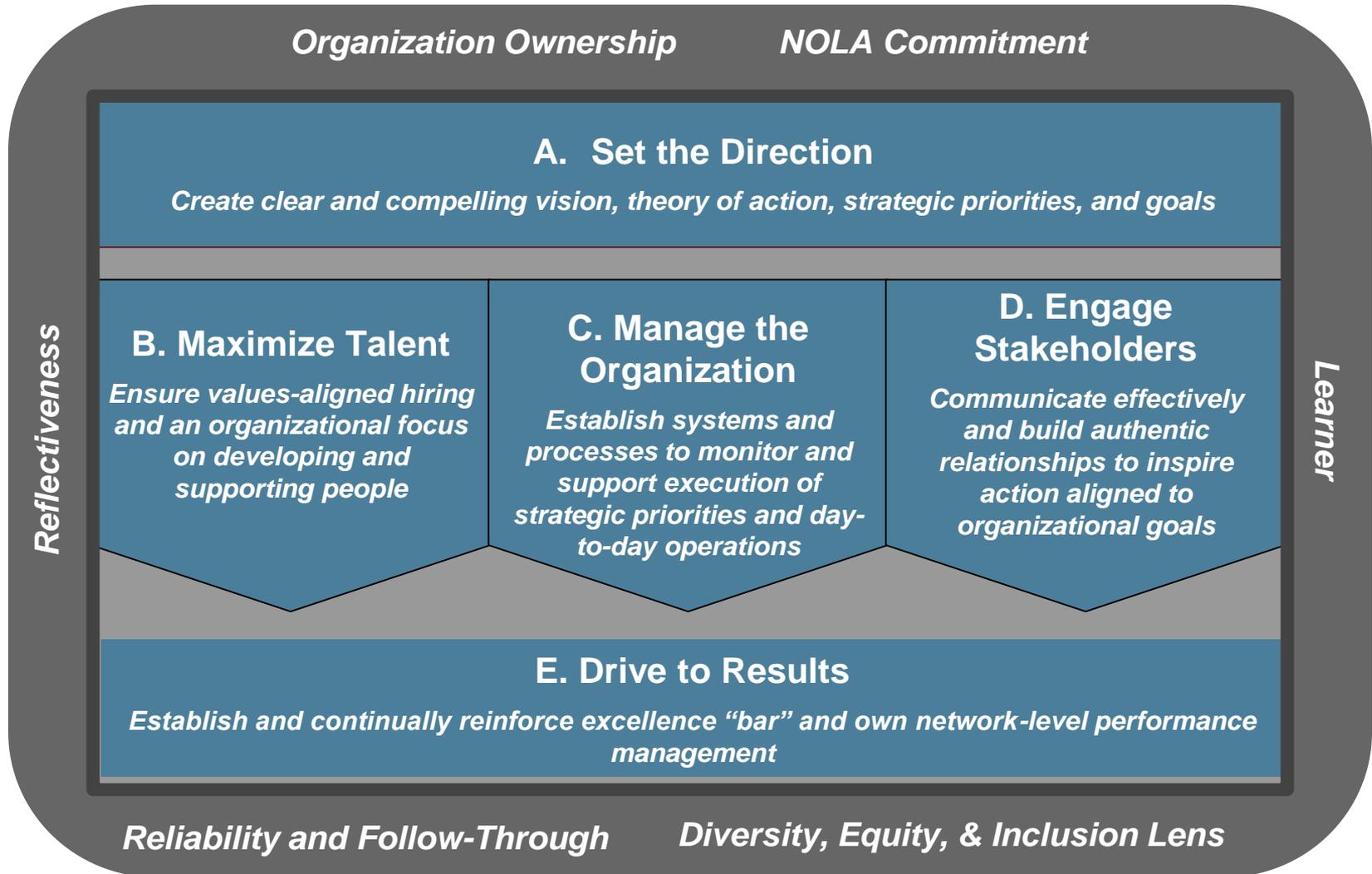
CEO Profile

1. The **competencies and mindsets** most critical to the CEO's success
2. The **prior experience** critical to success in the CEO role

CEO Playbook

1. How those competencies play out **in practice** in the CEO role vs. typical pre-CEO roles (e.g. school principal)
2. The areas or activities where CEOs choose to invest the most **time**
3. How successful CEOs build, deploy, and **manage their leadership team**

We have identified five competency categories most essential to CEO success, all of them anchored by six critical mindsets



CEO competencies and rationale (1 of 2)

Category	Competencies	Rationale
A. Set the Direction	<p>A1. Ensures network-wide alignment around a clear vision, mission, and core values</p> <p>A2. Develops collaboratively an actionable theory of action (TOA)/strategic priorities to achieve goals</p> <p>A3. Establishes priority annual and multi-year goals</p>	<ul style="list-style-type: none"> • A compelling and clearly articulated vision, mission, and core values provide the shared “north star” to guide the organization’s behaviors • An actionable TOA ensures there is a roadmap for achieving organizational goals • Measurable short and longer-term goals focus the organization on what matters most and are essential for performance monitoring and accountability
B. Maximize Talent	<p>B1. Identifies, hires and develops a values-aligned senior leadership team</p> <p>B2. Establishes a culture of ongoing individual support and development</p> <p>B3. Sets a high bar for excellence and holds the team accountable for progressing toward that bar</p>	<ul style="list-style-type: none"> • The CEO must lead primarily through his/her senior leadership team; therefore building and developing the right team is paramount • To build a strong talent pipeline, each team member must be focused on improving and all leaders must be focused on developing their staff • A focus on support must be balanced with an emphasis on excellence and clear accountability if adequate progress toward that bar is not made
C. Manage the Organization	<p>C1. Aligns organizational resources and focus areas to strategic priorities and to ensure sustainability</p> <p>C2. Implements systems to monitor network-wide progress toward goals</p> <p>C3. Ensures systems in place to respond to challenges and continually improve performance</p>	<ul style="list-style-type: none"> • The CEO must ensure school and functional leads have the resources and supports needed to achieve agreed-upon priorities • A mix of formal (e.g. quarterly data days) and informal check points (e.g. weekly 1:1 updates) ensure timely understanding of progress toward goals • Systems of support/improvement must be in place to address challenges that are identified through monitoring

CEO competencies and rationale (2 of 2)

Category	Competencies	Rationale
D. Engage Stakeholders	<p>D1. Regularly communicates with all staff to inspire, reinforce priorities, and provide actionable information</p> <p>D2. Strategically and regularly engages the board, especially the board chair and committee chairs</p> <p>D3. Differentiates approach to stakeholder engagement, to strategically build support and ensure sustainability*</p>	<ul style="list-style-type: none"> Effective communication is essential to alignment and engagement; the CEO provides key information at the right time, matching the medium to the stakeholder group and the message's intended impact The CEO recognizes the strategic and supportive role an effective board can play, and prioritizes investing in relationships with the most critical board members The relative importance of external stakeholder groups varies depending on context; the CEO understands this and prioritizes time and energy first with groups most critical to school success (parents, community members, funders) and second to support city-wide conditions for success for all students (OPSB, state/local entities)
E. Drive to Results	<p>E1. Keeps high bar for student achievement front and center at all times</p> <p>E2. Ensures shared understanding of what excellence looks like and manages to that bar</p> <p>E3. Regularly and transparently shares results, celebrating success and naming improvement areas</p> <p>E4. Takes decisive action / makes difficult decisions when performance monitoring reveals issues</p>	<ul style="list-style-type: none"> Achieving ambitious results requires the CEO to continually inspire, challenge, and motivate staff and students to succeed by holding student outcomes at the forefront of all interactions The CEO must ensure there is a clear and shared understanding of the excellence required across functions and at multiple levels (classroom, school, network) to achieve student outcome goals Regular reporting of results increases a sense of collective accountability; celebrating success shows what is possible and raises the bar for all staff The CEO must be clear-eyed about areas that need improvement and must act decisively to address challenges (starting with direct conversations and, as necessary, in personnel changes)

*See Appendix section for additional detail

NOLA context: We have identified aspects of these competencies most essential to success in NOLA (1 of 2)

Category	NOLA-specific additions	Rationale
A. Set the Direction	The organizational vision, TOA, and goals include an emphasis on supporting all students and developing the whole child.	As an open enrollment system, schools must effectively support all students, including the most vulnerable. The generational poverty in NOLA is greater than in many other places. In addition, NOLA lacks the community supports/ infrastructure that exists in many other places to meet student and family needs. The school must step in to provide these supports.
B. Maximize Talent	There is a strong emphasis on growing and retaining talent to build a “talent bench” that will sustain the organization over time.	The talent pool is not as strong in NOLA as in some other markets (e.g Boston, NYC, DC, San Francisco). Success cannot be achieved or sustained through great hiring alone. Talent must be developed over time.
C. Manage the Organization	The CEO ensures there are adequate resources allocated to create a high challenge/high support environment , including whole child supports and a values-aligned discipline approach.	The combination of high student need <i>and</i> a choice-driven system in NOLA means that effective CMOs must tend to students’ social, emotional, and behavioral needs, in a way that makes students and families feel engaged and respected. Therefore, the CEO should advocate for additional and adequate resources from OPSB to support the whole child and to implement a discipline approach that emphasizes non-exclusionary, developmental strategies.

NOLA context: We have identified aspects of these competencies most essential to success in NOLA (2 of 2)

Category	NOLA-specific additions	Rationale
D. Engage Stakeholders	The CEO understands NOLA-specific contextual factors and builds appropriate relationships to realize organization vision (i.e. district relationship, alliances to improve operating conditions).	Particularly in New Orleans, external engagement is central to the CEO's role. An effective CEO is engaging community members to strengthen a shared understanding of the school's vision and TOA. The CEO also works collaboratively to advocate with OPSB and/or other entities (CMOs, city/state officials, advocacy orgs) to ensure the most ideal conditions to reach organization's vision and outcomes.
E. Drive to Results	The CEO understands how the NOLA talent pool challenge and significant student need impacts the work without lowering the bar.	CEO does not have luxury to replace all under-performing teachers and/or serve a subset of student population that may be easier to educate. CEO must work with school leaders to maintain an urgency for excellence while creating the opportunity and time for teachers to develop.

Competency shifts from principal* to experienced CEO

Competency/Role	Principal	CEO
A. Set the Direction	Focus on instruction: Develop goals and action plan to advance instructional improvement	Crystalize organization <u>focus</u>: Select most critical goals to attack and prioritize among greater number of potential levers for achieving those goals
B. Maximize Talent	Hire great teachers: Deeply understand how to identify great teachers Develop others: Directly coach and develop staff	Hire great <u>leaders</u>: Deeply understand how to identify great people managers Develop <u>through</u> others: Support managers to effectively coach and develop staff
C. Manage the Organization	Manage by “walking around”: Spend most time in classrooms, directly observing teacher practice (in addition to data review)	Manage through <u>systems</u>: Coach network leaders to implement program across org Manage across <u>more competing priorities</u>: Understand where to invest time to drive greatest impact
D. Engage Stakeholders	Build personal relationships: Invest time in getting to know all staff and students	Differentiate approach to relationship building: Invest most personal time in leadership team; identify targeted ways to build relationship with all staff; invest more time in external stakeholder engagement
E. Drive to Outcomes	Personally monitor and manage to school outcomes: Understand classroom-level data and take timely action to address gaps	Monitor and manage <u>through</u> others: Leverage senior leadership team to drive toward network outcome targets and overall performance

*We chose to focus on the transition from principal because 7 of 8 CEOs studied made this transition

We have identified five universal CEO mindsets and one specific to the New Orleans context

Mindset	Description
Organization Ownership	<ul style="list-style-type: none"> Commits fully to owning success and failures of the organization, investing whatever time is needed to ensure outcomes goals are met
Reflectiveness	<ul style="list-style-type: none"> Embraces the power of reflection to drive personal and organizational growth and effectiveness Recognizes personal strengths and weaknesses, ensuring organization staff has complementary skill set to execute on vision
Diversity, Equity, & Inclusion Lens	<ul style="list-style-type: none"> Drives toward an organizational vision that is deeply rooted in equitable education access and outcomes for all students Strives to foster an organizational culture that values diversity and inclusion, particularly focused on hiring, developing, and retaining a staff that is representative of the student body
Learner	<ul style="list-style-type: none"> Seeks out opportunities to observe best practices across the country to continuously improve organization model Approaches development of staff with a growth mindset, demonstrating a faith in self and others to provide students what they need regardless of challenges they confront
Reliability and Follow-through	<ul style="list-style-type: none"> Models consistency in action, follow through, and builds trust with others through this reliability Understands the importance of accountability and follow-through across entire organization
NOLA Commitment	<ul style="list-style-type: none"> Understands NOLA context deeply, understands parent choice-driven enrollment system, and commits to serve all students in the city Manages the tension of recognizing great student need in the city and maintaining a high bar of excellence for students Collaborates across stakeholders (CMOs, OPSB, city/state entities) to drive policy decisions that best position all organizations to serve students well in New Orleans

Our research supports the conclusion that significant previous education experience is critical to CMO CEO success

- Classroom experience gives aspiring CEOs a firsthand understanding of the practices that contribute to teacher success, the types of tools and supports that help them improve, and the pressures and constraints they face. This is essential knowledge as new CEOs focus on designing, implementing and continuously improving systems to strengthen instructional practice. **Based on findings from our sample, previous classroom teaching experience is a “must have” for a new CEO.**
- School leadership experience enables aspiring CEOs to translate the success they had as classroom teachers to success in coaching other teachers to improve and leading to results through others. Aspiring CEOs also begin to take responsibility for the results of multiple teachers in these roles, and build their ownership mindset. **We see some time of previous school leadership experience as a second “must have” quality for new CEOs.**
- **The deep instructional knowledge that aspiring CEOs develop through classroom teaching and school leadership experience is particularly important in small CMOs and to CEOs stepping into under-performing organizations.**
 - In small CMOs, CEOs often do not have the budget to hire a great CAO and therefore often play the academic lead role themselves.
 - In under-performing CMOs, the first and most critical job is to improve instructional practice through smart hiring and teacher development. The CEO must have the knowledge and skills to drive these core priorities.

CEO Playbook

CEO Profile

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CEO Playbook

1. How those competencies play out **in practice** in the CEO role vs. typical pre-CEO roles (e.g. school principal)
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In practice: Competency A. Set the direction

A. Set the Direction	
Competencies	In practice, the CEO...
A1. Ensures network-wide alignment around a clear vision, mission, and core values	<ul style="list-style-type: none"> • With senior leadership team, and with input from staff, creates and aligns clearly worded statement of vision, mission, and core values, grounded in the CEO's deeply held personal values and experience as a leader in high-performing schools • Creates consistent opportunities, in person and writing, to champion the vision and align the staff around it, particularly leveraging organization-wide gatherings • Ensures all organization leaders (senior leadership and school principals) consistently reinforce the network vision across all staff
A2. Develops collaboratively an actionable theory of action (TOA)/strategic priorities to achieve goals	<ul style="list-style-type: none"> • In collaboration with the senior leadership team (and outside experts, if needed), and with input from school leaders, develops a theory of action that identifies the strategic priorities or "big rocks" the organization must execute against in order to achieve its vision • Creates clear connection between current performance and how TOA, if executed at a high level, will increase student success • Ensures all senior leaders reinforce TOA in all interactions (team meetings and individual check-ins)
A3. Establishes priority annual and multi-year goals	<ul style="list-style-type: none"> • With senior leadership team, creates "dashboard" of organization's multi-year and annual goals, prioritized to guide implementation of the TOA • Through other senior leaders, ensures organization functional and school teams align their goals to organization TOA • With senior leaders, manages an annual planning process that begins in the spring and utilizes available data to drive creation of plans (i.e. budget funding, achievement data) • Based on when new dashboard data is available, sets functional and school team data analysis meetings (3-5x annually) and aligns individual check-ins to review data; ultimate goal is to refine implementation plans toward the annual goals

In practice: Competency B. Maximize talent

B. Maximize Talent	
Competencies	In practice, the CEO...
B1. Identifies, hires, and develops a values-aligned leadership team	<ul style="list-style-type: none"> • Is reflective about his/her own values and strengths/weaknesses and proactively seeks out senior leadership team staff who share the same values and also fill in gaps in the CEO's skill or knowledge set • Makes values and leadership style explicit during hiring process to ensure a good match • Makes adjustments and additions to the senior leadership team as new needs arise (e.g. during expansion) • Serves as a thought partner and coach to senior leadership team members and supports them in accessing development resources as needed
B2. Establishes a culture of ongoing individual support and development	<ul style="list-style-type: none"> • Models a commitment to learning in the CEO role by consistently seeking out insight from other CEOs and attending formal professional development opportunities (i.e. leadership conferences/convenings, exemplar school visits) • Commits to a regular cadence of weekly and/or biweekly check-in meetings with senior leadership team members; creates structures for all staff throughout the organization to have a regular cadence of check-ins with their direct reports to review progress toward individual, school, and network goals • Establishes regular opportunities for staff to collaborate and engage in professional development before, during, and after the school year
B3. Sets a high bar for excellence and holds the team accountable for progressing toward that bar	<ul style="list-style-type: none"> • Sets ambitious short-term and long-term goals and consistently communicates belief that senior leadership team members can achieve those goals • Communicates trust by allowing senior leadership team broad autonomy in developing and carrying out a plan to meet their individual, team, and organization-aligned goals; monitors progress against plan and provides honest, constructive, and timely feedback when a team member is not meeting high performance standards

In practice: Competency C. Manage the organization

C. Manage the Organization	
Competencies	In practice, the CEO...
C1. Aligns organizational resources and focus areas to strategic priorities and to ensure sustainability	<ul style="list-style-type: none"> • Identifies the resources and skills that school and organization leaders will need to carry out strategic priorities • Ensures there is a clear understanding of the drivers of financial sustainability, and a model in place for achieving sustainability (which may include some degree of ongoing fundraising) • Invests in providing those strategic resources and support for skill development to school and network leaders (i.e. staff, curriculum, student support partnerships) • Understands school and network leaders' competency areas and assigns responsibility for strategic priorities in a way that maximizes each leader's strengths
C2. Implements systems to monitor network-wide progress toward goals	<ul style="list-style-type: none"> • With senior leadership team, creates consistent review process of "dashboard" of metrics to determine level of success in executing TOA consistently across CMO • Identifies the data needed to track progress toward those goals and works with senior leadership team to create data collection tools such as a school walkthrough rubric or staff survey if needed • Ensures that at each level of the organization (classroom, school, and network), relevant data is collected, aggregated, and rolled up into the dashboard for efficient visibility into progress across the organization
C3. Ensures systems in place to respond to challenges and continually improve performance	<ul style="list-style-type: none"> • Creates structures for all staff throughout the organization to have a regular cadence of check-ins with their direct reports to review progress toward individual, school, and network goals • Establishes clear responsibilities, decision rights, and feedback loops for each role • Models and prioritizes an organization-wide culture of using data to identify effective practices, problem-solve, and set targets for improvement

In practice: Competency D. Engage stakeholders

D. Engage Stakeholders	
Competencies	In practice, the CEO...
D1. Regularly communicates with all staff to inspire, reinforce priorities, and provide actionable information	<ul style="list-style-type: none"> • In meetings, professional development sessions, and school events, explicitly and consistently ties conversation back to organizational mission and strategic priorities • Establishes formal routines for communication at all levels, such as weekly CEO email, daily morning huddle with organization central team, alignment with school leaders on organization messages to school staff in weekly staff notes (if applicable) • Establishes systems to recognize and reward excellent performance among staff, such as monthly teacher appreciation events or quarterly awards with prizes such as gift cards
D2. Strategically builds and regularly engages the board, especially the board chair and committee chairs	<ul style="list-style-type: none"> • Invests time in building relationships with board members (e.g. by attending trainings with them or inviting them on school visits) • Is intentional about ensuring that board composition includes the necessary range of expertise to achieve strategic priorities • Adjusts board composition as needed as strategic priorities change (e.g. adding more financial expertise and fundraising power as network expands) • Proactively engages the board in succession planning for CEO and leadership level roles
D3. Differentiates approach to stakeholder engagement, building support in a strategic manner	<ul style="list-style-type: none"> • Garners support from funders and policymakers by speaking passionately, urgently, and succinctly about school's mission and vision • Earns the trust of parents and community members by approaching interactions with humility, respect, and clarity of purpose • Proactively cultivates relationships and collaborates with fellow CEOs and with OPSB, city and state entities to advocate for mutually beneficial policies in the city

In practice: Competency E. Drive to results

E. Drive to Results	
Competencies	In practice, the CEO...
E1. Keeps high bar for student achievement front and center at all times	<ul style="list-style-type: none"> • For every decision, prioritizes the path that is most likely to maximize student results • Uses data to monitor trends in student achievement throughout the year, and problem solves to improve results for any group of students showing patterns of lower achievement • Is prompt and direct in pointing out when organization and school leaders' performance is not producing desired student results, and pushes them to find better solutions
E2. Ensures shared understanding of what excellence looks like and manages to that bar	<ul style="list-style-type: none"> • Ensures alignment across the senior leadership team, organization central team, and school leaders related to the expected performance bar for each team member • Uses direct senior team member check-ins/school leader meetings, as well as formal/informal school observations, to reinforce and model execution bar for all leaders
E3. Regularly and transparently shares results, celebrating success and naming improvement areas	<ul style="list-style-type: none"> • Establishes routines to share and celebrate successes (e.g. at monthly school meetings and annual all-CMO retreats) • Establishes routines to collectively examine student results and develop plans to address areas for improvement (e.g. at quarterly organization-wide "data days")
E4. Takes decisive action / makes difficult decisions when performance monitoring reveals issue	<ul style="list-style-type: none"> • Provides prompt and constructive feedback. If a school or organization leader's performance is not meeting expectations, CEO aligns resources and a plan to improve performance • If the leader's performance does not improve with support, does not hesitate to make a personnel change • Encourages school leaders to use the same approach with school-level staff

How CEOs spend their time depends on a variety of contextual factors

The amount of time spent on different types of activities shifts over a CEO's their tenure in the role. However, they varied widely in the amount of time they reported spending on each category of activity at each stage of their tenure. A variety of factors contribute to the differences among CEOs in how they allot their time.

Factors Influencing CEO Time Allotment

Life Stage of the CMO	<ul style="list-style-type: none"> All CEOs in our study were founding leaders who built their network out from just one or two schools. A founding CEO is likely to need to spend a large portion of his/her time (~40-45%) developing systems to manage the organization For CEOs taking on leadership of a more established, stable CMO, these management systems would likely already be in place and require less time
Strength of the Leadership Team	<ul style="list-style-type: none"> Especially in Year 1, the amount of time a CEO spends on maximizing talent will depend partly on how strong the senior leadership team is. For example, one CEO rated this category comparatively low for Year 1 (about 20%, compared to 35-60% for other CEOs), but he had hired successful principals, who he already knew, to be on his leadership team and run schools, so he started with a high degree of trust and confidence in his team Other CEOs spent more time early on building relationships with their senior leadership teams and/or finding the right people to fill out the team
CMO Stability	<ul style="list-style-type: none"> An external CEO taking on an under-performing organization will need to spend much more time on setting the vision and building management systems than an internal CEO in a stable CMO. In fact, one CEO suggested that in an under-performing CMO, the leader should dedicate half of his/her time in Year 1 specifically to assessing the state of the organization and collaboratively developing, revising, and refining the vision, values, and goals By contrast, in Year 1 at a stable CMO the CEO would spend much less time on vision and course correction
CEO Experience and Strengths	<ul style="list-style-type: none"> A person stepping up from the school level into the CEO role will need to spend more time in early years than a seasoned CEO developing organizational management systems A CEO coming in with fewer networks among key NOLA stakeholders would need to spend more time on stakeholder engagement than someone coming in with existing networks, name recognition, and/or familiarity with NOLA Over time, a CEO may settle into spending more of their time in his/her particular areas of strength--for example, relationship management or operational details--and delegate weaker areas to other senior leadership team members

CEOs tend to spend the most time on critical activities related to managing the org, maximizing talent, and engaging stakeholders

Manage the Organization

- Weekly senior leadership team meetings*
- Weekly 1:1 meetings with senior leadership team members (in additional to informal communications)
- Meetings and walkthroughs with school leaders
- Weekly or biweekly data review and planning

Maximize Talent

- Recruitment activities to ensure organization-aligned staff hires
- Coaching senior team and principals in management/leadership
- Cultivating a talent pipeline through formal and informal development opportunities for aspiring leaders

Engage Stakeholders (increasing over time in the role)

- Communicating and meeting with the Board
- Participating in community events and meetings with families & community leaders
- Develop and manage funder relationships to ensure organization sustainability
- Cultivating relationship with OPSB, city and state entities to drive strategic priorities
- Building relationships with other NOLA CMOs, to share practices and collectively drive priorities
- Managing interest from other CMOs, policymakers, and stakeholders as a national model

Initially, CEO spends the majority of time developing accountability culture to establish “bar” and hiring and developing effective, mission-aligned staff to achieve immediate results.

Once expectations are in place, CEO can shift more focus to external relations.

*Senior leadership team includes C-level team members and principals or functional leads (CEO preference)

Newly hired CEOs should invest additional time assessing the current state and developing a clear vision

		Stable Organization	Under-Performing Organization
% Time Spent on Activity	Internal CEO		
	Assessing organization's current state	5%	15%
	Developing/revising/refining vision, values, goals	5%	20%
	External CEO		
	Assessing organization's current state	10%	25%
	Developing/revising/refining vision, values, goals	10%	30%

- New CEOs transitioning into the role spend a good deal of time initially focused on completing a current state assessment of the organization and defining the organization vision
- Based on 1) how well the CEO knows the organization and 2) the overall health of the organization, the CEO will allot time on assessment and vision accordingly (see chart above)
- Most important, CEOs transitioning into the role understand how important it is to set a clear vision and then ensure the senior leadership team members are competent and commitment to vision for the organization moving forward
- CEOs do not hesitate to make senior leadership team changes if competence and/or organization alignment are an issue

Under-performing CMOs: Beyond org health and vision, CEOs leading under-performing CMOs focus heavily on academic bar

- CEOs leading **under-performing organizations** recognize **school stabilization as an immediate time priority**
- New to the role, the CEO understands how important **early academic wins** are to both **motivate staff/students** and **instill confidence in his/her leadership** of the organization across **all stakeholders**
- In an under-performing **organization**, the CEO must **come with a strong academic lens**, ensuring that a **high bar for school culture and instruction is established** across all schools
- In most cases, under-performing organizations do not have a strong CAO, so the **CEO plays this role until they are able to develop one internally**
- CEOs spend significant time **coaching school leaders** so they can ultimately **hold the high bar consistently on their own**
- Once an internal CAO candidate is ready, the **CEO will transition this direct work** and allocate more time to **coaching others and other external engagement** efforts

Scaling CMOs: There are also general shifts in time allotment for CEO management practices as a CMO scales

1 School

Manage the Organization

Internal management and accountability **take up the largest portion of time**. Key activities include:

- Developing strategic plan
- Developing continuous improvement and accountability systems
- Visiting classrooms 3-4 days per week
- Modeling high bar for instructional excellence
- Weekly meetings with senior leadership team as a group and individually.

Maximize Talent

Maximizing talent is **nearly as large a focus** as organizational management. Key activities include:

- Developing recruiting and hiring systems aligned to core vision
- Developing PD systems
- Coaching teachers and leadership team
- Motivating staff and celebrating high performance

Engage Stakeholders

External engagement **takes up much smaller portion of time** than other categories. Key activities include:

- Cultivating board relationships
- Building relations with CMO leaders, OPSB, and city/state officials
- Attending community events

2-3 Schools

Manage the Organization

Internal management and accountability **remains a large focus of time**, with shift to more time on talent development. Key activities include:

- Refining strategic plan
- Refining and codifying continuous improvement and accountability systems
- Visiting schools 2-3 times per week
- Weekly meetings with senior leadership team as a group and individually

Maximize Talent

Investing in talent is an **increased focus** to build team capacity and talent pipeline. Key activities include:

- Refining recruiting, hiring, and PD systems
- Establishing a career ladder/internal pipeline
- Coaching school and network leaders
- Motivating staff and celebrating high performance

Engage Stakeholders

External engagement becomes more important but typically **remains less of a priority** than other categories. Key activities include:

- Refining board systems and roles
- Strengthening relations with CMO leaders, OPSB and city/state officials
- Attending community events
- Hosting external visitors

4+ Schools

Manage the Organization

Internal management and accountability **take up relatively less time as strong senior leaders play an increased role**. Key activities include:

- Managing continuous improvement and accountability systems *through the senior leadership team*
- Visiting schools 1-2 times per week
- Weekly meetings with senior leadership team as a group, and one-hour 1:1 meetings

Maximize Talent

Investing in talent is a **substantial focus** with an emphasis on developing leaders and coaching leaders to develop their teams. Key activities include:

- Continuing to refine PD systems and leadership development pipeline
- Succession planning for whole C-team
- Coaching senior leadership team members
- Motivating staff and celebrating high performance

Engage Stakeholders

An **increased and significant portion of time** is spent on engaging stakeholders. Key activities include:

- Strategically leveraging board expertise
- Strategic advocacy with CMO leaders, OPSB, and city/state officials
- Attending and hosting community events
- Managing national visitors and interest

Note: These are general trends in time shifts. Actual distribution of time will vary based on factors described on Slide 31.

CEOs are self-aware and build leadership teams that possess the diverse skills necessary to run an effective organization

Team composition

- Leadership teams vary greatly in size (4-9 members) based on inclusion of school leaders for some CMOs, with each member contributing a discrete area of expertise
- CEOs seek out and hire senior team leaders who are highly-effective (proven track record) in their area (finance, academics, etc.), highly-aligned in philosophy and mission, driven by results, and able to work independently
- CEOs are reflective about their own strengths/weaknesses and humble enough to hire senior team leaders who have expertise that complements their own skills
- Continued improvement needed to diversify senior leadership teams, particularly related to race and gender

CEO must spike in maintaining excellence “bar”, facilitating team management, and driving organization vision

CEO then intentionally constructs leadership team that possesses full range of functional and strategic skills to drive organization success

Team management

- CEOs build a high-functioning senior leadership team where trust is the foundation and shared accountability is present
- CEOs ensure senior team leaders have role clarity and understand the strengths they bring to complement the team
- Senior team leaders have autonomy to lead their teams; CEO provides support to ensure functional area teams run smoothly and drive toward organization vision and expected outcomes

Senior leadership team: management

- Strong CEOs develop highly-effective senior leadership team members through a strong team culture, role clarity for each team member, and support leading and managing their own functional teams

CEO Focus	CEO Actions
Build high-functioning senior leadership team with mutual trust and shared accountability	<ul style="list-style-type: none"> • Annual senior leadership team retreat to recommit to team as “first team” and align on ownership of strategic priorities • Reinforces team norms at all meetings and builds time in to reflect on how well the team is living the norms • To reinforce accountability, action ownership and follow-up are part of every team meeting/check-in • Bi-annual senior leadership team “step backs” to reflect on priority progress and team culture health
Ensure role clarity for all senior leadership team members	<ul style="list-style-type: none"> • Uses annual retreat and “step backs” to ensure role clarity for all senior team leaders, especially for organization priorities where multiple functional areas are responsible for outcomes • Reinforces role clarity and prioritized actions for each team member during individual check-ins
Supports individual senior leadership team members in managing their functional team	<ul style="list-style-type: none"> • In individual team member check-ins, consistent topics include functional team progress towards goals and individual team member development efforts • Commits time periodically observing senior team member run a team functional team meeting or conduct a check-in

Appendix

We focused our study on CEOs of small-to-medium CMOs and included NOLA leaders and national CEO benchmarks

NOLA CMOs

Five CEOs were selected based on the success of their CMOs, tenure in the role, and size of the organization. The size of the CMOs ranged from three to nine schools. Experience of CEOs ranged from six to twelve years in the role of CEO.

National Benchmark CMOs

Three CEOs were selected from cities/states outside of New Orleans to provide insight on transition into the role, leading a vulnerable organization, and/or leading through growth. These organizations also serve a similar demographic of student as served in NOLA. The size of these CMOs ranged from four to nine schools. Experiences of the CEOs ranged from three to ten years in the role of CEO.

Stakeholder engagement: differentiated approaches (1 of 2)

Stakeholder	
Board	<ul style="list-style-type: none">● The CEO should recognize that the organization is best served when the Board plays an active and appropriate oversight role● To invest members and increase accountability to the Board, CEOs develop committee structures to leverage member expertise in key operational areas● Succession planning is an important and often overlooked function of the Board and CEO to ensure sustainability of the CMO
Parents/ Guardians	<ul style="list-style-type: none">● CEOs primarily rely on school leaders to drive engagement with families of students at each school● The CEO ensures that school leaders are appropriately prioritizing family engagement and have the resources necessary to do it well
Funders	<ul style="list-style-type: none">● Unlike cities with smaller charter sectors where local philanthropy can support many of the CMOs, NOLA CEOs must turn to national philanthropy for support● A NOLA CEO must be able to clearly articulate a passionate belief in why they do the work, and demonstrate results, in order to successfully compete for national funding

Stakeholder engagement: differentiated approaches (2 of 2)

Stakeholder	
OPSB	<ul style="list-style-type: none">• With the recent unification of schools under OPSB, it has become more important than ever for NOLA CEOs to cultivate positive relationships with OPSB staff, attend OPSB meetings and functions, and ensure that their voices are heard on district policies
Other CMO leaders	<ul style="list-style-type: none">• In NOLA’s all-charter landscape, effective CEOs align with other CMO leaders to advocate for mutually beneficial policies, rather than isolating themselves• Other CEOs can also be an important resource to share practices, coordinate recruiting and hiring efforts, and even collaborate on PD opportunities
NOLA community	<ul style="list-style-type: none">• In a choice-driven environment, it is helpful for a CMO’s name to be known and respected in the broader community. Furthermore, high school affiliation is an important aspect of identity for many in NOLA, and alumni can be influential supporters or detractors• Although CEOs may focus less on community engagement in their initial years, over time they should increasingly invest in participating in and hosting community events

Competency shifts from principal to experienced CEO (1 of 2)

Competency/ Role	Principal	New CEO	Experienced CEO
Set the Direction	<ul style="list-style-type: none"> Aligns school's strategic priorities to the organization's vision Manages priority execution across school Drives organization core values through school culture 	<ul style="list-style-type: none"> Establishes and/or refines organization's vision/TOA; must be able to align all functional area work accordingly Heavy focus on building/maintaining organization culture across home office and schools 	<ul style="list-style-type: none"> Primarily ensures that organization systems and structures continue to align to established vision/TOA; supports other senior leaders to drive progress across functional areas Continues to focus on maintaining desired organizational culture across home and schools
Maximize Talent	<ul style="list-style-type: none"> Directly responsible for development and retention of school team 	<ul style="list-style-type: none"> Focus shifts to selection and development of high-functioning senior leadership team Support senior leaders in selecting and developing effective functional area teams 	<ul style="list-style-type: none"> Consistent focus maintaining cohesion of senior leadership team Continue development of senior leadership ability to manage strong team outcomes
Manage the Organization	<ul style="list-style-type: none"> Responsible for school operations with support from organization central office Utilizes central office staff to supplement gaps in operational expertise (finance, operations) 	<ul style="list-style-type: none"> General content expertise necessary across all organization functional areas Supports functional area performance through dynamic management skills versus deep content expertise 	<ul style="list-style-type: none"> Primary focus on senior leader management and appropriate alignment of resources based on strategic priorities and TOA

Competency shifts from principal to experienced CEO (2 of 2)

Competency/ Role	Principal	New CEO	Experienced CEO
Engage Stakeholders	<ul style="list-style-type: none"> ● Heavy focus on communication with school staff, students, and families; some upward communication with network team ● Community engagement focused on support for specific school initiatives 	<ul style="list-style-type: none"> ● Initial focus on internal communication as CEO builds relationships across organization and shares strategic vision/TOA for the organization moving forward ● Intentional and focused external relations efforts, building relationships and ensuring key community stakeholders understand strategic vision/TOA for organization moving forward 	<ul style="list-style-type: none"> ● Internal organization communication is more focused and less frequent; other senior leaders drive more internal communication ● Increased commitment to external engagement; this can take the form of attendance at city and state-wide education meetings, alliance-building meetings across the city, and national convenings
Drive to Results	<ul style="list-style-type: none"> ● Singular focus on school outcomes, with performance targets often set at the organization level ● Directly responsible for managing progress towards goals through school leadership team 	<ul style="list-style-type: none"> ● Continued personal focus on direct school-level performance ● Hire and/or develop CAO/CSO to maintain intense focus on school performance ● Shift focus to strengthening program, finance, and operation execution 	<ul style="list-style-type: none"> ● Develops organization dashboard to keep pulse on progress towards annual goals ● Leverages dashboard to drive to results through effective management of organization and/or school leaders