

**MPR**

Associates, Inc.

# HOUSTON A+ CHALLENGE: AN ORGANIZATIONAL REVIEW

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April 2008

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# Executive Summary

The purpose of this organizational review, undertaken by MPR Associates, Inc. at the request of Houston A+ Challenge (HA+C), is to enable the organization to take stock of its contribution to school reform in the Houston area after a decade of work and to examine its weaknesses and strengths as it makes plans for the future. To do this, MPR staff visited Houston A+ sites, examined relevant documents, and interviewed staff, Board members, and clients. We found that HA+C:

- Has had a recognized and highly positive effect in the Houston-area education community.
- Is known for being responsive, disseminating research, facilitating networks, and providing learning opportunities for students, teachers and administrators otherwise unavailable to them.
- Operates according to a current mission and imperatives that are overly broad and not aligned.
- Allows its mission to be defined by its activities rather than vice versa.
- Has acquired a large, diverse portfolio of programs and initiatives that can be difficult to sustain.
- Does not have a strong accountability system.
- Does not communicate its purposes or activities well, both internally and externally.

To address these issues and position the organization for the future, we suggest that HA+C:

- Redefine its mission and focus to reflect its priorities clearly.
- Develop a strong accountability system and a “culture of evidence” among staff and Board.
- Implement a regular strategic planning process, including the use of accountability data, for making funding and programmatic decisions.
- Consider documenting its work, planning to scale-up successful efforts, and terminating unsuccessful ones or those not congruent with the redefined mission.

- Develop a plan to communicate its redefined mission and priorities to staff, Board, clients, funders, and the community at large.
- Examine the skills and expertise needed by staff and Board members as the organization moves ahead.

# Introduction

In March 2007, Houston A+ Challenge (HA+C) asked MPR Associates (MPR) to help assess its “value added” to the progress of school reform in the Houston area. MPR reviewed relevant documents and background literature, conducted interviews, and submitted a preliminary analysis in April 2007, which confirmed our initial sense that HA+C needed a strong accountability system to support strategic planning and decision making. A comprehensive and coherent system of accountability could:

- Provide evidence of success for HA+C as a whole and its programs and sponsored initiatives;
- Become the basis for making strategic decisions to advance the organization, and
- Identify ways to sustain the HA+C core mission.

Information from such a system could also be invaluable in telling the story of HA+C’s work and further establishing the organization as a preeminent educational reform support agency in the Houston area.

At the request of HA+C, MPR offered detailed proposals in May 2007 for evaluating 1) the organization, 2) the middle school math initiative, and 3) the leadership academy. MPR was asked to conduct the first two studies. This report describes only the organizational review; the evaluation of the math initiative will be submitted separately. Building on our preliminary analysis, we reviewed additional documents and data and collected more information from clients, participants, staff, and Board members, to assess the overall functioning of HA+C and one of its specific programs. Our objective was to create an evidence base for future initiatives and program decisions. Information about the methods used to conduct this review is available in the Appendix.

## Content of the Report

We developed this report by analyzing the data we gathered for themes and patterns and by conducting debriefing discussions with all research team members. Our purpose was not to undertake a comprehensive evaluation of all HA+C’s work, but rather to review its operation as a reform support organization—an intermediary—as it was established through the original Annenberg Challenge grant. We have

organized our findings by specific themes emerging from the data, and we offer recommendations for moving the organization forward. The discussion that follows focuses on the following topics:

- HA+C's positive impact
- Organizational mission and scope of work
- Strategic decision making
- HA+C's portfolio of programs and initiatives
- Research and accountability
- Funding and financial structure
- Sustaining programs and their impact
- Maintaining quality control
- Communication
- The staff and Board of Directors

## HA+C's Positive Impact

HA+C clearly has had a strong positive effect on the Houston-area educational community, according to abundant evidence. In one interview, a principal noted: “[They] helped me professionally to have critical conversations in a non-threatening way; they helped me with discussing challenges we face and presented me with literature that was useful. I purchased books for my staff to do readings together. They provide professional development opportunities that [otherwise] I wouldn’t have been involved in.” Principals and teachers alike offered specific examples of how working with HA+ C had enhanced their professional lives, as in this comment from a teacher: “[We] can see beyond HISD to what’s happening regionally and beyond. We are expected to read, to develop nationwide awareness—what’s going on in the reform world. A+ encourages the collaboration at all levels—as a teacher I didn’t see beyond the classroom. In my network, we see principals and assistant principals and regional leaders and learn from all of them. Every retreat has been well planned with opportunities to reflect on our own practices.”

HA+C is recognized in the Houston area for being responsive, making cutting-edge research available, facilitating networking and educational conversations at many levels, and providing learning opportunities for students, teachers, and administrators that they otherwise would not have had. Our interviews with participants in a range of HA+C-sponsored activities were overwhelmingly positive and laced with many examples of HA+C’s influence on their professional lives, their school, and district practices. The examples that follow are based on comments made by those interviews in discussing a variety of programs in which they participated. The examples reflect the fact that the programs share a theoretical approach that involves asking hard questions, finding ways to discuss and explore solutions to problems with peers within and across districts, and staying abreast of current research on promising educational reform strategies.

- A principal who is a strong proponent of data-based decision-making expressed his appreciation for learning about a Critical Friends protocol that enabled him to discuss the importance of using data and ways to do so with his faculty in a new way. Without this strategy, he would have approached this discussion in a much more top-down manner.

- A teacher involved in the Critical Friends Group training discussed how she applied what she learned in the process to providing instruction in her classroom. She used what she learned to redesign her entire classroom approach—integrating team-building activities and many more interaction and questioning strategies—making her a much better teacher. “I want to be a ‘light’ in the district,” she noted. She also emphasized that the work had given her an opportunity to work with people all over the country, something that wouldn’t have happened without HA+C.
- A district administrator currently serving as an interim assistant principal said that the opportunity she now has to be in a school allowed her to see more clearly “how the idea (being a reflective practitioner) works.” She noted that it (the process of facilitating discussions and helping teachers to be reflective) was very powerful because at times “our thinking was changed by the messages” and that the (reflective) tools provided helped her to prioritize and “think about what tools are applicable for the school where I’m working.”
- Finally, a high school teacher who teaches radio/television communications and who participated in an externship conducted interviews with some executives at the company where she was placed. She asked about the skills they seek in new hires, problems they encounter with new employees, and what they wish the schools were teaching students that would be applicable in that workplace. This career technical education teacher said she came away with valuable information about what employers are looking for and what they need, and she learned that students are not able to think critically. Company staff confirmed that new hires often do not have strong creative thinking skills, which are very valuable to an employer. In her classroom, this teacher used what she learned during her externship to push her students to think creatively and to find answers themselves, rather than simply repeat what they are told.

These positive effects of participation in HA+C activities were particularly profound for experiences that were long-term and involved a network of participants or ongoing support: Critical Friends Group, Leadership Academy, externships, literacy initiative. There were, however, also many positive reactions to one-time events that brought educational experts to Houston or encouraged sharing expertise at conferences. Participants rated their experiences with HA+C very high for quality and professionalism, and the examples offered in interviews provide strong evidence that many have applied what they have learned in their classrooms, schools, and districts. Overall, the broad array and quality of HA+C programs have established it as an important school reform agency in the Houston area.

***Abundant positive evidence from HA+C clients confirms a significant accomplishment: establishing itself as a respected school reform organization in an urban environment, with a continuing and growing client base and a history of solid funding.***

We interviewed only individuals involved in one or more HA+C activities. Several mentioned that they were often surprised, when describing their activities to their peers, that many did not know anything about the organization. We also found that some interviewees did not know about HA+C programs other than those in which they were involved. These observations are directly related to the theme of communication, as described in one of the sections below. The sections each discuss themes that we consider significant as HA+C maps its

future. In each case, we have highlighted specific findings and recommendations for ways to address the issues identified.



## Organizational Mission and Scope of Work

The HA+C website currently states its mission as:

To promote an academically rich and purposeful education for more of our children, and to demonstrate how such an education could become possible for all our children. We do this by investing in people, through initiatives that coach teachers and school leaders to acquire the skills they need to help students of diverse backgrounds succeed academically, professionally and socially.

HA+C specifies three roles for itself: 1) catalyst, 2) steward of funds, and 3) prompter of accountability. It has also operated on three “imperatives” since its beginning: personalization, collaboration, and quality learning. This loose configuration of beliefs has guided HA+C decisions about which activities or initiatives to support. Part of HA+C’s success has been its flexibility as an intermediary and its responsiveness to both funders wanting to support improvements in Houston-area schools and educators needing resources.

HA+C’s establishment as an intermediary through which to channel funds and meet the Annenberg challenge and to carry out the vision of the multiple organizations in the Child-Centered Schools Initiative may explain why it is not governed by a clear, focused mission. Now, however, after ten years and numerous projects and programs, this historical “soft focus” makes it difficult to articulate HA+C’s central purpose clearly. This is a common challenge for intermediary reform support organizations.<sup>1</sup> But now that much of the work of the original Annenberg Challenge has ended and to continue its work in Houston on a similar scale, HA+C must find new resources, most likely from a wider variety of funders. The lack of a clearly articulated mission—and accomplishments—may make it more difficult for HA+C to secure its funding base into the future.

The organization’s imperatives and mission statement are not truly aligned, and neither the mission statement nor the imperatives effectively captures what HA+C actually does. The label “imperatives” implies that any investment of the organization’s resources must fall within the scope of these activities. Although it is easy to see how most ongoing programs address one or more of the imperatives (e.g.,

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<sup>1</sup> Honig, M., *The New Middle Management: Intermediary Organizations in Education Policy Implementation* (August, 2003).

Critical Friends training fosters the creation of school cultures committed to collaboration), the connection between the imperatives and the purpose is tenuous, and a clear rationale is lacking. Why is it important to promote academic richness? Why demonstrate that such an education is possible? How will focusing on the three imperatives promote these purposes and to what desired end?

Rather than a mandate that helps HA+C set priorities, the imperatives are vague enough to justify the inclusion of a variety of initiatives. The mission statement, then, is derived from HA+C's activities, rather than serving as a clear statement of purpose and guide to how the organization should work. This makes it difficult to determine how to scale-up and sustain programs and initiatives and create a financial structure to fortify the work. It also makes it difficult to convey the essence of the work to potential funders and demonstrate the organization's impact to those in and outside of the education field.

***Rather than operating from a clearly articulated mission that determines the goals and work of the organization, HA+C has allowed external factors to determine its programs and activities.***

It can be advantageous for an emerging reform organization to have a broad mission and flexible scope, because this allows a wide variety of clients to benefit from its services and helps to establish its presence in the reform arena. For HA+C, however, the consequence of this flexibility has been less clarity of purpose. With so much on its agenda—individual teacher professional development, leadership networks, school-level curriculum initiatives, high-school reform—even those most intimately involved can lose

sight of the mission. This was clear from the majority of our interviews. Staff members knew their particular projects, but had lost sight of an overall purpose and reverted most frequently to the “imperatives.” Board members made fun of their own inability to “give the elevator speech,” and program participants’ concept of HA+C’s overarching purpose was limited to the program(s) in which they were involved.

As HA+C’s website notes, it invests “in people, rather than programs, by providing teachers, principals and administrators with resources, support and coaching to improve classroom and district practices.” Measuring and demonstrating the impact of such work on students is challenging. Even when respondents stated that the ultimate purpose of the organization was student-centered, they often answered the question “What about HA+C programs has been most valuable?” by referring to

changes in how teachers and/or administrators learn or interact with one another. This shows that the connection between HA+C's work and improved academic opportunities for Houston-area children is obscured. The organization invests in a wide variety of activities, but at present has no way to determine which activities are most worthwhile.

HA+C leadership confirmed that they saw a problem with "scope creep," but the alternative that some cited, narrowing the focus to leadership, could also be problematic. Among a number of problems one could cite, it could leave many clients with unfulfilled expectations regarding programs in which they have participated or funds they have received. It could also mean that some willing funders find no program or initiative to support that reflects their interest areas.

Program participants indicated that many see HA+C as a valuable resource for helping to launch reform efforts, supporting good instructional programs that may be undervalued in a high-stakes accountability policy environment and offering

meaningful professional development opportunities. HA+C leadership will need to take these values into consideration as it develops more effective decision-making processes and effective impact measures of its impact that will help to clarify its mission and scope.

***HA+C should more clearly define its vision, mission, and focus, but the transition should be strategic, rather than reactive.***

## Summary Points and Recommendations

- HA+C's broad mission statement and imperatives have enabled it to establish a presence and wide visibility in the Houston area. The lack of focus in its mission statement, however, has led to a scattered portfolio of programs reflecting an organization without a clear purpose.
- The mission statement is derived from HA+C's activities, rather than serving as an *a priori* guide to the organization's purpose and work.
- HA+C should craft a clear, concise mission statement specifying its purpose, to guide strategic planning and enable the organization to be more deliberate in its work.

## Strategic Decision Making

Because HA+C's mission is so broad, almost anything called "school reform" could be undertaken. As noted by a staff member, "The mission is very broad—we're going to save the world." This imprecision in HA+C's purpose has resulted in a scattered decision-making process. HA+C should refine its mission to give it a focused purpose.

It appears that program decisions have not been based on a careful examination of the trade-offs involved—a consideration of risk and return for specific options. In many cases, available funding drives the choices that are made. As one interviewee said, "We have allowed the money to drive what we do." In other cases, HA+C has sought funds to initiate or expand a program considered worthwhile. Because some of the funds obtained carry more restrictions than others, unrestricted funds are tapped whenever necessary to meet a need for which there is no other support. There are significant costs—and consequences—associated with operating in this way. Simply stated, it appears that decision making at HA+C has not been strategic. Strategic planning adds important elements to decision making. It allows goals to be set independent of external forces and provides a standard of measurement. It also converts values into action, and it allows limited resources to be committed in an orderly way. Many organizational experts recommend using organized strategies for making decisions. They believe that prudent analysis is the key to making good decisions, and that many decisions are made with too little information and too little thought. There are numerous tools for engaging in strategic or tactical decision-making<sup>2</sup>. These approaches are designed to compensate for the fact that people often believe they know the pluses and minuses of a decision before making it, but in actual practice, they make decisions before considering the evidence in an orderly way. Only after the decision is made do they seek evidence to support it. Deliberately and carefully considering the evidence on both (or all) sides before making a decision can have a major impact on the quality of those decisions.

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<sup>2</sup> These have been as simple as pro/con T-charts or Edward De Bono's PMI (plus/minus/interesting) process (<http://www.debonothinkingsystems.com/home.htm>) for analyzing options.

**FIGURE 1. EXECUTIVE DECISION MAKING SCREEN FOR NEW OPPORTUNITIES OR NEW INITIATIVES**

1. Alignment: is it true to the agency's mission? Is it consistent with and will it help us advance our strategic priorities?
2. Is the issue it will address really important? Is the activity or opportunity exciting?
3. In what ways could the work add value to K-12 practice or policy? In what ways can agency assets add value to the work?
4. If it involves a partnership or collaboration, what are the pros and cons of this relationship? Is it likely to add value to our work and reputation and not undermine it?
5. Does the activity come with funding? How much? Can we use it to obtain funding? From whom? How easily? Does the advantage of the opportunity outweigh the financial or time costs of taking it?
6. Does the initiative put us into the political fray? Do we know enough about the politics to be able to handle ourselves competently?
7. Does the funding source or partnership allow us to maintain our reputation for independence and impartiality? Can we anticipate and mitigate any challenges to these?
8. Do we have the staff time to take on the work? Which staff will be impacted, and at what time of year?
9. Does our staff have the skills, expertise, project management, and good judgment to take this new initiative on and execute it with high quality? How could the board or consultants help?
10. Can the project complement other agency services/activities? Can it help meet other agency obligations and interests, generate visibility?
11. Can we execute this project well while maintaining credibility with our constituents, colleagues, and the board of directors? Is the value we might add by undertaking this initiative worth any strain and challenge it might bring?

Source: EdSource,  
Mountain View, CA

The first step in these strategic decision-making processes is a well-defined mission. (Figure 1 is an example of a tool used by an organization to make decisions about research topics on which to focus.)

HA+C has many significant accomplishments to its credit. It has served as a catalyst for important discussions about education, and it has “planted enough seeds to change the way schools are run”—how they make decisions, plan instruction, use data, and solve problems. At present, however, HA+C does not have an organizational “culture of evidence” to support strategic decision making, a process that would enable HA+C to advance initiatives likely to have the most impact and sustain and scale-up important changes in schools and districts.

It is also unclear just who makes decisions and how decisions are made. Who participates in decisions? What is the basis for making choices and setting priorities? When should the executive director and staff make decisions? When should consensus be sought among key stakeholders? How should the Board be involved in decision making about programs or projects? Some research on strategic decision-making<sup>3</sup> indicates that a decision isn't necessarily a

<sup>3</sup> Nichols, F.W., *Strategic Decision Making: Commitment to Strategic Action* (Distance Consulting, 2005).

*choice* among alternatives, but it is always a *commitment* to a particular course of action. Whether reached through bargaining or consensus or rounds of critique, a commitment must be made and then managed and supported. Finally, it must be communicated—clearly, coherently, and convincingly.

## Summary Points and Recommendations

- HA+C has been driven largely by external forces: funders, school/district requests, school reform trends.
- HA+C has no apparent process for examining the trade-offs in decisions, and it is unclear who participates in decision-making about program initiatives and how decisions and their rationales are communicated.
- After ten years of work and with new staff leadership, HA+C is well positioned to adopt
- a strategic-planning process to redefine its mission and develop decision-making and accountability procedures to guide its future work.
- HA+C should develop or adopt a set of tools for establishing a clear process for making program decisions guided by a revitalized mission statement.

## HA+C's Portfolio of Programs and Initiatives

HA+C has a large portfolio of programs and initiatives that reach a diverse constituency of students, teachers, administrators, and community members in the Houston area. Although HA+C program participants value the range of HA+C program offerings, supporting such an array of programs has posed problems for HA+C as an organization.

The size and complexity of the HA+C portfolio appears to be the result of an organic and opportunistic approach to supporting school reform. One of HA+C's strengths has been its responsiveness to the needs of those it serves, but that very responsiveness has resulted in an accumulation of projects and programs over a decade that are not necessarily the most targeted or relevant activities in the current reform context. HA+C's broad mission has further encouraged the spread of its portfolio.

Another potential reason for this ever-expanding portfolio is the lack of an "exit strategy" for HA+C programs. Identifying the conditions or events that should trigger a re-evaluation of a program's utility or efficacy—and perhaps its termination—is crucial to building a strong, lasting reform support organization. Without such a process, the decision to continue an initiative is left solely in the hands of the project's funder.

One consequence of HA+C's broad portfolio is that the philanthropic organizations supporting HA+C work may view the organization as willing to take on almost any project. If HA+C has embraced the many and varied opportunities presented by funders, those funders may have developed the perception that they can ask HA+C to fill almost any role in Houston school reform. They are interested in helping to improve education, and HA+C seems to meet their need for a good and fair steward of their funds. Whether this perception of HA+C's role is accurate or not, HA+C and its funders would both benefit from a clearer picture of the organization's goals and strengths. HA+C should craft its mission to convey its priorities to prospective funders, and those priorities should then be reflected in its portfolio of work. Thoughtfully choosing and supporting the most effective, relevant HA+C initiatives, weeding out those that are not the best use of HA+C resources, and carefully integrating new work will best serve local students and educators and ensure HA+C's longevity.

As HA+C contemplates its focus and perhaps considers a more limited portfolio, it will be essential to develop a sound approach to dealing with initiatives that it may no longer support. The apparent popularity of HA+C programs among its clients is a testament to HA+C, but it also can present problems if HA+C decides to move in a different direction.

The Regional High School Reform Network is an apt example of a situation where HA+C should take some care as the initiative comes to a close. There is some evidence of the Network's success and popularity among participants. One participant who was interviewed commended the opportunity that it provided for "sharing and being at work with the neighboring districts—to really focus on certain issues and concerns that we have." She appreciated using the protocols to "speak and voice what we've learned." In particular, this and other interviewees acknowledged the value of developing a portfolio at the end of the five-year term: "We knew we had to do it; at first it seemed like pieces of paper in a binder, but what's come out of it has been a great product for us on the campus...it's not just something to turn in; we will continue with it so that the community can see what we are about—not just TAKS scores and what the newspaper says about us—now we will use it to show A+, the school board, and the community what we're about." Respondents frequently cited the portfolio product as one of the most valuable outcomes of their participation, because it was a clear demonstration to parents and the community of what is being accomplished at their school.

As HA+C shifts away from this area of work, the successes and challenges should be documented as thoroughly as possible so that others can learn from the endeavor and where productive or useful strategies or models were developed, they can be developed and expanded in other schools. In general, there has not been a concerted effort to make the best use of the lessons that have been learned, to scale up successful models. The education field at large, as well as HA+C as an organization, will benefit from such analysis now and in the future. This kind of careful approach to winding down the program may also help minimize disappointment or resentment among its supporters.

MPR's assessment of HA+C operations includes helping the organization move into the next stage of its development, positioning it most effectively to serve Houston-area schools. HA+C has recently identified leadership as a focal concept for future work. Understanding the implications of a decision to define HA+C in this way will be crucial to the organization's future success. What does it mean for HA+C to focus on leadership? How will this narrower scope of work affect existing programs that do not fall under the umbrella of leadership? How does this new direction affect clients and funders who view HA+C as a provider of services outside this scope of work?



What will change in day-to-day operations for each staff member? Articulating a new direction is only the first step in redefining HA+C's work; next comes the hard work of envisioning the resulting changes at every level of the organization.

One fundamental aspect of redefining HA+C will be addressing the tension between being a nimble, responsive reform support organization and providing consistently high-quality programs. Program quality ultimately flows from the quality and skills of HA+C staff. Ensuring that staff have the capacity to meet new program imperatives as HA+C matures will be critically important.

## Summary Points and Recommendations

- Program participants value the range of HA+C offerings, but supporting such a wide array of activities poses problems for HA+C as an organization.
- Philanthropic organizations that support HA+C work may have developed the perception that the organization will take on almost any education reform work.
- HA+C's portfolio of programs and initiatives is so broad that many supporters are unaware of all that the organization does and of programs that could benefit them or their colleagues.
- There has been little effort to capitalize on lessons learned: to scale-up successful models, communicate successful strategies, or transfer responsibility to sustain successful models or strategies.
- HA+C's leadership should examine the organization's current portfolio of work in a systematic and strategic manner and concurrent with a clarification of the organization's mission.
- A facilitator who can guide the process of redefining the mission may be helpful, but this should be someone who can keep the process relatively simple and straightforward.
- HA+C should establish a procedure for capitalizing on lessons learned from each project and creating an exit strategy for each project that is based on more than just the termination of funding.

## Research and Accountability

MPR's examination of HA+C's programmatic work and internal operations shows that outcome data gathered over the past ten years are not adequate to the organization's current needs. HA+C staff are aware of the need to adopt more rigorous evaluation practices, but the organization may lack some of the necessary expertise to do so. Each HA+C program does not need the same level of evaluative rigor; but at the inception of each program, staff should consider the level and type of evaluation that will be appropriate and useful. HA+C needs to know what works, what doesn't work, what should be supported in the future based on program efficacy, and what programs should be let go, either because they have been ineffective or because they lie outside HA+C's mission.

Some efforts to collect outcome data about HA+C programs are in evidence. Methods for measuring program success include counting the number of participants at HA+C events, satisfaction surveys for program attendees, and post-event discussions with partners about whether they successfully promoted the desired reform. HA+C staff have also kept observation logs during school visits and compared pre/post data for teachers participating in coaching groups. These data collection approaches give some sense of HA+C's impact, but they do not permit rigorous and systematic analysis of the effects of the organization's work.

The original funding documents for the Annenberg Challenge for Beacon and Lamplighter Schools provide an example of what may have been the strongest evaluation effort found at HA+C. There was substantial support for evaluation. There was some evidence that the programs had positive effects on student achievement, but our review of the methods and results raised many unanswered questions. Based on information we collected, it seems likely that these evaluation results were not used to make strategic decisions about whether there should be continuing support for the Beacon and Lamplighter Schools or whether the models were curtailed prematurely. The first step in building a strong accountability system is identifying appropriate outcome measures, and the second is the use of proper methods. An important final step—one that needs careful guidance—is the interpretation and use of the resulting data.

The High Schools for a New Society (HSNS) program and the related Regional High School Reform Network (RHSRN) are more in-depth examples of the

shortcomings of current efforts by HA+C to evaluate the impact of its work. Since the second year of its implementation, an external consulting team, researchers from the University of Texas, Austin, have evaluated the HSNS high school reform initiative. Meaningful, systematic analysis of this program's success has been challenging. Some circumstances beyond the control of HA+C and the external evaluation team have impeded rigorous analysis of student outcomes. But the ongoing annual HSNS evaluation has been valuable as a strategic planning tool and represents a sustained effort to document changes resulting from HA+C investment.

The Regional High School Reform Network, however, intended to scale-up the HSNS program to school districts surrounding HISD, has not had an external evaluation. HA+C never budgeted resources for an external evaluation of the RHSRN program, so there is no systematic documentation of the implementation process and outcome measures over the course of the initiative. While our review of evidence related to HA+C's work in high school reform indicates that the organization has developed a specific approach to the work, and there have been pockets of success, the organization has not developed a consistent record of implementation, and very little evidence exists to corroborate or refute the validity of their approach. As a result, HA+C cannot use the results of this program to inform the field about the value of the approach or guide its own future investments.

As HA+C moves toward a more focused mission and portfolio of programs, it will be critical to the organization's success to initiate a clear, comprehensive system of accountability as a decision-making tool. Such a system will allow the organization to see where it currently stands and to gauge the value of its future work. Building a "culture of evidence" within the organization, which promotes the use of data as the guide for all decisions, will allow the organization regularly to revisit its mission and scope of work.

However HA+C decides to design a comprehensive accountability system, it will benefit from creating a structured strategic decision-making process. The process of designing and implementing a system of accountability at HA+C will highlight an existing tension within the organization. HA+C has operated as an organization that is flexible and responsive to the needs and desires of clients and funders, but the introduction of a rigorous accountability system will necessarily reduce some of that flexibility. Tension may develop around how HA+C staff, clients, and funders understand the organization's identity. Some may feel that it is abandoning its roots, while others may be more prepared to embrace a culture of evidence. Attention should be paid to how this tension manifests itself, so that concerns of stakeholders can be addressed as they emerge.

## Summary Points and Recommendations

- The lack of a strong accountability system is arguably the greatest weakness in HA+C's operations. While there have been serious attempts to collect information about program results, they have often either been short-sighted or misdirected. In addition, many staff and Board members said that they were unaware or unclear about program evaluation results.
- HA+C staff have collected feedback data consistently that have led to changes in format or content of programs, but there are almost no strong impact data that can be used to make strategic decisions.
- HA+C must build its capacity to plan and carry out systematic evaluations and operate under an overall accountability system. This may mean adding a staff member to direct the effort or hiring staff with some evaluation expertise. The development of an accountability plan and internal evaluation capacity could also be done by an outside firm.
- One or more specific HA+C projects or programs could be used as object lessons for developing clear accountability procedures.

## Funding and Financial Structure

A well-functioning non-profit operates with sound financial practices and sufficient and suitable funding to run its programs and organization. Funding aligns with organizational mission and goals, and as the organization develops, its leadership adjusts funding strategies to adapt to changing goals, priorities, and circumstances. In general, HA+ C has been in good financial standing, with sufficient funds available, a strong operating reserve, impressively low administrative costs, and a large percentage of unrestricted funds that allow flexibility in decision-making. Improvements in financial practices can support the larger goals of the organization. A regular strategic review of its finances deserves attention as the organization matures. For example, the Board and executive staff might consider the amount of reserves kept, the balance of income types (public, private, interest, and earned income funding), and guidelines for how unrestricted funds are spent.

Our review of documents indicates that HA+ C has been in the enviable position of having both breadth and depth of funding. More than 20 different organizations provide funds and one, the Annenberg Foundation, has supplied significant funding since HA+C's inception, including \$4 million yearly over the past four years, supporting the bulk of program and overhead costs. However, HA+C should prepare for the changes likely to occur without the support, both financial and otherwise, of a keystone funder. Will clients' interest in working with HA+C change if associated grants are no longer offered to them? How will programs in progress be sustained? It may also be necessary to replace this key support with multiple funders offering smaller contributions. What kind of attention and stewardship would these foundations need to feel confident in making larger contributions later? How can they best be exposed to program successes? How can HA+C increase public funding or earned income to balance private foundation support? What are the program exit strategies if sufficient support cannot be found to supplant the Annenberg funding? Answers to these questions can help provide stability for the organization if a source of support is withdrawn.

A balance of funds is important, but ensuring that funding supports the goals and mission of the organization is equally important. Staff and Board interviews indicated that restricted funds—those dedicated to particular programs—are sometimes accepted without considering how a new program will fit with the mission and goals of the organization. Such opportunistic funding can contribute to an unfocused

portfolio. A review of HA+C documents supports this view, showing that the organization has supported programs ranging from infant health to higher education over time. Strategic criteria determining when HA+C will accept restricted funding could help guide these decisions. Criteria might include whether the proposed program aligns with the agency's mission, advances its strategic priorities, adds value to its portfolio, and can be well executed given current staff and expertise within the organization.

HA+C documents also show that a good portion of funding is unrestricted—not earmarked for particular purposes—which permits flexibility in choosing whether to spend funds on particular programs, operations, or grants to schools and districts. This freedom is a luxury, but there is a risk that decisions will be made without overall goals in mind. How does HA+C make choices about the use of unrestricted funds? Making intentional and strategic decisions about unrestricted funds can strengthen the organization.

In addition to operating programs, HA+C is also a grant maker. Of the 24 clients interviewed, approximately two-thirds had received funding from HA+C. According to those clients, HA+C has served effectively in this role. While it was beyond the scope of the interviews to determine if the grants themselves were effective, clients commented on the role of the grant maker in monitoring whether funds are applied as intended. One client described HA+C as having “very typical requirements compared to other granting organizations.” Some praised the flexibility with which the grants were awarded, allowing grantees to change how the grant was used if circumstances changed, for example, using funds for books instead of travel. Grantees received prompt responses to their requests for such changes. Many also found final reporting requirements useful—detailing the use of funds and successes and challenges encountered while implementing programs. Perhaps unsurprisingly, all of the grantees were enthusiastic about the funds, and several emphasized the need for HA+C to continue granting funds to support reform activities.

## Summary Points and Recommendations

- Houston A+ Challenge is an organization with both breadth and depth of funding.
- Houston A+ Challenge has been in good financial standing, with a high percentage of unrestricted funds that permit considerable flexibility in operation.

- In preparation for inevitable changes, HA+C should evaluate the organization's funding structure and systems to ensure that funding supports its priorities and mission.
- Executive staff and Board members should review specific aspects of the financial structure: the amount of reserves, balance of income types, and guidelines for accepting funds and allocating unrestricted funds.
- If grant-making activities continue, the associated accountability requirements should be strengthened.

## Sustaining Programs and Their Impact

To optimize their efforts, effective nonprofits consider how to sustain the impact of their programs generally and practices promoted within those programs specifically. For good programs to be sustained, they either need ongoing funding or a program design that eventually needs little or no funding. For good practices to be sustained, clients need support in implementing new skills in their school or district and in sharing their new practices with others. Ideally, good programs and practices are widely disseminated across as many schools and districts as possible.

HA+C apparently has given some consideration to making its programs sustainable. Staff and Board interviews revealed at least two successes in transferring program responsibilities to others. When HA+ C reduced school staff funding by 50 percent in Houston Schools for a New Society, more than half of the participating schools filled the funding gap so they could retain their School Improvement Facilitators and coaches. In the New Visions Leadership Program, HA+C transitioned program graduates to an alumni group in which participants themselves develop agendas and facilitate meetings.

On the other hand, some staff and Board interviews suggested that some programs, such as the fine arts and dual immersion programs in the Beacon Schools, might have ended prematurely. Some said that when the primary funder ended its support, the program also ended. With more planning, HA+C could sustain good programs after initial funds run out by developing an earned income stream, cultivating other funders before existing grants end, and using unrestricted funds, among other approaches. HA+C could also benefit from systematizing its evaluation of program quality and decisions about whether to expand or sustain programs showing positive results. How can high-quality programs reach the most people? What tools and supports do graduates need to sustain and expand high-quality practices in their schools and districts? What funding is needed to replicate the program in other schools and districts?

Obtaining new funding would likely be easier if HA+C actively promoted its achievements more. Staff and Board members expressed concern that the organization is not making the most of its program successes. As one person put it, “The organization hasn’t taken a strong enough stance to say ‘this is our impact; here’s what’s been accomplished.’” Staff and Board members also felt that reforms



would be more likely to take hold in districts and schools if successes were more widely disseminated.

In considering sustainability of programs, HA+C should gather data showing that programs are worthwhile investments to secure future funding, but it also needs to consider the following:

- How can HA+C continue leveraging additional or new funds to sustain its work for particular programs?
- How can HA+C measure the extent to which its programs have spread their impact more widely to participants' schools and districts?
- How can HA+C measure the extent to which programs have begun operating independent of HA+C funds or human resources?
- What other indicators would be useful?
- What processes should be put in place to monitor these indicators of sustainability?

Client interviews revealed that current programs may not pay attention to how practices are sustained once participants leave the HA+C program. For example, when participants in the Critical Friends Group and teacher externship programs attempted to share what they had learned with peers at their schools, many realized that they were unsure how to transfer what they had learned, especially when faced with resistance to change. One participant said: "I've gone to several things with [HA+C] and my problem is always how to bring it back to my school and share it with other people." Another participant explained:

The meetings were very 'intense'...we had a lot of homework, lengthy agendas at the meetings; we'd have to come back to our school and share our learning. Sometimes there was too much information, and it was hard to figure out how to bring it back to the school.

Given this, HA+C may improve its sustained impact in schools and districts by paying more attention to how program participants bring their skills and knowledge back to their own work environments. As mentioned previously, staff and Board members felt that spreading the word about program successes could support program participants attempting to incorporate new practices into their work environments.

Planning programs with sustainability in mind can also help strengthen the impact of HA+C offerings. For example, keeping districts and schools informed of program

goals and processes may make them more receptive when program graduates try to incorporate what they have learned into their school and district sites. Some clients suggested that collaboration between district and school leaders in implementing the Regional High School Network may have improved the program's quality. Principals likely had a better understanding of their roles and responsibilities in overseeing their budget and the reform work, and district leaders were more committed to the reforms' success. HA+C might investigate this issue further to determine how best to coordinate district and school personnel in future efforts, as well as consider how to encourage public entities to accept funding responsibility once they have seen proven program results.

## Summary Points and Recommendations

- HA+C has had some success in transferring program and funding responsibilities to others (e.g., school districts) and in using strategies to sustain learning (e.g., alumni groups and reunions).
- HA+C should initiate or plan programs with sustainability in mind, interfacing with school districts to ensure that participants returning to their sites do not meet undue resistance.
- HA+C should consider assisting clients in developing their own strategies for sustaining an effort or transferring what they learn to their own schools or districts.
- Before initial funds for a program expire, HA+C should develop an earned income stream, cultivate other funders, and plan for the use of unrestricted funds, among other approaches.
- HA+C should promote its successes and develop plans to scale-up or propagate successful models.

## Maintaining Quality Control

Interviews with Board, staff, and program participants indicated that people associate HA+C with high quality. Respondents often mentioned that program content was powerful (using terms like “powerful,” “sophisticated,” and “cutting-edge”) and that delivery was well executed (“professional”). Some familiar with the organization’s grant management practices said that HA+C organization was a “good steward of funds” and “responsive” to inquiries and change requests. Some mentioned that HA+C is valued in the community as a way to maximize the amount of donor money that gets to school sites for their intended purpose.

These same interviews, however, revealed some tension over how well HA+C could maintain that reputation in the future. Some questions may be directly connected to the organization’s broad scope of work. For example, some expressed concern about opportunities for staff to preserve and enhance their professional knowledge, given how many programs they were responsible for. HA+C also uses a number of external consultants to implement and coordinate some programs, and this can create additional challenges in overseeing quality and knowledge management. Some program participants worried that the quality of some programs may be deteriorating or their potential impact diminishing, as a result of expanding scope or narrowing networks. They feel that not enough new people or schools were participating in HA+C programs, impeding the development of a culture of reform. Some respondents also were concerned that not enough people were participating in follow-up training and, therefore, were losing sight of key principles.

As the organization enters a new era, the quality of what HA+C provides as an intermediary may get more scrutiny from both its donors and program participants. Since the organization’s strong reputation is based in part on the perception that dollars go to schools, not overhead, but overhead costs may go up as more effort is expended to develop resources. HA+C will need to ensure that overhead costs are justifiable, that overhead tasks are done efficiently, and that work clearly aligns with specific purposes and generates measurable results.

To maintain HA+C’s good reputation in the field of school reform, the organization needs to build systems to ensure that quality can be accurately measured and maintained. Quality control has many elements, two of which are people and programs. HA+C should consider the following questions:

1. Do we have the right people doing the right things?
2. Are programs in the field being implemented and replicated faithfully (conforming to the organization's mission and vision) and consistently (across time and place)?

HA+C must make sure it is doing what it does well and that those responsible for maintaining quality are supporting the agreed-upon goals and strategies. One client said that the external consultant facilitating his/her group regularly criticized HA+C to their group. Participant data also revealed several situations in which participant concerns about the quality of a program as implemented by an external consultant were addressed when HA+C staff became more directly involved in the oversight and implementation of the project.

Another program participant mentioned that the opportunity to provide feedback at the end of network meetings was valuable because HA+C apparently listened to concerns and made changes. While collecting participant feedback is a critical aspect of an effective quality-control system, it is unclear if anecdotes such as this are the norm. Our document review showed that HA+C does collect ample participant feedback data, but it was not clear if these data are consistently reviewed or used. It was unclear whether HA+C takes specific steps to address concerns or to follow up with participants to see if the intent to act on what they learned is eventually translated into changes in practices. It seems that current staff workloads preclude systematic use of such practices. Using reliable measurement methods, however, will help HA+C determine what it does best and thereby what should be the scope of its work. Careful measurement can also help maintain program quality and consistency if HA+C's leaders systematically use data to drive their decision making about staff and resource allocation.

## Summary Points and Recommendations

- HA+C's work is consistently seen as high quality.
- Maintaining high quality requires constant monitoring and using feedback and impact data to make course corrections as needed to keep HA+C in line with its mission and to ensure desired outcomes.

## Communication

Across the various groups of respondents we interviewed, we saw a pattern of an inadequate level of communication to convey the mission and scope of the organization as well as strategies for sustaining the work and documenting its accomplishments. One effect of HA+C's large portfolio of work is that clients often indicated that they unfamiliar with HA+C work outside of the programs in which they participated. Most of these clients know that HA+C is involved in many activities, but they did not feel informed about the nature of all of these programs. Several clients felt that knowing more about what HA+C offers would be beneficial, as they could help identify other potential participants. One program participant described her HA+C program as one of the district's "best-kept secrets," and wished that HA+C would do more to promote the program to other educators and the community. A clear, well-publicized menu of HA+C programs would almost certainly lead to broader and more effective dissemination of information about its valuable work for Houston-area schools.

Staff members reflected less than sufficient awareness of how decisions were made about the work the organization would undertake, how the work of various programs should inter-relate, and how to ensure that their work was sustained. Some Board members were not well versed in what HA+C does, and some mentioned that the community was not adequately informed about the work of the organization and, therefore, might not be inclined to support it. It was evident that Board and staff did not interact regularly. Some organizations routinely bring Board and staff together in retreats to plan and strategize. Such efforts can enhance communication, while also promoting synergy and cohesion among those most involved in carrying out HA+C's mission.

## Summary Points and Recommendations

- The organization evidences a lack of effective communication strategies at all levels: between staff and Board and between the organization and its constituents/community.
- HA+C should develop a strong communication plan that outlines specific strategies for ensuring effective communication and a set of topics about which it must communicate effectively.

## The Staff and Board of Directors

As HA+C moves forward and refines its portfolio of work, it should consider the range and level of staff capacity. With a more defined mission and decisions made about HA+C's direction over the next ten years, appropriate staff must be in place—or provided the professional development needed—to carry out the mission. The staff themselves, as well as others interviewed, noted that current staff do not have the necessary content expertise to engage in some HA+C activities if the organization moves in new directions.

HA+C staff generally work hard at their jobs and are good at specific aspects of their particular program responsibilities. They seem to feel successful, but they express misgivings about how their work fits within the scope and direction of the organization and how it can have sustained impact. Some Board members were unclear about what exactly the staff does. What was most frequently heard—even from the staff themselves—was that they act as facilitators or conveners. They are good at bringing people together and facilitating conversations on issues of interest and/or concern. Because they are not content experts, for the most part, however, they are often in situations where they cannot necessarily “lead change.” Using the horse-and-cart analogy, staff seem effective at being the cart, but they may want or need to be the horse more often, to be truly strategic and provide the leadership essential to promoting reform. These staff concerns are related to HA+C's unclear mission and its past unwillingness to be strategic. If an organization's mission and desired outcomes are not specific, it is hard to know what staff knowledge and skills are needed to fulfill that mission.

Successful organizations can define with precision who they are and who is responsible for what—guiding the mission, delivering services, monitoring and collecting data on implementation, finding support for the mission, networking, facilitating, and so on. This often involves difficult decisions that organizations can be reluctant to make. It can also be an opportunity, however, to develop existing capacity or help staff re-tool to take on new responsibilities as the organization moves in new directions.

While HA+C must determine if the capacity and balance among its staff are suited to its mission and goals, attention also should be paid to enhancing the Board's understanding of the organization's work and how each member participates in that

work. Some Board members apparently are deeply involved in HA+C, while others are much less informed and less engaged. This is not unusual for a Board, but efforts should be made to ensure that the Board can support the organization in optimal ways. Boards generally do not want to be inundated with information about program operations, but they should receive sufficient information to allow them to maintain a level of engagement that is comfortable, appropriate, and productive for the organization.

## Summary Points and Recommendations

- HA+C has a committed staff willing to work hard work and establish a strong presence and good reputation for the organization. They are well informed about the operation of schools and districts, and this has enabled them to forge solid connections with their constituents.
- HA+C is likewise fortunate to have a Board of Directors that includes accomplished business persons, educators, and professionals. These individuals have provided invaluable conceptual help, social capital, and fund-raising support. Some are strongly involved in defining the mission of the organization, but others are less engaged and less informed.
- HA+C must define the human capital needed to move the organization in the direction it chooses through strategic planning. The organization must have the right staff to meet its goals.
- HA+C should also review the mix of Board members and, at a minimum, strive to ensure that the Board is as informed and engaged as needed to provide optimum help to the organization.
- HA+C leadership may want to seek information about documented “best practices” for organizational staff and Boards to help the organization consider how it can best conduct its work and fulfill its mission.

## Conclusion

It is certainly clear from this review that Houston A+ Challenge has established a firm presence in the Houston education arena as a strong, responsive organization that is making significant contributions to the improvement of schools and districts. It is known as an organization that provides access to cutting-edge research, affords opportunities for teachers and administrators to participate in high-quality professional development events or networking activities that have resulted in meaningful change in the schools and districts from which participants have come. It has also been a good steward of funds that have been distributed to schools and districts and used to benefit students throughout the Houston area by improving teacher practice, providing learning opportunities outside of schools, building successful models of instruction, and personalizing learning experiences for both students and educational professionals. There is a clearly a great deal of value that they have added to Houston area education.

Houston A+ Challenge now finds itself at a crossroads, and the time is propitious for the organization to address significant operational issues that have been detailed in this report. These issues center around the crafting of a clear, defined mission statement and process of making decisions that are couched in a definitive accountability system that will provide the basis for moving forward. With the elements in place that we have recommended, we have no doubt that Houston A+ Challenge will embark on the next ten years of its journey with the promise of making an even greater contribution to the Houston-area schools and the children within them.



# Appendix

## Methods

MPR began this organizational review by observing the Reforming Schools Summer Institute (RSSI) and training for the new math coaches during the summer of 2007. In early October 2007, six researchers from MPR conducted a week-long site visit to Houston, during which we participated in several events, mostly presentations or work sessions involving visiting expert Michael Fullan. We also participated in a staff meeting, conducted one-on-one interviews with staff and Board members, and reviewed documents and data from the HA+C files. We later analyzed and synthesized these data and conducted additional phone interviews with staff, Board members, and clients.

## Participation in Events

While on site in October, MPR staff participated in several events: three days of the RSSI; two staff meetings and the summer training for the new middle school math coaches; the training for math coaches by Education Development Corporation (EDC); and the initial Critical Friends Group training session for Goose Creek Independent School District. Staff also participated in several sessions led by Michael Fullan: 1) a Speaker-Series session with Leadership Academy members; 2) a meeting with Board members and the Leadership Academy Design Team, and 3) a community session.

## Review of Documents and Data

MPR staff reviewed electronic and paper HA+C files documenting the organization's work over the last ten years, focusing on specific materials related to the organization's predominant and most recent activities and initiatives. We also obtained files from Program Coordinators on both recently completed and current projects. In our on-site review, we examined documents showing 1) the specific work and actions of organization staff and affiliates; 2) the immediate impact of HA+C work (e.g., numbers attending meetings); 3) costs associated with particular activities and initiatives; 4) program participants' response to activities and initiatives; and 5) evidence of program impact. We requested and received additional documents

related to specific initiatives from individual Program Coordinators and additional financial documents from the Finance Director. We examined these documents for further information on the design and management of HA+C work as well as its associated outcomes.

## Interviews with Staff and Board Members

We conducted interviews of approximately one hour with all HA+C staff members and Board members. A semi-structured interview protocol was developed and used, and interviews also were digitally recorded for use in clarifying notes. We examined data from these interviews for patterns, themes, and useful recommendations, and then we synthesized data from interviews according to themes that emerged from a series of debriefing discussions among research staff.

Respondents	Number
<b>HA+C Staff</b> Michele Pola (former Director) Scott Van Beck (current Director) Suzanne Sutherland Tim Martindell Catherine Reed Alejandro Morua Mike Webster Brandi Allen Angela Prince	9
<b>HA+C Board Members</b> Susan Bischoff Jonathan Day Ann Friedman Joe Foster Roberto Gonzalez Harry Reasoner J. Victor Samuels Andrea White	8
<b>Participants/Clients</b>	24

## Phone Interviews with Participants/Clients

To learn about the response of program participants or clients to the work of HA+C, we obtained lists of participants in the various programs sponsored by HA+C. We

sorted participants by district, role, and program areas (e.g., leadership, teaching and learning, community, and high schools) in which they participated. We then selected all who had participated in multiple programs and added to them a proportional sample of participants representing the different program areas and school districts. From these, we randomly selected a sample of 36 to contact for interviews, with a goal of conducting 24. Using a semi-structured protocol, we conducted approximately 30-minute telephone interviews with these individuals, asking them about their experiences with HA+C (e.g., their perception of their mission, reactions to events or initiatives in which they participated, and the impact of their participation on their work.) We also asked if they had suggestions or recommendations for the organization as it moves forward.

## Interview Protocols

## **Houston A+ Challenge**

### **Questions for Board members:**

1. How long have you been a Board member?
  2. How did you come to be involved with the Board?
  3. What do you see as the contribution you can make? (i.e., why did you want to participate?)
  4. What do you see as the mission of HA+C?
  5. What do you think have been its major contributions to education in the Houston area?
  6. Where do you think it should go from here? (How do you think it should refine its mission or strategies for accomplishing the mission?)
  7. What background/experience/characteristics do you think the new ED should have? (What would you be looking for?)
  8. Is there anything we haven't asked you that you'd like to tell us about the work of HA+C?
- How would you describe the primary “problem” in districts that HAC is addressing?
  - Do you feel that HAC is adequately addressing that problem? In what ways is HAC excelling?
  - How do you think HAC could be better serving these districts?
  - We have categorized the HAC work in four groups:
    1. School networks
    2. Model initiatives
    3. Leadership
    4. PolicyHow well do you think HAC is implementing programs in each of these areas?
  - As a board member, how do you ensure that HAC is achieving its goals and staying in line with its mission? What indicators do you monitor?

- How does HAC and its board determine which large grants to accept when they are offered? Do you have set criteria for assessing whether to accept them?

### Questions for Staff:

MPR is conducting exploratory interviews with key HA+C staff and several stakeholders this week in preparation to conduct an organizational evaluation of HA+C. This interview is not part of the actual evaluation but will provide information that will allow MPR to design that evaluation. Please know that neither this interview nor any subsequent information gathered as part of the evaluation process is being used to evaluate you or your work individually. Your responses are completely confidential.

We are hoping to gather information about the specific functions of the organization and its staff as HA+C works toward meeting its goals and how those goals and functions have evolved over time. We are also interested in knowing what staff and stakeholders imagine for the organization in the future and what you believe would be needed to get there.

Name of interviewee –

Job title –

*If applicable:*

**Current initiatives directly responsible for:**

Past initiatives directly responsible for:

1. What is your background/experience?
2. How long have you been with the organization? How would you characterize changes that have occurred in the organization?
3. (We know your title), but how does that translate into your overall responsibilities and your daily tasks?
4. As far as your responsibilities to specific initiatives, how and by whom are those responsibilities determined?
5. What do you see as the mission for HA+C? (In your perception, what is the key function that HA+C serves currently? Has that changed over time? How so? Before coming to work for HA+C, did you have any prior contact with the organization? In what capacity? )
6. What do you think have been its major accomplishments? (probe on those regarding specific details of what it was, how it came about, factors that contributed, who had major responsibility, how they knew it was a success)
7. What have been its (HAC's) biggest challenges, problems (barriers, shortcomings, dysfunctional areas)?
8. Focusing on the \_\_\_\_\_ initiative, what have been that program's biggest accomplishments?

9. What have been its (the initiative's) biggest challenges, problems (barriers, shortcomings, dysfunctional areas)?
10. How do you determine whether or not a program is going well? Do coordinators communicate this information across programs – how? How do you determine (as an organization) what strategies, programs, initiatives you will add to the work of HA+C?
11. What types of opportunities does the organization provide for staff to build content knowledge, i.e. knowledge that could be useful to schools and the community?

### **Projective**

12. Imagine it is 2012. What would you like to be able to say about how HA+C is working to improve education in Houston areas schools? Where would you like the organization to be in 5 years—what will the mission, programs or major strategies be? How will it be seen as an organization? How will people describe it? What staff will it have (numbers, expertise, roles)
13. What are some of the key things that would need to happen for that vision to be realized?
14. What would you want from the organization's leaders in order to help the staff achieve that vision? (What changes (if any) do you think need to occur in the mission, programs, or daily operations?)
15. What background/experience/characteristics do you think the new ED should have? (What would you be looking for?) Do you see the need for other staff, other areas of expertise?
16. Imagine for a moment that HA+C didn't exist...
  - What, if anything, would be more difficult in terms of improving schools and student achievement in Houston?
  - What things do you provide that would be missed so much, someone would try to provide them?
  - Are any HA+C influenced practices that are happening in the schools now could sustain themselves without your input?



## **Interview Questions for Participants in Houston A+ Programs**

### **Background**

1. Please describe briefly your background in education, including your current as well as former positions.
2. How long have you been working in education?

### **Impressions of A+**

3. How would you describe the overall purpose and goals of Houston A+ Challenge (i.e., if someone asked you what it is or what it does, how would you answer)?
4. It's my understanding that you have participated in the following events/activities sponsored by Houston A+: \_\_\_\_\_ Is that correct? (*If not, add correct information:*  
\_\_\_\_\_)
5. Could you tell me overall what your experience was with these activities? (How would you assess the quality of them—*format, content, presenter, logistics*? What general reactions did you have to the program (*or event or activity*)? Did you have different experiences with different activities (*if participated in more than one*)? (*If activity involved sequence of meetings, ask if person was able to attend majority of meetings.*)
6. Have you or your school received a grant or direct funding from Houston A+? How were the funds managed? What kind of monitoring or reporting did you need to do? (Was that helpful, burdensome?)

### **Impact/Performance**

7. Can you give me examples of knowledge or skills that you gained as a result of your participation in the Houston A+... (*activity, program, event*)?
8. What aspects of the A+ program have been most helpful to you?
9. What would you like A+ to do differently in the future? What would make their services more useful to you? (*e.g., more frequent/different offerings, more/different content or focus, more 1:1 support, better continuity of content from one meeting to the next, etc.*)
10. Do you have any suggestions or recommendations about how Houston A+ could or should play a role in improving education in the Houston area in the future?