

People · Knowledge · Action · Networks

LEADERSHIP

**Preparing Cross-Boundary Leaders:  
A Study of the Education Policy Fellowship Program**

**EPFP In Action**



*prepared for*  
Lumina Foundation for Education

**MATTERS**

## ABOUT THE INSTITUTE FOR EDUCATIONAL LEADERSHIP

Since 1964, IEL has been at the heart of an impartial, dynamic, nationwide network of people and organizations from many walks of life who share a passionate conviction that excellent education is critical to nurturing healthy individuals, families, and communities. Our mission is to help build the capacity of people and organizations in education and related fields to work together across policies, programs, and sectors to achieve better futures for all children and youth. To that end, we work to:

- ◀ Build the capacity to lead
- ◀ Share promising practices
- ◀ Translate our own and others' research into suggestions for improvement
- ◀ Share results in print and in person.

IEL believes that all children and youth have a birthright: the opportunity and the support to grow, learn, and become contributing members of our democratic society. Through our work, we enable stakeholders to learn from one another and to collaborate closely—across boundaries of race and culture, discipline, economic interest, political stance, unit of government, or any other area of difference—to achieve better results for every youngster from pre-K through high school and on into post-secondary education. IEL sparks—then helps to build and nurture—networks that pursue dialogue and take action on educational problems.

We provide services in three program areas:

- ◀ Developing and Supporting Leaders
- ◀ Strengthening School-Family-Community Connections
- ◀ Connecting and Improving Policies and Systems that Serve Children and Youth.

Please visit our Web site to learn more about IEL and its work: [www.iel.org](http://www.iel.org).

## BOARD OF DIRECTORS OF THE INSTITUTE FOR EDUCATIONAL LEADERSHIP, INC.\*

**Joseph A. Aguerrebere, Jr.**

President  
The National Board for Professional  
Teaching Standards

**Roy E. Barnes, Chair**

(Former Governor of Georgia)  
Chairman  
The Barnes Law Group, LLC

**Raymond "Buzz" Bartlett**

Principal  
RVB Consulting

**Bert Berkley**

Chairman of the Board  
Tension Envelope Corporation

**Martin J. Blank**

President  
Institute for Educational Leadership, Inc.

**Daniel Domenech**

Executive Director  
American Association of School  
Administrators

**Badi Foster**

President  
Phelps-Stokes Fund

**Regan C. Kenyon, Vice Chair**

President  
Secondary School Admission Test Board

**John May, Treasurer**

Partner  
New Vantage Group, LLC

**C. Kent McGuire**

Dean, College of Education  
Temple University

**Ericka M. Miller**

Vice President for Operations and  
Strategic Leadership  
The Education Trust

**Piedad F. Robertson**

Former President  
Education Commission of the States

*\* as of October 2009*

### Disclaimer

"The views expressed in this publication are those of the author(s) and do not necessarily represent those of Lumina Foundation for Education, its officers, or employees."

## INTRODUCTION

With support from Lumina Foundation for Education, the Institute for Educational Leadership (IEL) used its cross-boundary leadership development program, the Education Policy Fellowship Program (EPFP), as a learning laboratory to answer the research question, “*How do we get the leaders we need in education?*” Through a five-part study that included a literature review, a survey of alumni, focus group discussions, case studies of local EPFP sites, and lessons culled from EPFP’s leadership development program peers, IEL learned that the short, unvarnished answer is, “*We get the leaders for education we need by developing them.*”

The survey of EPFP alumni identified the benefits of EPFP participation to individuals and their employing organizations. It confirmed that participation in EPFP increased fellows’ knowledge base and refined their leadership skills, as well as strengthened their ties both within and outside the EPFP group. By developing *human capital* and creating *social capital*, EPFP had an enduring impact on fellows’ work efficacy and careers. Sponsors gain employees prepared to make research-based contributions to policy and practice and to use their expanded professional networks for gaining access to people and resources previously unknown or unavailable to the organization. While the immediate effects of EPFP are felt by individuals and their organizations, over time, the program also develops a larger, savvier systemic leadership capacity in a state.

The data from the EPFP Alumni Survey make it clear that EPFP meets its espoused goals. As one alumnus explained, “[EPFP] helped me understand my leadership style and improve areas of weakness. As a young professional, that training was very important to me and is something that I use every day. I use the information I learned as I manage staff and work with boards and committees.” Through EPFP’s combined site and national curricula, a foundation in leadership, policy, and networking is formed and built upon throughout the participants’ careers.

This brief describes how EPFP produces the outcomes documented in the study. It brings EPFP to life through case studies of four distinctly different EPFP program sites in Michigan, Mississippi, North Carolina, and Pennsylvania. The case studies, written by members of the research team, illustrate the uniqueness of each EPFP site, offer insight into how the programs organize for success, and provide an up-close-and-personal perspective on how and why individuals, organizations, and states benefit from EPFP. Each case study concludes with a forecast of the site’s prospects for the future. ❖

### Education Policy Fellowship Program

The Education Policy Fellowship Program (EPFP) is a leadership development program that provides job-embedded learning opportunities to individuals across the country who work in an array of public, non-profit, and private organizations serving children and youth. Its goal is to develop leaders for the contemporary policy environment through site-based, regional, and national learning activities focused on leadership, policy development, and networking. EPFP is a partnership between organizations in state capitals and/or major urban centers and the Institute for Educational Leadership (IEL), a non-profit organization based in Washington, DC. The program currently operates in twelve program sites and has been in continuous operation since 1964. EPFP has more than 6,900 alumni.

### About the Study

The study used a combination of research approaches, including a survey of EPFP alumni supplemented with a literature review, case studies of four program sites, and focus groups. IEL identified ways in which participation in EPFP benefits individuals and their employing organizations and how specific aspects of EPFP’s design and curriculum affect program outcomes. Additionally, one-on-one discussions held with senior staff from a wide range of leadership development programs, as well as staff from the fifteen EPFP program sites, confirmed these findings and led to a clearer understanding of key program elements that work best in mid-career leadership development programs designed to prepare individuals for public service.

## ACKNOWLEDGEMENTS

**T**he Institute for Educational Leadership (IEL) is indebted to Lumina Foundation for Education for supporting a study of the Education Policy Fellowship Program (EPFP). We are pleased to share what we learned from our research through three publications in IEL's Leadership Matters series.

This report, *Preparing Cross-Boundary Leaders: EPFP in Action*, provides a picture of four EPFP programs and documents how they adapt EPFP to their states' policy environment. Other publications in the series include *Preparing Cross-Boundary Leaders: For Education*, a report summarizing the findings from a survey of EPFP alumni, the centerpiece of the EPFP study, and offering ideas for improvement to inform policy makers—the individuals whose decisions have an impact on leadership development and related capacity building efforts. The report *Preparing Cross-Boundary Leaders: By Design* identifies the program elements necessary for successful cross-boundary leadership development programs and offers ideas for improvement to inform the work of leadership program staff. The complete EPFP study is available at: [www.iel.org](http://www.iel.org).

Many people made significant contributions to the EPFP study. Karen Seashore Louis, Rodney S. Wallace Professor of Teaching and Learning, Educational Policy and Administration at the University of Minnesota, took the lead in designing the five-part research project and the analysis and reporting of the survey results. She was ably assisted by Taryn McKenzie Williams, the EPFP Research Coordinator who had the task of conducting the literature review and writing the first drafts of the reports. Douglas Brattebo, EPFP Director, 2005–2008, oversaw the research project and orchestrated the work of the EPFP coordinators who helped conceptualize the study, reviewed drafts, and participated in focus group discussions. At the four case study sites, the EPFP coordinators helped arrange on-site interviews with various program stakeholders. Stefani Wilcox, EPFP Program Associate, provided technical assistance over the life of the project. Finally, many EPFP participants responded to the Alumni Survey and offered their suggestions through various focus group discussions. In essence, the EPFP study is their story.

IEL is both a leadership source and resource. We are a hub—or what the sociologists call a “third place”—for boundary-crossing leaders, and we are a research and action center, helping and leading people to proven solutions. IEL's history of achievement—working through networks to support reform agendas such as creating and sustaining community schools, ensuring the education of young people with disabilities, and improving school leadership—has given us immediate access to layers of perspectives on leadership for education. We are pleased to share both our access and those perspectives with you.



Martin J. Blank  
President, IEL

## EPFP AT-A-GLANCE

**E** PFP is designed to prepare leaders who can be effective in turbulent contemporary environments. Its goals are to (1) increase participants’ understanding of public policy, (2) develop their leadership capacity, and (3) broaden their professional networks and relationships in education, as well as other policy areas. In continuous operation since 1964, EPFP is an in-service, fee-based activity. Fellows work full-time in an array of organizations, and their employers pay their participation fee and travel expenses to national meetings. The program is a partnership between IEL and various state- and local institutions, agencies or organizations. During the two-year study, EPFP operated in fifteen program sites (see Table 1).

### How Does EPFP Produce the Outcomes Documented in the Study?

The first step in answering this question is to review the EPFP logic model. It is a simple graphic representation of the program’s “theory of action,” explaining

what the program is, does, and accomplishes (Taylor-Powell n.d., 2–8). EPFP was in business long before the emergence of theories of change and action, and the use of logic models to guide program implementation. However, a scan of historical documents and the collection of data from current and former EPFP staff at both the national and program site levels, led to the development of EPFP’s logic model (see Figure 1 on page 4).

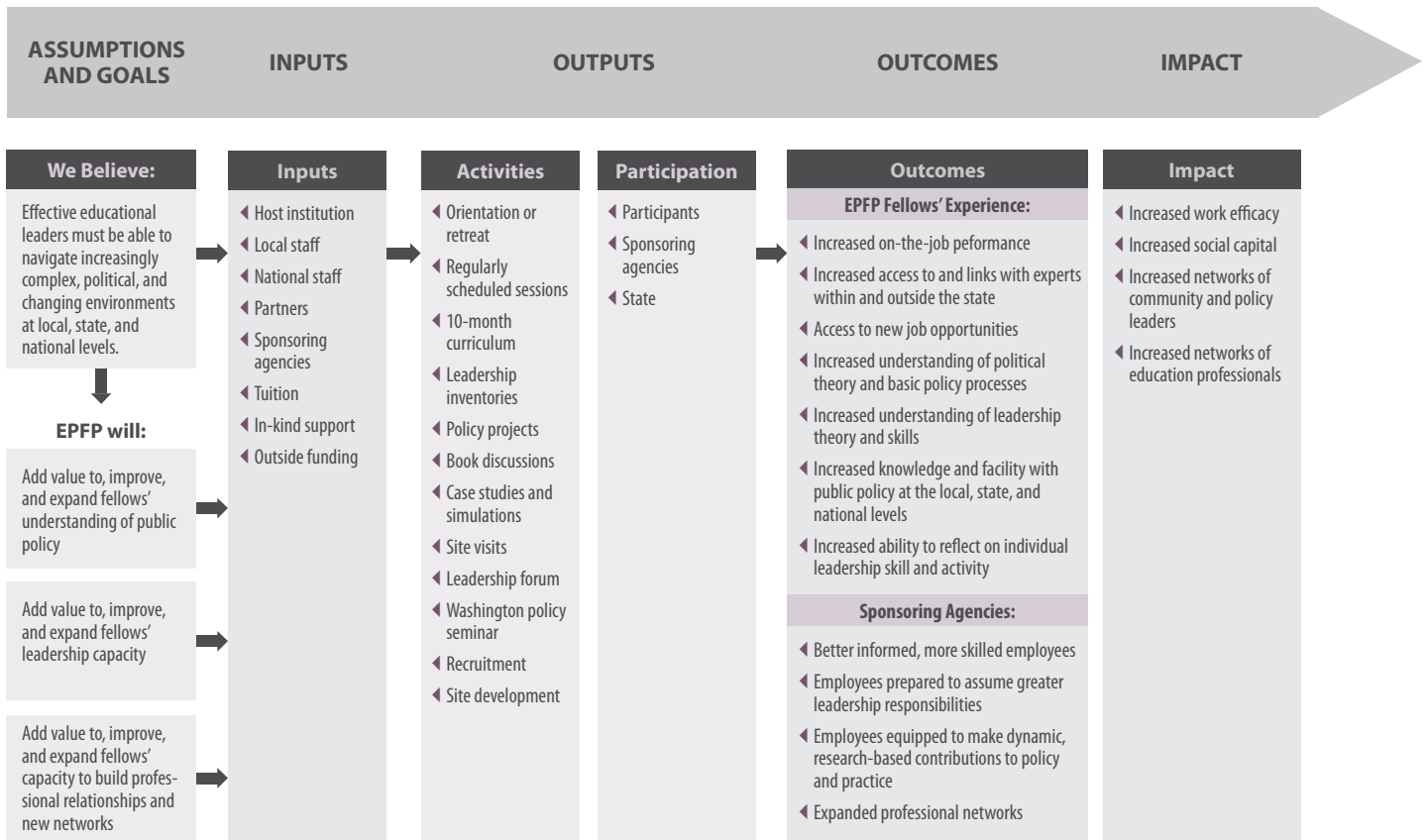
The logic model captures how one national program uses a common set of goals and outcomes to unite multiple programs and partners under one purpose: to prepare leaders for contemporary policy environments. The design of EPFP assumes that effective leaders for education must be able to navigate increasingly complex and ever-changing political environments at the local, state, and national levels. The new politics of education has brought new players to the policy table and altered the traditional power dynamics among a broadened set of stakeholders. These changes are creating new challenges; addressing them requires lead-

**Table 1. IEL’s Education Policy Fellowship Program (EPFP) Site Partnerships**

State	Institutional Partner
Arizona	Lincoln Center for Applied Ethics and Mary Lou Fulton College of Education, Arizona State University
Connecticut	Area Cooperative Educational Services
Georgia	Georgia Partnership for Excellence in Education
Massachusetts	Department of Political Science, Northeastern University
Michigan	The Education Policy Center, Michigan State University
Minnesota	College of Education and Human Development, University of Minnesota
Mississippi	Mississippi State University – Meridian and The Montgomery Institute
Missouri	School of Education, University of Missouri, Kansas City
New York	Teachers College Columbia University and Putnam/Northern Westchester Board of Cooperative Educational Services
North Carolina	Public School Forum of North Carolina, Inc.
Ohio	Center for Educational Leadership, Cleveland State University (CSU) and Lake County Educational Service Center
Pennsylvania	Education Policy and Leadership Center
South Carolina	South Carolina Association of School Administrators
Washington, DC	Institute for Educational Leadership
West Virginia	The Center for Education in Appalachia, Fairmont State University

Contact information available at: <http://www.iel.org/epfp/index.html>

Figure 1. Education Policy Fellowship Program Logic Model



ers who have a wide knowledge base and an arsenal of skills and abilities, starting with the capacity to work across boundaries in support of better outcomes for children and youth.

### Case Study Methodology

By itself, the logic model cannot capture the richness of a program as dynamic as EPFP, nor provide answers to common queries, such as: How do EPFP’s partners adapt the national program to their unique policy and practice contexts? Who builds and runs a program like EPFP? How do local sites organize for success? What are the challenges of running a leadership development program like EPFP? To give life to EPFP’s logic model, and to help answer these and related questions, IEL developed in-depth case studies of four EPFP sites: Michigan, Mississippi, North Carolina, and Pennsylvania. The goal was to interview EPFP alumni, EPFP coordinators, and other stakeholders

and chronicle each site’s operational and programmatic history. The case study site visits enabled IEL to capture the program and policy nuances that characterize each program (U.S. GAO 1990) and make it unique. Additional methodological detail is available in IEL’s full report to Lumina Foundation which can be found at: [www.iel.org](http://www.iel.org).

### EPFP: Up Close and Personal

The four EPFP case study sites—Michigan, Mississippi, North Carolina, and Pennsylvania—reflect the range of different program configurations. Two of the sites (Michigan and North Carolina) have been in operation for at least twenty-five years, but the other two sites (Mississippi and Pennsylvania) are relative newcomers, having been in operation an average of ten years. All of the sites have benefited from continuous leadership for at least four years, but have experienced leadership

and institutional transitions of varying complexity. The four sites also represent the variety of institutional partnerships that characterize EPFP.

Data from the interviews at each of the four sites confirmed the data obtained from alumni in the Alumni Survey. It also illustrated the role that EPFP plays with non-participants. Individuals who serve as speakers at EPFP events, but who have not participated in the program, note that making a presentation to the EPFP group is a learning activity for them. In Michigan and North Carolina, many interviewees shared the sentiment that EPFP created links and relationships between people throughout the state.

The case studies identify what is working at the four program sites and foreshadow the challenges they face. The leadership—of the coordinator and the partner or host institution—is a prominent theme in each of the programs chronicled. Who and where EPFP operates has a significant effect on the program’s ability to recruit participants and on the quality of speakers available to help implement the curriculum. The partner institutions and coordinators are different in each case study, but similar observations were made at each site visited. The reputation and credibility of the

local EPFP site is directly linked to that of its leader(s). This is a significant challenge given the strong interests and partisanship that can characterize organizations involved in education policy making. Lastly, the four case studies provide compelling insights into how local EPFP sites operate, highlight the effects of site programs on the participants, and confirm the overarching program challenge: sustainability.

Each EPFP site has a unique story to tell about the challenges of building and sustaining a program focused on cross-boundary leadership for education. Collectively, the four stories that follow are a reminder that capacity building is not a one-time event. Instead, it is an ongoing process that takes many twists and turns.

- ◀ Michigan EPFP: Good Policy, Good Politics (see page 6)
- ◀ Mississippi EPFP: The Little Engine that Could (see page 12)
- ◀ North Carolina EPFP: Passion and Perseverance—A Recipe for Success (see page 19)
- ◀ Pennsylvania EPFP: Timing and Leadership are Everything (see page 24). ❖

**“EPFP made me a P–20 thinker.”**

—North Carolina EPFP Alumnus

**MICHIGAN EPFP: GOOD POLICY, GOOD POLITICS\******Douglas Brattebo, Director, EPFP 2005–08***

**T**he Michigan EPFP has exhibited remarkable adaptability in a challenging economic and political setting. The site is an exemplar of how leadership continuity can help to embed a program into the fabric of a state's decision-making networks.

**Program History and Background**

An observer witnessing the genesis of Michigan EPFP (MI-EPFP) in 1975 would have been hard-pressed to envisage the program's scope, longevity and success. The MI-EPFP was initiated by two men of vision, the superintendent of the Lansing public schools, Carl Candoli, and his deputy, Matthew Prophet. They identified several needs in Michigan's educational system, including the isolation of schools from other agencies; a shortage of leaders, particularly minorities and women, who were prepared to work in urban school settings; and limited understanding of emerging ideas and practices that would improve the quality and delivery of education. Candoli and Prophet sought to build a program that would address these issues through leadership training and through the development of a forum for developing and supporting networks between education and other service sectors.

Their ideas emerged at the same time that EPFP was expanding its in-service program model to additional state sites—in this model fellows would remain in their home states and jobs for most of their experiences. After conversations with IEL, Candoli and Prophet agreed to launch a Michigan site. They nurtured the program through its first years, but in 1978 Candoli left the Lansing School District, followed by Prophet's departure in 1981. Ben Perez, (a fellow in Michigan's inaugural EPFP class) replaced Candoli as coordinator; subsequently, Prophet was replaced by Dan Schultz (a member of the second EPFP class). During this time, the program's relationship with the Michigan Department of Education (MDE) strengthened; EPFP continues to benefit from this early and

strong connection with the state's education agency. The Perez–Schultz partnership as EPFP coordinators would span a quarter of a century.

Perez's interest and expertise in leadership assessment, team building, and group dynamics translated into a significant emphasis on leadership development activities. The program also reflected his belief that fellows should spend more time in active learning than listening to lectures. This translated into learning formats that included site visits, interactive small group work, and simulations. Dan Schultz's policy experience in the MDE made him particularly aware of the need for collaboration among agencies, and his contacts in state government enabled MI-EPFP to begin recruiting fellows from a range of human services agencies, nonprofits, and the private sector. His personal knowledge of policy makers broadened the issues focused on and the speakers who participated in EPFP. More recently, Schultz's interest in technology has translated into a greater emphasis on the role of computers and telecommunications in building communities, teaching and learning, and supporting leadership development. In 1998, Perez and Schultz were joined by Jacquelyn Thompson (an EPFP alumna), Director of the Office of Special Education and Early Intervention Services at MDE, who has provided curricular and administrative support. This period of overlap helped facilitate a relatively smooth transition when Perez retired in 2006.

Another key transition occurred in 1995, when Schultz negotiated an affiliation between EPFP and the Education Policy Center at Michigan State University (MSU), giving the program a firmer institutional base, and increased name visibility. A 2006 memorandum of understanding between Schultz and Dr. Sharif Shakrani, co-director of the Education Policy Center (an EPFP alumnus), cemented the move. The Office of K–12 Outreach in MSU's School of Education, led by Assistant Dean Barbara Markle (an EPFP alumna), has gradually assumed a share of the promotion and outreach work in addition to some of the financial management responsibilities.

\* The case study includes information from the 1995 self-study, *Michigan EPFP: Celebrating Twenty Years of Success*.



Almost since its inception, MI-EPFP has drawn a significant number of fellows from state government, especially the MDE. Other sponsors include public and private schools, intermediate school districts, colleges and universities, professional associations, businesses and corporations, and advocacy organizations. Former fellows regularly go on to become sponsors, so the MI-EPFP has advocates in many groups that are at the center of the policy making process in the state. All those interviewed for this case study mentioned the diversity of the cohort of Michigan EPFP fellows as a strategic benefit. Current and former fellows stated that they found their classmates to be diverse in terms of gender, race, age, geography, professional background and experience, and opinion and ideology.

The program's format has changed as the program has matured. In the first year of the program, a cohort of six fellows attended ten dinner meetings, plus the Washington Policy Seminar (WPS). Soon a regional meeting was added which enabled fellows to network with EPFP peers from surrounding states. This regional meeting sparked the development of a second national meeting, the Leadership Forum (the Forum).

For more than its first decade, MI-EPFP meetings were held in restaurants. The dinner format was considered a central ingredient: fellows bond over dinner, and one or more presenters interact with the fellows. One alumna referred to these presentations as providing a “knowledge menu” of the leaders, issues, and crucial questions confronting policy makers in the state. Fellows testify that these interactive, wide-ranging discussions are a highlight of the MI-EPFP experience. Participants are compelled to reexamine their own views and to give new consideration to the views of others.

In the late 1990s, a shift was made to afternoon meetings (noon to 5:00 p.m.) every two to three weeks in order to save on the cost of food and to accommodate participants coming from long distances. Sessions begin with lunch and then presenters engage the fellows around subject matter. Three or four sessions, including orientation and the visit to the state capitol, involve the full day. Program innovations continue: in 2007–08, fellows participated in the MSU President's Education Forums, luncheon events organized around a single education policy topic and featuring a

speaker of state or national prominence. These events serve as a bonding catalyst for Michigan fellows and help to set the stage for their work in learning teams during the second half of the program year. Learning teams, consisting of four to six fellows, explore topics of mutual interest and are responsible for developing a seminar presentation during the program year. Alumni interviewed were split on the utility of this learning experience. Some found the teams to be useful, while others stated that the working groups were too insular and did not produce a take-away product for actual application.

The MI-EPFP was the first EPFP program to create a Web site. It has become an effective marketing tool and an archive of the program's history. All curricular materials are available on the Web site, which also serves as the hub of a nearly paperless program. All those interviewed mentioned the value of the Web site, and nearly all advocated that its capabilities be extended. Networking through technology (and traditional means) has been an effective tool for cultivating an active network of alumni.

## Individual Learning

Sponsorship is an important aspect of the MI-EPFP's recruitment. Future fellows often hear about EPFP from coworkers and supervisors who encourage and support their participation. One recent participant, a former teacher who is now a university professor, claimed that the key result for her personal development was a greater awareness of policy processes and that it entailed a major shift in “the perspective from which I view things,” enlarging her understanding of policy from a local understanding of the “rust belt” to a national perspective. It provided her another lens through which to interpret local context and enlarged her perspective about the interaction between national and state policy issues, particularly around the *No Child Left Behind Act* and accountability.

MI-EPFP is not an academic exercise. As one participant put it, “*This was post-graduate school political science in application.*” The program is designed to help fellows acquire an understanding of the policy process and the full range of things that drive it. This is done by providing access to policy makers as well as the places where policy is made. A day at the state capitol

provides exposure to officeholders, lobbyists, hearings, and the finer points of the legislative process. Regular sessions with authorities and practitioners assist fellows in seeing the nuances of the big issues. By the end of the experience, fellows learn about government infrastructure, acquire sensitivity to political pressure points across agencies and institutions, and learn how to work most effectively in particular environments. A common conclusion is that, as one alumnus put it, “[EPFP] provides a tutorial in the importance of compromise as part of good policy making and good politics.”

Individual leadership development was mentioned by a number of former participants as life changing. The following comment paraphrases one individual, a school district administrator in a large urban setting, who stated that participating in EPFP had direct effects on her thinking and on her approach to her work:

*“We read Mark Gerzon’s book, A House Divided, and this made me think about constituencies, categories, and participation—it caused me to look for commonalities and the greater good. David Hollister’s presentation on good policy and good politics made me emphasize the importance of compromise... I was placed in a room with many people of different belief systems and professions and had to examine a wide variety of ideas... Things that stand out about the EPFP experience include group processes and self-reflection; personality analysis; group problem-solving and utilizing everyone’s expertise; the close ties of policy and politics for problem solving...”*

MI-EPFP’s use of individual leadership assessment tools was also mentioned by several interviewees, who testified to the value of being put in a room with people who had different belief systems and professions. Several stated that working through joint projects with people they otherwise might not have gotten to know enhanced their ability to facilitate meetings and make presentations to unfamiliar constituencies. One alumna noted that, “[Her cohort] learned from many different people and many different entities and found that there was commonality in leadership issues across everything.”

## Career Development

One alumnus credited his participation in the program for a job promotion, but career effects most often are more nuanced, but equally significant. Another alumna put the role of EPFP into a larger context by comparing it with other development opportunities in which she had participated, including a week-long seminar at Harvard and her doctoral program. All of them affected her ability to work in and for institutions, but her appreciation for capacity building, within her own complex work setting and around the state, was built through EPFP.

Present and former participants spoke repeatedly of the value of EPFP in broadening their understanding of policy making and leadership, giving them entrée to overlapping networks in the state and beyond, and giving them context and perspective to work more effectively at solving problems. One current fellow, for example, stated that, “[EPFP promotes] deeper relationships across small communities of interests in a big state” (leading to) cross-fertilization of different methods of solving problems.” Another alumnus noted that he still engages, with significant effect, in the “unconscious application of particular concepts” that he learned in EPFP.

## Building State Capacity

The message delivered to MI-EPFP participants is that networking is a key to solving problems in Michigan, and that the role of the program in developing permanent ties with others in the educational and social services systems is pervasive:

*“In terms of participating in Michigan EPFP, once you see someone two to four times, the connections then become mapped. Most of the presenters are Michigan-ers and you see them in other contexts outside of EPFP. EPFP fellows join a community of alumni.”*

The networking that results from participation in MI-EPFP occurs in overt as well as subtle ways. Fellows get to know the presenters and each other and then see these new acquaintances outside and after EPFP. Contacting alumni and current fellows to obtain introductions becomes a common practice for some

participants; so too does reaching out to someone in a particular institution who is now at least somewhat familiar. Perhaps more frequently, EPFP is combined with other networks, facilitating entrée across professional boundaries. One alumna, who admits that she doesn't personally know the people in the Michigan power structure, emphasizes the importance of EPFP in helping her to gain access and knowledge when she needs it, pointing out that she feels that she has been "adopted into the fellowship" of people who have their fingers on the education policy pulse in the state.

In general, as one interviewee put it, "*Good relationships with people—having a good rapport with them, listening to them, and getting them to listen—are much more important than positional power when it comes to effective working relationships.*" Perhaps most important is the persistence of the network. While some participants acknowledge that their ties have weakened over time, one alumnus from the 1970s stated that he still calls fellows to obtain introductions to other people, and that he has built good relationships that cross state boundaries.

### EPFP in the Larger State Context

Many of the 796 individuals who have participated in the MI-EPFP now occupy significant leadership positions in the state. For example, the executive directors of the Michigan Association of Secondary School Principals, Middle Cities Education Association, Michigan Chamber of Commerce's Business Leaders for Educational Excellence, the Presidents Council, State Universities of Michigan, and the Educational Alliance of Michigan are former fellows, as is the Governor's Senior Advisor for Education. The EPFP network is now a unique pool of talent deeply involved in all aspects of the state's education policy system; collectively, it is an unparalleled network of professionals concerned with the well-being of children and youth.

MI-EPFP is well positioned to call on policy and leadership experts who challenge and engage with the fellows, a process that one alumnus described as "packed with activities." Friends of EPFP include state government leaders, policy analysts, lobbyists, and academic experts (many of whom are former fellows). The pre-

senters, they urge fellows to ponder not so much the *what* of policy making but the *why*, with an eye toward being able to initiate policy effectively. They also provide the fellows with a glimpse of emerging issues.

The program's position in the state is cemented by the size of the network and by its relationships with people such as David Hollister (currently leading the Prima Civitas Foundation and a former state legislator, mayor of Lansing, director of a state agency, and the individual who coined the phrase, "good policy, good politics") and Dr. Yong Zhao (University Distinguished Professor of Educational Psychology at MSU, director of the US-China Center for Research on Educational Excellence, and founding director of the Center for Teaching and Technology). Hollister and Zhao exemplify the talent committed to constantly updating the EPFP program content. (Hollister's involvement with MI-EPFP prompted him to write, *A Public Policy Primer: How to Get Off the Sidelines and Into the Game*, a report published jointly by IEL and MI-EPFP in 2007.)

### Conclusion

Having served as the MI-EPFP coordinator for twenty-eight years, Dan Schultz is the embodiment of the program. His work in state government, ties to MSU, and work with Michigan Virtual University (MVU) have given him unsurpassed contacts; he is as close to being irreplaceable as any program director can be. Nonetheless, he has made clear his desire to retire in two to three years, and the continuity of the MI-EPFP will depend on the continued functioning of the network that Schultz has built and utilized so effectively. He has repeatedly stated that MI-EPFP must not lose its networks as the site coordinator transition comes to pass, noting that he has witnessed many "clumsy passes of the EPFP baton" in other states. Presently, the lion's share of the coordination of MI-EPFP falls on Schultz. Thompson intends to play a larger role once she retires from state government, but managing the program has always been a co-coordinator responsibility.

The MI-EPFP needs a formal, written succession plan to transmit institutional knowledge in a systematic

fashion to the next generation of coordinators. The plan will need to elaborate the “sticky knowledge” about crucial program activities and functions, to cement relationships with program sponsors, and to enlist at least one understudy who can learn over a full year how things are done. (For example, Thompson found it very helpful to shadow Perez and Schultz over a period of time.)

One key to MI-EPFP’s staying power has been its ability to introduce and acquaint people from disparate institutional posts and weave them into dense social networks. Providing a protected space—in which bar-

riers come down and cross-fertilization of ideas takes place—is a centerpiece of EPFP. A second key has been the program’s capacity to increase participants’ knowledge of the policy-making process so that they can employ what one interviewee called their “credibility to make policy.” A third key has been the ability of MI-EPFP’s leadership to anticipate the state’s needs and position the program to take advantage of the gathering currents of change. The MI-EPFP must now adapt and do on a larger scale what it has done for over 750 professionals since 1975. ❖

**“In terms of participating in Michigan EPFP, once you see someone two to four times, the connections then become mapped. Most of the presenters are Michiganders and you see them in other contexts outside of EPFP. EPFP fellows join a community of alumni.”**

—MI-EPFP

**MICHIGAN—EFPF SPONSORING AGENCIES**

**PUBLIC SCHOOL SYSTEMS**

Allen Park Public Schools  
 Alma Public Schools  
 Ann Arbor Public Schools  
 Bear Lake School District  
 Breckenridge Public Schools  
 Bendle Public Schools  
 Buchanan Public Schools  
 Buena Vista School District  
 Charlotte Public Schools  
 Comstock Public Schools  
 Davison Community Schools  
 Dearborn Public Schools  
 Detroit Public Schools  
 East Lansing Public Schools  
 Eaton Rapids Public Schools  
 Fenton Area Public Schools  
 Flint Community Schools  
 Forest Area Public Schools  
 Fowler Public Schools  
 Goodrich Area Schools  
 Grand Ledge Public Schools  
 Grand Rapids Public Schools  
 Hartland Consolidated Schools  
 Haslett Public Schools  
 Henry Ford Academy of Manufacturing Arts and Sciences  
 Highland Park Public Schools  
 Holt Public Schools  
 Inkster Public Schools  
 Jackson Public Schools  
 Kalamazoo Public Schools  
 Kaleva Norman Dickson School District  
 King Academy—Inkster  
 L’Anse Creuse Public Schools  
 Lakeview Public Schools (St. Clair Shores)  
 Lakeview School District (Battle Creek)  
 Lansing School District  
 Lapeer Community Schools  
 Manistee Area Public Schools  
 Marlette Community Schools  
 Mason Public Schools  
 Michigan Virtual High School  
 Montrose Community Schools  
 Mt. Morris Consolidated Schools  
 Mt. Clemens Community Schools  
 Muskegon Heights Public Schools  
 Northport Public Schools  
 Northview Public Schools (Grand Rapids)  
 Olivet Community Schools  
 Oway Area Community Schools  
 Pennfield Schools  
 Plainwell Community Schools  
 Pontiac School District  
 Port Huron Area Schools  
 Reeths—Puffer Public Schools  
 Saginaw School District  
 Starr Commonwealth Schools  
 St. Joseph Public Schools  
 Utica Community Schools

Van Dyke Public Schools  
 Walled Lake Consolidated Schools  
 Wayne—Westland Community Schools  
 Whitmore Lake Public Schools  
 Wyoming Public Schools  
 Yale Public Schools

**PRIVATE K–12**

Archdiocese of Lansing  
 Genesee Catholic Board of Education

**INTERMEDIATE SCHOOL DISTRICTS/REGIONAL SERVICE AGENCIES**

Calhoun ISD  
 Clinton County RESA  
 Eastern Upper Peninsula ISD  
 Eaton ISD  
 Genesee ISD  
 Gratiot—Isabella RESD  
 Ingham ISD  
 Ionia County ISD  
 Kalamazoo RESA  
 Kent County ISD  
 Macomb ISD  
 Marquette—Alger RESA  
 Muskegon Area ISD  
 Oakland Schools  
 Saginaw ISD  
 St. Clair County ISD  
 Washtenaw ISD  
 Wayne County RESA

**COLLEGES AND UNIVERSITIES**

Central Michigan University  
 Eastern Michigan University  
 Ferris State University  
 Grand Rapids Community College  
 Grand Valley State University  
 Henry Ford Community College  
 Jackson Community College  
 Lansing Community College  
 Marygrove College  
 Michigan State University  
 Michigan Virtual University  
 Oakland University  
 Olivet College  
 Saginaw Valley State University  
 Schoolcraft College  
 University of Michigan  
 University of Michigan—Dearborn  
 Wayne State University  
 Western Michigan University  
 Washtenaw Community College

**STATE AND FEDERAL AGENCIES/INITIATIVES**

Governor’s Office for Job Training  
 MI Center for Educational Performance and Information  
 MI Children’s Trust Fund

MI Department of Agriculture  
 MI Department of Career Development  
 MI Department of Civil Rights  
 MI Department of Civil Service  
 MI Department of Commerce  
 MI Department of Community Health  
 MI Department of Consumer and Industry Services  
 Michigan Department of Corrections  
 Michigan Department of Education  
 MI Department of Human Services  
 MI Department of Labor  
 MI Department of Labor and Economic Growth  
 MI Department of Management and Budget  
 MI Department of Natural Resources  
 MI Department of Social Services  
 MI Department of State  
 MI Department of Transportation  
 MI Department of Treasury  
 MI Family Independence Agency  
 MI Office of the Governor  
 MI House Fiscal Agency  
 MI Jobs Commission  
 MI State Police  
 MI State Senate  
 MI Office of Services to the Aging  
 MI Senate Fiscal Agency  
 MI School for the Blind  
 MI School for the Deaf  
 Office of U.S. Senator Carl Levin (MI)  
 State Technical Institute and Rehabilitation Center  
 W.J. Maxey Training School

**ASSOCIATIONS**

Greater Detroit Chamber of Commerce  
 MI Association of School Administrators  
 Michigan Association of School Boards  
 MI Assn. of Secondary School Principals  
 MI Association of Nonpublic Schools  
 MI Association of Community and Adult Education  
 MI Cooperative Extension Service  
 Michigan Education Association  
 MI Elementary and Middle School Principals Association  
 Michigan Head Start Association  
 MI Institute for Educational Management  
 Michigan Nurses Association  
 MI Partnership for New Education  
 Michigan Public Health Institute  
 Michigan School Business Officials  
 Middle Cities Education Association  
 MSU Alumni Association  
 MI Association for Computer-Related Technology Users in Learning  
 National Staff Development Council  
 Presidents Council, State Universities of Michigan

**BUSINESSES AND FOUNDATIONS**

American Youth Foundation  
 Ameritech  
 Charles Stewart Mott Foundation  
 Cisco Systems  
 DaimlerChrysler Financial Services  
 Detroit Educational Television Foundation  
 Electronic Data Systems (EDS)  
 The Faverman Group, Inc.  
 Flint Business Roundtable  
 Ford Motor Company  
 Henry Ford Health System  
 High/Scope Educational Research Foundation  
 Learning Designs, Inc.  
 Merit Network, Inc.  
 MI Chamber of Commerce Foundation  
 Multi-Media Classrooms, Inc.  
 New Detroit, Inc.  
 Program Works  
 Public Sector Consultants, Inc.  
 Saint Mary’s Health Services (Grand Rapids)  
 TechMed  
 Ryder System Charitable Foundation  
 The Cleveland Foundation  
 Wallace Foundation  
 W. K. Kellogg Foundation

**ARTS ORGANIZATIONS AND MUSEUMS**

Henry Ford Museum and Greenfield Village  
 Michigan Very Special Arts Festival

**RESEARCH AND ADVOCACY ORGANIZATIONS**

Citizens Alliance to Uphold Special Education (CAUSE)  
 Child and Family Resource Council—Kent County  
 Children’s Law Center—Grand Rapids  
 The Efficacy Institute—Detroit  
 Great Lakes Center for Education Research and Practice  
 Healthy Homes = Healthy Kids  
 Leadbaster Program, Detroit Project  
 Mackinac Center for Public Policy  
 Michigan’s Assistive Technology Resource  
 Michigan Economics for Human Development  
 Michigan League for Human Services

## MISSISSIPPI EPFP: THE LITTLE ENGINE THAT COULD

*Karen Seashore Louis, Rodney S. Wallace Professor, University of Minnesota*

**T**he Mississippi EPFP has operated with limited financial investment and little significant institutional support. In spite of these limitations, by the time this report is published, 148 individuals will have completed the one-year, intensive program designed to address two interlocking goals: (1) enlarge the networks that Mississippians use to create consensus around educational improvement and (2) develop the next generation of leaders for institutions that influence educational policy. (Note: The Mississippi EPFP is currently on sabbatical.)

### Program History and Background

The Mississippi EPFP (MS-EPFP) program was established in 1996, as part of a broader effort on the part of several people in the state to strengthen leadership development activities. Among the initial group discussing Mississippi's need for EPFP were Marty Wiseman (the director of the Stennis Institute at Mississippi State University, Starkville (MSU/S), Ned Lovell (former Chair of the Education Department, MSU/S), and Bill Crawford (former and now also current Director of the Montgomery Institute, a non-profit regional development organization in Meridian). The Education Department at MSU had begun to develop a non-traditional doctorate for community college leaders (now in its seventh year), and the initial hope was that EPFP would become a component of all of the campus's doctoral leadership training. The intent, however, was always to serve a broader audience from across the state.

The history of the program reveals both its collaborative roots and some instability in institutional auspices. In 2001 Ned Lovell retired, and program sponsorship moved from the MSU/S campus to a shared responsibility with the MSU campus in Meridian (MSU/M); in 2003 the auspices changed again. Currently, the MS-EPFP is run only from MSU/M. During the transition period there were several co-directors, including Professor George Thomas,

who is also the chair of the Education Department at MSU/M, the late Elizabeth Burns (co-director from 2002–03) and Randy Reeves (co-director from 2004–06). In 2005–06, Professor Thomas was the sole coordinator, and in 2006 he was joined by Linda Coats as co-coordinator. While the program is located at MSU/M, the Montgomery Institute serves as the fiscal agent. MSU/M supports the director's travel and expenses, and the Montgomery Institute contributes pro bono administrative and strategic support.

From the beginning, the goal was ambitious: to have a group of participants drawn from all educational sectors (early childhood, K–12, community colleges, and state universities) and other human service sectors to serve the whole state. Initial funding from the Phil Hardin Foundation provided money for scholarships, and the program recruited broadly, with cohorts of up to twenty participants reflecting the desired diversity. External funding was temporary, and the program currently draws only from sponsoring agencies that are able to pay all or most of the costs of their employees' participation. Cohorts are, therefore, smaller (typically around a dozen in the last few years) and there are few agencies/districts that send a participant every year. The program has, however, maintained diversity in the educational sectors from which they draw. According to the MS-EPFP Web site: <http://www.iel.org/epfp/state/ms.html>.

The diverse range of fellows' backgrounds and experience has facilitated an exploration of the systemic nature of major educational and social issues facing the state. In terms of Mississippi's future, collaborative leaders who are "boundary spanners" are required for real progress to occur. The goal of the Mississippi site is to build a statewide cadre of diverse leaders who understand educational policy issues and processes. All training is designed to build common ground and common values and, most importantly, to nurture a new generation of leaders willing to confront public policy issues facing the state.

Curriculum specifics have evolved over the years, but the MS-EPFP has maintained a similar approach to participant experiences, defined by active learning, exposure to diverse voices and perspectives, and a focus on in-depth analyses of current issues facing the state. In addition to the national meetings sponsored by IEL, the cohorts meet monthly, usually in Jackson, starting on Sunday evening and continuing through Monday afternoon. The extended time period for meetings allows people to drive from further corners of the state (Jackson, Mississippi, is somewhat centrally located), and to have access to many of the policy makers, government employees, and analysts who provide input into the participants' experiences. There is a balanced emphasis on presentation and discussion in every meeting.

According to all who are involved in the program, while there is an effort to build participant's understanding of leadership attributes and their own strengths and weaknesses (Steven Covey's *Seven Habits* training is part of the early sessions), the primary focus of both content and discussion is on how individuals, agencies, and networks of committed people can work together to improve education in Mississippi. As director Thomas points out, people who graduate from the leadership preparation programs usually know a lot about how to run an organization, but little about how to make a difference by becoming a participant in the policy process. At the heart of MS-EPFP's vision is developing the awareness, the relationships, and the passion for creating change in the state. One participant commented that the program and curriculum variety was important because, *"The sessions and the activities that we participated in allowed different leaders in the group to emerge."*

A recent meeting illustrates the kind of experiences provided by the MS-EPFP. Rather than meeting in Jackson, the group met in the small coastal community of Ocean Springs, Mississippi. The session focused on legislative action in education (moderated by Ocean Springs' state representative), cross-sector collaboration for educational policy development (with involvement from Northrop Grumman and Chevron), and a discussion of the links between rural development and educational policy. While the session took advantage of the location, participants from other parts of the state were engaged in discussing the

applications to their own settings. At the spring meeting and just prior to the IEL Washington experience, the cohort spent all day with two former associates of Senator John Stennis, who gave them an introduction to how Mississippi works in Washington to benefit the state, helping them to develop a conceptual bridge between the federal policy apparatus and the state policy apparatus.

## Individual Learning

Participants currently involved in the program (and those who participated recently) all commented about the scope and intensity of the material to which they were exposed. Because much of it was very new to the participants, there was a sense that it would take years to fully absorb what they had learned. One person reflected the views of many when he remarked:

*"Talk about a whirlwind experience—different people from those I had worked with before—all backgrounds, all levels—and the relationships we made, the information that we had to assimilate, the travel, and the time—I know that there was so much that I missed!"*

On the other hand, every participant was able to point to elements of the curriculum that were immediately useful and, in some cases, seriously challenged their previous worldviews. For some, the most immediately relevant experiences were around personal leadership skills and understanding. One person, who moved on to become a community college president, felt that his exposure to Covey's *Seven Habits* training was a life-changing experience and marked a turning point in his career simply because it caused him to look at leadership in a different way. A more recent graduate felt the same way, pointing, in particular, to the significance of understanding negotiation in his current position as the chair of a department in a higher education setting. A third participant said, *"I bring what I've learned back to work—I made a presentation about current policy to the School Board, wrote a letter to the community newspaper..."* An African-American principal said that his participation in the program really helped him in managing people.

Participants also emphasized the importance of exposure to ideas and issues that went far beyond their previous experiences. One recent participant, for

example, emphasized how the variety of perspectives offered in the program changed her work in unanticipated ways; she gave a number of specific examples:

*“I know the things that I brought back that were most important... From my participation I learned how to share issues that our legislators are discussing and to develop more active involvement [among faculty] in my school... I meet monthly with my teachers now to talk about these issues, as well as classroom and instructional challenges... The program’s focus on workforce preparation issues was particularly important because I am able contribute to my district’s discussions about expanding offerings, including dual enrollment... and it has really changed the way that I work with parents, particularly low-income parents, to encourage them to get access to services that can help them and their kids over the long haul.”*

Others also pointed to the practical importance of a new appreciation for the policy process. Another participant, currently employed in a school district office, noted that the intensity of the program gave him the opportunity to really understand the institutional perspectives that other participants came with, and as a result made him much more sensitive to the broader educational needs of students from birth through higher education. This, in turn, helped him to moderate discussions of policy that often focused exclusively on inter-sector competition for state resources.

However, beyond the specific uses of knowledge gained through the program, many pointed to the importance of simply absorbing different perspectives from other people whose background and institutional affiliations were different:

*“I was the only elementary principal in the cohort... There were college professors, community college administrators, an assistant superintendent... and to see that we had the same common concerns, and to share with them the specifics of what I face on a daily basis—those were the best conversations. It was within the group that the greatest learning took place.”*

The participants uniformly indicated that it was the active participation, whether in conversations like the one described above, or interaction with presenters, that made the MS-EPFP experience different from many of the other leadership development activities in which they had participated.

## Career Development

The impacts of the MS-EPFP on individual careers occur in multiple ways. Sponsorship is important in Mississippi, and most participants discuss the role of the program as part of being mentored for career advancement. Being nominated for EPFP is a visible symbol that others have recognized their potential; all of the participants confirmed that they were actively recruited and sponsored by their employer or another influential mentor. One recent participant said, for example, that he was asked by his superintendent if he wanted to participate shortly after he joined the district—but after he had made an effective policy presentation to the board. On completing the program, he was given significantly greater responsibilities in an area that stretched him well beyond his formal training. A community college administrator noted that he was mentored by several people, who advised him to go through a series of leadership development experiences, with EPFP as the “capstone.” Another K–12 leader pointed out that, *“I think that it is an investment for the school district to provide this kind of experience to a younger administrator because it brings a lot back to the district.”*

Simply polishing a career whose outlines are clear is not, however, the only effect that EPFP had on some of the participants interviewed. One individual said that, *“[It] changed my career options by clouding them... I always thought that I wanted to work at the college level, but after EPFP I began to see that perhaps I could have a greater impact in K–12... Right now, I’m just waiting to see what will happen next.”* Another person indicated that his exposure to EPFP motivated him to do something that he had always wanted to do—run for public office. A third pointed out that EPFP gave her confidence in her ability to be a really good leader in her setting at a time when she was encountering some uncertainty.

The career enhancing effect of EPFP in Mississippi goes well beyond sponsorship. Mississippians are fond of joking that the first question you will be asked when you meet someone new is, *“Who’s your Daddy?”* which is a shorthand way of explaining the important role of informal personal connections in a small state where people get things done by participating in dense networks characterized by social trust. As the program



sponsors and presenters point out, what MS-EPFP does is enlarge access to the state's informal networks of influence. Network-building is not confined to the cohort members, but enhanced by an explicit effort to build connections between the presenters—many of whom are among the key formal and informal people of influence within the state—and the participants. EPFP cohort members are encouraged to use their access through the EPFP label to contact and network at top levels.

EPFP participants are well aware of the personal significance of accessing both cohort and presenter networks. The short-term effects were noted by an individual who kept in touch with several participants from both his cohort and others, *“They’re somebody you can call on when there’s an issue that you want to talk about.”* He went on to say that access was the big benefit for him:

*“There are some big-time educators who have gone through this program... Just this January I connected with [another alumnus] who is pretty much a junior college head honcho for the state—just the access that you have... This program is on the top tier of [networks] in the state. I’ve been through superintendent preparation programs, through local networking activities, but for my professional growth, the EPFP people have given me more access to more people.”*

Capacity building and the value of networks go beyond the policy arena, reaching more deeply into the day-to-day work of administration. A participant noted that she recently attended a meeting on classroom management where a main presenter was an EPFP graduate—and because of their connection was comfortable asking her to present in another context. *“It was easy to do that because we knew each other through EPFP.”*

## Building State Capacity

The program is explicit in its objective of working within an existing culture that values informal networking as well as developing understanding of the formal positional authority structure and processes. What underlies the program sponsors' aspirations is the hope that they will reinforce a respect for and understanding of what it takes to work across ideological and party lines. One person who has been associated with the program since its earliest days commented:

*“What we try to do in EPFP is to develop leadership for educational policy in a way that is non-partisan, to help people learn how to work with all kinds of people with different perspectives to develop consensus around educational policy. If you can get enough people to buy into that approach, then you’ll find your policy formation easier... Now we’re seeing some of this in practice. We have a conservative governor who cares about education, so it’s an opportunity for people to come together to do good things for education, to reach across party lines—and you want to build a culture supporting that... bridging the chasms is what this program is all about.”*

In Mississippi, the EPFP network includes many people who also now occupy top positions as superintendents, presidents and vice-presidents of community colleges or universities, and the former commissioner of the community college system. In addition, the program's organizers deliberately involve presenters, particularly those from outside the educational sector, in helping to develop curriculum, with the goal of expanding the network of influential people who support EPFP and public education, *“EPFP certainly isn’t [solely] responsible for that, but it’s one of the things we do to sustain it.”*

One of the issues, in spite of the nine years of program operation and 148 alumni, is that the program is still not widely known in the state. Some relatively large districts have never sponsored a participant. The University of Mississippi and MSU used to be collaborators, but are no longer. The community colleges send people, but are not champions. One presenter noted that, *“It’s the major issue... we’ve never gotten to the point where we can get them to commit...”* Thus, there is a sense of frustration among the sponsors and presenters that the program is more limited in its

place in the “network-creating” sponsorship system in Mississippi than its potential suggests. In addition, one person noted that programs like EPFP only supplement the connections that are made through family, football games, and other loose networks, as well as formal, but transient, educational development initiatives like the current governor’s *Momentum Mississippi*.

## EPFP in the Larger State Context

According to everyone, Mississippi’s educational challenges are great and include high rates of poverty, economic development challenges, and post-Katrina recovery. Several people commented that EPFP is important because it raises the sensitivity of all participants about the interconnectedness of the policy issues. With an increased understanding of the complexity of educational development comes a sense of collective responsibility. An elementary school principal said, for example, that she has a greater awareness of how vocational education, which she previously saw as the purview of high schools and community colleges, needed to be incorporated into the curriculum and parent-outreach efforts for much younger children if the state is to meet its future manpower needs. *“Being able to see how it all fits and how we can make a difference at the elementary school level is important.”* In addition, everyone noted that EPFP was unique in Mississippi because there were no other easily available, programs that expand reflective horizons rather than focusing on targeted knowledge and skills. As one participant commented, *“This is truly a program where you can grow professionally—if I want this kind of experience now, I need to go out of state.”*

According to all of its founders, supporters, and presenters, the MS-EPFP is active and effective. It is, however, hampered by its inability to raise additional funding. According to several estimates, the cost for each participant is approximately \$3,500 to \$4,000—\$2,500 for tuition, including support for the IEL-sponsored activities, and the remaining additional costs associated with attending the national meetings and travel within the state. In Mississippi, this is viewed as a great deal of money to invest in developing leadership capacities in individuals. As a result, promoting EPFP as a state capacity-building initiative, to date, has proved difficult. A number of the participants

are able to attend only by contributing a significant proportion of the costs. With no institutional funding for administration and development, marketing the program to make sure that there is a sufficiently large cohort takes much of the volunteer director’s time.

An effort to create a revenue stream by including EPFP as part of doctoral work has not been well supported within the university. The program has weathered one leadership transition, but is likely to face another in the near future. Both the current coordinator and the most active supporters of the EPFP program in the Montgomery Institute and the university are in their mid-60s or older; there are no obvious replacements for the energy that they have devoted to EPFP. Everyone agrees that it is important, for the program’s legitimacy, to remain associated with a university. MSU is still an obvious choice because of its history of involvement in both leadership development and policy. Stronger relationships with other higher educational institutions, however, particularly the major universities, are viewed as essential to stabilizing the program.

The MS-EPFP has a low profile because it has not been able to get the state to grant continuing education credits for participation nor to commit any funding to sponsor participants from state government. While state agencies have professional development programs for school administrators, these have tended to focus on specific information and skill development, but have not picked up on EPFP’s broader focus on leadership capacity. While there have been occasional attempts to create linkages with other universities in the state, the usual barriers and institutional competition create barriers.

A variety of options to plan for program leadership and sustaining funding are underway, such as actively recruiting participants from business and from other professional groups that are increasingly connected with educational policy. On the other hand, there is concern that the program not become dominated by people who are not directly concerned with providing education at all levels.

## Conclusion

As noted at the beginning, individual leadership and career development are a byproduct rather than a focus of the MS-EPFP. Instead, the program has endeavored to prepare future (and current) leadership to understand the formal and informal structures that support Mississippi's educational policy development and to give participants entrée to networks that allow them to become active in the policy process. The program is rooted in an acceptance of Mississippi policy culture, in which sponsorship and personnel connections are an explicit component of becoming an influential leader. It also is based on the belief that Mississippi education will improve only if there is cross-sector, cross-political party collaboration and understanding. Rather than competing for scarce resources

in a poor state, policy must build on common vision and understanding. These principles are voiced by all participants, presenters, and sponsors.

The MS-EPFP has been successful, in spite of financial constraints and a weak institutional base, because it is embedded in Mississippi institutions and has sustained connections with key people and networks (including its graduates) that make the educational policy environment function in the state. Mississippi has a reputation for weakness in its K–12 educational system, but it also has a several decades-old commitment to improvement and standards. The challenge is to sustain its success, which is based on volunteer support by individuals who believe in its efficacy, in an era of constrained resources for all educational institutions. ❖

**“In terms of Mississippi’s future, collaborative leaders who are ‘boundary spanners’ are required for real progress to occur. The goal of the Mississippi site is to build a statewide cadre of diverse leaders who understand educational policy issues and processes.”**

—MS-EPFP

**MISSISSIPPI—EPFP SPONSORING AGENCIES**

**PUBLIC SCHOOL SYSTEMS**

Aberdeen School District  
 Alcorn County Schools  
 Canton Public Schools  
 East Jasper School District  
 Hattiesburg Public Schools  
 Hinds County Public School District  
 Humphreys County School District  
 Jackson Public School District  
 Kemper County Schools  
 Lauderdale County Schools  
 Leake County School District  
 Madison County Public Schools  
 Meridian Public School District  
 Natchez-Adams School District  
 Neshoba County Schools  
 Newton County Schools  
 Ocean Springs School District  
 Picayune School District  
 Quitman Public Schools  
 South Panola School District  
 Sumter County Board of Education (AL)  
 Tupelo Public School District  
 Yazoo City Municipal School District

**COLLEGES AND UNIVERSITIES**

Delta State University  
 East Central Community College  
 Holmes Community College  
 Itawamba Community College  
 Southwest Tennessee Community College  
 Jackson State University  
 Jones County Junior College  
 Meridian Community College  
 Mississippi Gulf Coast Community College  
 Mississippi State University  
 Mississippi State University, Meridian  
 Mississippi Valley State University  
 Northeast Mississippi Community College  
 Pearl River Community College  
 University of Mississippi  
 University of West Alabama  
 Wallace Community College

**STATE AND FEDERAL AGENCIES/INITIATIVES**

MS State Board for Community and Junior Colleges  
 MS Department of Education  
 MS Department of State  
 Naval Reserve Center

**ASSOCIATIONS**

Mississippi Private School Association

**BUSINESSES AND FOUNDATIONS**

Bank Plus  
 CREATE Foundation  
 Lockheed Martin  
 Phil Hardin Foundation

**RESEARCH AND ADVOCACY ORGANIZATIONS**

Bolivar County Head Start  
 Central Mississippi, Inc.  
 Coahoma Opportunities, Inc.  
 Five County Child Development Program, Inc.  
 Friends of Children of Mississippi, Inc.  
 Institute of Community Services, Inc.  
 Lift, Inc.  
 MS Action for Progress, Inc.  
 MS Forum on Children and Families  
 P.A.C.E., Inc. Head Start  
 Pearl River Valley Opportunities  
 The Montgomery Institute  
 Washington County Opportunities, Inc.

## NORTH CAROLINA EPFP—PASSION AND PERSEVERANCE: A RECIPE FOR SUCCESS

*Taryn Mackenzie Williams, Research Coordinator, EPFP*

**T**he North Carolina EPFP has achieved notable success in its twenty-eight years of operation. The Raleigh-based program has remained stable and of high quality despite transitions in institutional sponsorship and coordination in the early 1990s. The program boasts a rigorous schedule—fellows meet each week for a total of thirty-five sessions—and over 575 alumni.

### Program History and Background

The North Carolina EPFP (NC-EPFP) began in 1979 with a series of conversations between then national EPFP director Paul Schindler and state superintendent Craig Phillips. The program was born of Phillips' desire to enhance the leadership capacity and policy knowledge of educators in the state. Phillips selected Jan Crotts, a well-respected and connected lobbyist, as the ideal person to develop and direct the program. In its first thirteen years, EPFP was affiliated with the North Carolina School Boards Association (NCSBA) where Crotts worked. In the early 1990s, Crotts left NCSBA to work for the Southeastern Regional Vision for Education (SERVE), which occupied space at the Public School Forum of North Carolina. The Forum, as it is commonly known, became the new institutional home of NC-EPFP.

The Forum is a natural fit for EPFP. The independent, not-for-profit think tank conducts research and administers a number of programs designed to enhance the capacity of education policy makers, teachers, and members of North Carolina's business community. The executive director, John Dornan, and the associate executive director, Jo Ann Norris, have provided significant support to EPFP since it was housed at the Forum. Norris joined Crotts as a co-coordinator in the early 1990s and provided a smooth transition when Crotts stepped down a few years later. Gladys Graves, an EPFP alumna and director of the North Carolina Teaching Fellows Program, joined Norris as co-coordinator soon after Crotts's departure.

Co-coordinators Norris and Graves retained and strengthened the curriculum developed by Crotts in

the program's earliest years. NC-EPFP meets weekly for a total of thirty-five, three-hour dinner sessions. The large number of sessions gives fellows access to a number of resources from North Carolina's education policy circles. Over the course of the year, fellows engage in seminars with legislators, journalists, researchers, judges, state and local education agency staff, business leaders, community leaders, and others important to education policy in North Carolina.

The program is deliberately designed to provide participants with a broad overview of sociopolitical trends in the state. In the first part of the program, sessions trace major political and policy initiatives through the lenses of leaders who have experienced them; landmark cases in desegregation and school finance figure prominently in these sessions. Fellows are also introduced to demographic trends and their impact on the region and its educational systems. In the second part of the program, participants delve deeply into the norms and regulations that shape education policy making in the state. Fiscal and legislative experts provide hands-on presentations on economic and political trends. Leading education organizations also provide an in-depth look at how they develop their policy agendas.

The fellows in NC-EPFP are as diverse as the state's policy-making processes. The Department of Public Instruction (DPI) is a consistent supporter of the program; each year's cohort features several employees from different divisions within the agency. In recent years, the Teacher of the Year has been a participant in the program. In addition, fellows come from the General Assembly's legislative staff, local think tanks and advocacy groups, area school districts, and other public education stakeholder organizations.

### Individual Learning

The coordinators pay close attention to the three components of the EPFP program—policy, leadership, and networking—when refining each year's program. The result: a tightly woven curriculum that sparks fellows' learning and interest from day one. Networking in

NC-EPFP is about developing relationships. Connections that form between fellows provide the basis for the learning and development that continues throughout the year. This process begins with the introductory seminar, an extended session that lasts approximately six hours and focuses on cross-cultural competencies and the role of dialogue in an effective exchange of ideas. Alumni who have participated in the session credit the opening session with setting the stage for the rest of the program year. Fellows begin to develop the trust that contributes to the intimate learning environment. Many fellows also credit the physical surroundings for playing a role in the bonds that build within the group:

*“Walking into [EPFP] you grab your glass of wine, pick up some dinner, and drop down in your chair to talk to colleagues. For some people, I think it was the least threatening environment they’d face all day... The amount of time you spend together means you get to know people personally and professionally... and you better not forget the dessert when it’s your night!”*

The relationships that develop between fellows provide the foundation from which to explore North Carolina’s complex policy-making processes. The experts that speak to the fellows during the year focus on the issues and initiatives that drive policy discussions in the state. While fellows may already be familiar with the presenter, many alumni highlight the special nature of the EPFP meetings:

*“Sometimes, many times, you would see these folks on television and you know who they are, but it’s different when they sit around the table with you talking about what goes through their mind as they do their jobs every day. You feel like you’re getting something that you wouldn’t necessarily get on [TV].”*

Many fellows directly link their increased knowledge of key political issues affecting education policy making to the intimate conversations with these prominent figures. During one popular session, Judge Howard Manning, the individual who presided over the influential Leandro school finance case, shared insights and knowledge gained from that experience.

Fellows also cite the effectiveness of interactive sessions designed to put them directly in decision makers’ shoes. One such activity is the annual “Budget Busters” session. The exercise, lead by fiscal expert Tom Covington, is grounded in experiential learning. Fellows are divided into three groups: a House Ways and Means Committee—a hybrid of North Carolina’s Finance and Appropriations Committees; a Senate Ways and Means Committee—another hybrid; and a group of special-interest lobbyists. After an in-depth review of the state’s fiscal regulations, teams of fellows are responsible for developing a balanced budget over a period of one week as the lobbyists work furiously to advance their own causes. Covington is adamant about the impact of the activity on participants, “*Experiential education is how you teach [budget]; the didactic stuff won’t work on this topic... It really teaches them about the constraints of lawmakers and they’re forced to work together.*”

Fellows also report having opportunities to develop as leaders while observing and interacting with powerful individuals from around the state. The Myers-Briggs Type Indicator® (MBTI), a widely used tool in leadership development, is used to help fellows begin to understand themselves and their personal leadership attributes better. Fellows are also explicitly encouraged to question and challenge the leaders who attend their sessions:

*“Being in the room with the folks makes you think twice about some of the decisions [our] leaders make. You get to hear what goes through their head and you begin to understand why they do one thing or another. It gave me perspective on my own work and has helped me in decisions that I’ve made in my own career.”*

Learning about oneself as a leader is closely linked with the career development and enhancement that fellows report as a direct result of their participation in EPFP.

## Career Development

Fellows point to short-term and long-term effects on their career as a result of their participation in NC-EPFP. In the short-term, alumni mentioned an increased sense of confidence that occurs at the time of nomination and persists throughout their fellowship year:

*“Being recommended for EPFP was a big thing in my district. When the superintendent calls and asks you to participate in EPFP, you don’t say no.”*

*“There was a sense in EPFP that you were being exposed to the real story. I’d come out of sessions feeling much more comfortable talking around [my organization] about the big things that were going on in the state.”*

In addition to enhanced confidence, some fellows reported receiving increased responsibilities as a direct result of their EPFP participation, *“People see that you’re in the program and they perceive you as really getting what is going on in the [state]. You get asked to do more.”*

The increased confidence and job responsibilities experienced by the fellows also led to long-term effects beyond their immediate work environment. An alumnus talked about participation in EPFP as having an impact beyond organizational walls and extending their networks, *“[Colleagues] see you as having contacts and access that reaches beyond the organization. I got asked to [attend] more stuff outside and I started meeting and talking to more folks around the state.”*

The external visibility experienced by fellows in NC-EPFP turned into job transitions for some fellows, who are referred to as “climbers” in NC-EPFP. These fellows often go on to achieve bigger positions within their organization or in different organizations in the state. Some alumni credit EPFP with helping them achieve their later career goals, *“The program put me in touch with someone who later became a trusted friend and colleague. We built a bond that was sustained well beyond the program.”* The program also provided resources for an alumnus who ran for statewide office, *“I definitely had a better understanding of how things work in North Carolina and it made me feel confident about campaigning for a statewide position. It also gave me access to and knowledge of resources that I wouldn’t have had otherwise.”*

The learning and development experienced by the fellows during their participation in EPFP has implications for North Carolina as the ranks of alumni continue to grow in the state.

## Building State Capacity

Former superintendent Phillips’ vision for NC-EPFP remains a program priority today—increase the capacity of individuals who work in education. The curriculum introduces fellows to the many factors that influence education policy making in the state. The emphasis is non-partisan and every effort is made to bring in ideologically diverse speakers who represent the many perspectives in the state.

EPFP’s quality is closely linked to the reputation of its sponsoring institution. The Forum is one of the state’s most influential education policy organizations. Some fellows were quick to cite the Forum’s reputation as having an impact on the program’s success, *“The Forum is respected here and they aren’t beholden to anyone. They take stands on issues and they work across party lines to get things done.”* The Forum’s leadership is explicit about the barrier that exists between the Forum’s advocacy work and the work of EPFP, but the connections are not lost on some of the participants:

*“In a way, the Forum practices what they preach in EPFP. We all know what positions [the Forum] takes, but they don’t preach them during their sessions. If anything, they show us how to get things done by talking to as many people as possible and by building relationships with people in all sorts of places.”*

NC-EPFP is well-known and the Forum is able to leverage the EPFP network in its work on initiatives in a way that furthers discussion and action on policy initiatives in the state. The Forum’s recognition of the value of EPFP is evident in the support it provides to the program each year. Fellows’ sponsors pay the tuition of \$2,600 each year to the Forum; travel-related costs and release time to attend national meetings is an additional expense for the employer. Tuition dollars cover a variety of program expenses and provide support for the national conferences coordinated by IEL. Graves and Norris’s staff time are in-kind contributions, and the Forum consistently subsidizes the program, *“EPFP is a loss leader, but our board recognizes the value of the program and what it brings to the Forum.”*

The Forum’s continuing commitment to the program is not in doubt, but the coordinators acknowledge existing tensions as the cost of running the program increases:

*“There are several steps we could take to keep costs [down], but we don’t want to do anything that will diminish the program like getting rid of dinner. That would really change the atmosphere of the program. We also don’t want to raise prices so that the program becomes unaffordable for the sponsors. It’s difficult to find the balance, but we try to maintain.”*

For their part, alumni demonstrate their continued willingness and belief in EPFP by continuing to support participants in the program. Alumni who have gone on to occupy some of the highest education posts in the state report that, *“[EPFP provides fellows with an opportunity to] map their future with a realistic understanding of what is possible in the state. You can’t really put a dollar figure on that when you’re talking about what’s good for our kids.”*

### **EPFP in the Larger State Policy Context**

A commitment to public education is deeply embedded in North Carolina’s culture. The state, often hailed as progressive in addressing educational challenges, boasts a long history of activism from its executive and legislative branches of government. Despite, or perhaps as a result of its historical interest in education, a number of individuals discussed the need for increased policy-making coherence within the state:

*“Education policy in North Carolina tends to be random acts of practice with little coherence. EPFP’s role... is to help fellows understand and realize that that approach to policy will not yield the desired results. It connects people and helps them to understand how they fit together as part of a larger whole.”*

The personal and professional connections between participants in EPFP extend beyond the life of the program. Program alumni are invited to attend each year’s graduation, which also serves as a reunion for EPFP alumni and as an introduction to the new class of fellows who host the event. Held in the fall, the

activity gives alumni a chance to reconnect as a new class gets inducted into the fold. Alumni are often tapped to serve as program resources upon completion of the program—they come back to speak to the class, thereby deepening the connections across multiple fellowship classes.

### **Conclusion**

By all accounts, NC-EPFP is a thriving leadership development program. Each year, alumni choose to sponsor colleagues in the program. When queried, alumni point to the program’s long and consistent history of providing participants with an enhanced understanding of the state’s political culture and contemporary policy issues. They also point to the credibility and trust that develops among the participants across the program years:

*“EPFP brings people together around core understandings in education around the state. It helps them to see the bigger picture and it connects them in a way that may not happen when they are just working in their offices or in a particular branch [of the government].”*

The elements critical to North Carolina EPFP were present at its inception and continue to drive the program’s success. The *intimacy* first created by Crotts’s small, dinner meetings has flourished even as the number of fellows has increased over the years. The *impartiality* cultivated by the careful selection of diverse speakers is often cited as a strength of the program—providing participants with access to multiple viewpoints on complex policy issues. A third element, *institutional support*, has also promoted and enhanced NC-EPFP’s prosperity. The Forum’s substantial commitment to EPFP is reinforced by the support of other local agencies and organizations that continue to sponsor new fellows year after year. Strong and consistent leadership has ensured NC-EPFP’s stability and relevance over the past decades and positions it for continued success. ❖

**“EPFP brings people together around core understandings in education around the state. It helps them to see the bigger picture and it connects them in a way that may not happen when they are just working in their offices or in a particular branch [of the government].”**

—NC-EPFP



**NORTH CAROLINA—EPFP SPONSORING AGENCIES**

**PUBLIC SCHOOL SYSTEMS**

Alamance County Schools  
 Caldwell County Schools  
 Caswell County Schools  
 Catawba County Schools  
 Chapel Hill—Carrboro City Schools  
 Chatham County Schools  
 Clinton County Schools  
 Cumberland County Schools  
 Currituck County Schools  
 Greene County Schools  
 Durham Public Schools  
 Edenton Chowan Public Schools  
 Edgecombe County Public Schools  
 Franklin County School District  
 Gaston County Schools  
 Granville County Schools  
 Greene County Public Schools  
 Guilford County Schools  
 Halifax County Schools  
 Hickory Public Schools  
 Johnston County Schools  
 Jones County Schools  
 Lee County Schools  
 Lenoir County Public Schools  
 Moore County Schools  
 Nash—Rocky Mount Schools  
 NC School of Science and Math  
 New Hanover County Schools  
 Orange County Public Schools  
 Person County Public Schools  
 Pitt County Schools  
 Reidsville City Schools  
 Rockingham County Schools  
 Stanly County Schools  
 Union County Public Schools  
 Vance County Schools  
 Wake County Public Schools  
 Winston-Salem/Forsyth County Schools  
 Yadkin County Public Schools

**PRIVATE K–12 SCHOOLS**

Ravenscroft School

**COLLEGES AND UNIVERSITIES**

Appalachian State University  
 Duke University  
 East Carolina University  
 Guilford Technical Community College  
 Meredith College  
 Mitchell Community College  
 Mount Olive College at RTP  
 NC AT&T State University  
 NC Central University  
 NC State University  
 Sandhills Community College  
 Southwestern Community College  
 UNC—Chapel Hill  
 UNC General Administration  
 UNC—Greensboro  
 UNC—Pembroke  
 Warren Wilson College

**STATE AND FEDERAL AGENCIES/INITIATIVES**

Eastern NC School for the Deaf  
 NC Arts Council  
 NC Department of Administration  
 NC Department of Community Colleges  
 NC Department of Health and Human Services  
 NC Department of Human Resources  
 NC Department of Human Services  
 NC Department of Public Instruction  
 NC General Assembly  
 NC Humanities Council  
 NC Office of State Budget and Management  
 NC Senate  
 NC State Board of Education  
 NC Science, Mathematics, and Technology Center  
 NC Virtual Public Schools  
 Office of the Governor

**ASSOCIATIONS**

NC Association of Educators  
 NC Association of School Administrators  
 NC Citizens for Business and Industry  
 NC Federation of Teachers  
 NC Independent Colleges and Universities  
 NC Principals and Assistant Principals' Association  
 Professional Educators of North Carolina

**BUSINESSES AND FOUNDATIONS**

BB&T  
 Charlotte—Mecklenburg Education Foundation  
 Compass Consulting Group, LLC.  
 Educational Personnel Development Systems  
 Everett, Gaskins, Hancock, and Stevens, LLP  
 Hafer, McNamara, Caldwell, Cutler, and Curtner, P.A.  
 Warner Foundation  
 SAS Institute, Inc.

**RESEARCH AND ADVOCACY ORGANIZATIONS**

All Kinds of Minds  
 East Central Community Legal Services  
 James B. Hunt, Jr., Institute for Educational Leadership and Policy  
 LEARN NC  
 Legal Services of NC  
 Middle College National Consortium  
 NC Center for Afterschool Programs  
 NC Center for International Understanding  
 NC Child Advocacy Institute  
 NC Education Research Council  
 NC Justice Center  
 NC New Schools Project  
 NC Real Enterprises  
 Partnership for a Drug-Free NC  
 Public School Forum of NC  
 Southeast Center for Teaching Quality  
 SouthEastern Regional Vision for Education (SERVE)  
 Teach for America—NC  
 Visiting International Faculty Program

## PENNSYLVANIA EPFP: TIMING AND LEADERSHIP ARE EVERYTHING

*Taryn Mackenzie Williams, Research Coordinator, EPFP*

**T**he Pennsylvania EPFP (PA-EPFP) has achieved a great deal of success in a relatively short period of time. The program enjoys strong institutional support and has a stellar reputation in the state's education arena. Now entering its tenth year, the program has graduated over 220 fellows from all corners of the state. Despite this achievement, PA-EPFP faces challenges as its leaders work to keep the program affordable.

### Program History and Background

The history of Pennsylvania EPFP is coterminous with its host institution, the Education Policy and Leadership Center (EPLC) in Harrisburg. In the late 1990s, Representative Ron Cowell sought ways to continue his commitment to education upon his retirement from the Pennsylvania House of Representatives. A group of local foundations expressed interest in developing a center that would address the education research and advocacy needs of the state. Cowell engaged in conversations with colleagues he had come to know during his twenty-four-year tenure in the House, including Michael Kirst, cofounder of Policy Analysis for California Education (PACE) Center in California, and Michael Usdan, then IEL's president. Cowell, who spent many of his years as majority or minority chair of the House Committee on Education, decided that he would launch EPLC to meet the needs of education in the state.

Founded in 1998, EPLC's mission is straightforward. It is an independent, non-partisan, nonprofit organization with three distinct goals: (1) to provide research and information about education, (2) to advocate for education policy initiatives, and (3) to enhance leadership capacity in the education policy community. It is within the last strand that EPFP finds its niche. It has been a part of the Center's three-part strategy since EPLC's inception.

Cowell steadfastly develops and maintains a robust network of colleagues that he uses to advance the work of EPLC. One of his earliest acts was to hire

Sharon Brumbaugh, a long-time education leader in Harrisburg, to direct EPLC's leadership program and to co-coordinate PA-EPFP. Through their seven-year partnership, Brumbaugh and Cowell shaped and refined a program structure and curriculum that remains today. In 2005, Brumbaugh departed to work for the Pennsylvania Department of Education where she now serves as special assistant to the Secretary of Education. Robert Feir, a well-respected figure in the state, was identified to replace her. He had held leadership positions with the State Board of Education, the Senate Education Committee, and the Department of Education. Feir's professional expertise and personal relationship with Cowell facilitated a smooth transition and continued prosperity for the growing program.

Since its launch, Pennsylvania EPFP has recruited large numbers of participants from around the state. The cohorts, which average around thirty, feature fellows from local school districts, charter schools, the legislature, and the state department of education as well as other state agencies, local nonprofits, education associations, and the nearby U.S. Army War College (AWC). Cowell's strong relationships contributed to the PA-EPFP's early recruitment efforts, but subsequent cohorts cite the program's strong curriculum and reputation as a reason for their participation.

During the period September through June, the PA-EPFP convenes nine times for full-day seminars focused on major policy initiatives in the state such as school finance, the achievement gap, higher education, and standards-based education reform. The sessions often begin with presentations from content experts and policy makers. Fellows engage in large-group discussion, but continue the discussions in smaller learning teams. The learning teams are developed during the first seminar when fellows opt to join small groups (five to six fellows) based on shared policy interests. These teams meet during each session to work on large policy projects that are presented during the last session of the program.

The program's strong policy focus is combined with an approach to leadership that emphasizes fellows'

exposure to leaders around the state, rather than a particular leadership philosophy:

*“We do not ascribe to a particular leadership theory and do not administer leadership instruments. We include leadership by drawing upon the contributions of fellows—leaders in their own organizations, by introducing fellows to numerous leaders who present at both state and national EPFP meetings, by our strong relationships with the Army War College and its role in our opening retreat, and by our consideration of the following curricular areas: Developing Leaders—Concepts of Strategic, Operational, and Tactical Leadership; Managing Change for Strategic Leaders; School and District Leaders for a New Education Era; and K–12 Education Governance.”*

PA-EPFP’s institutional relationship with AWC, cultivated by Brumbaugh, is an oft-cited source of innovation for the program. Faculty members from AWC’s strategic leadership department participate in the program in order to increase their understanding of the challenges encountered by local educational systems. The entire cohort travels to AWC for a site visit that introduces them to the military’s approach to leadership development. The success of the PA-EPFP and AWC partnership is evidenced by its frequent mention by the alumni and by its replication by other EPFP sites. Fellows from the New York EPFP travel to AWC, and the reestablished Ohio EPFP site will begin traveling there in the 2008–09 program year.

## Individual Learning

Participants in the program spoke in great detail about their learning from the program. For many, the program highlights include a stronger grasp of Pennsylvania’s political culture and the intricacies of policy making within the state:

*“I would come back from the meetings with a better understanding of how to influence policy for the betterment of my students. It opened my eyes to what really works in terms of strategy for influencing Harrisburg. I have people in the program now and I can see them experiencing that new knowledge every time they come back from a session. The tenor of the conversation has changed.”*

Many alumni commented on an enhanced understanding of how education operates on a macro level in a state due to the comparative aspects of the curriculum. The AWC site visit was often cited as a catalyst for this new understanding:

*“Going to [the Army War College] was pretty powerful. I think a lot of us went in with preconceived notions of what they were doing up there, but after a few hours it was clear that the military has done a lot of thinking and work around developing leaders. It really helped us understand what some of the problems were and how it could help us in education.”*

Many participants also point to the intrinsic value of engaging in sustained dialogue with fellows who have diverse personal and professional backgrounds. The heterogeneity of each Pennsylvania EPFP cohort—fellows enter the program with careers that range from eight to thirty years—gives participants access to new ideas, experiences, and organizations:

*“It really helps you think about your own work when you are sitting around the table with folks that you normally don’t sit across from. The environment is different and there is a sense that you can really discuss some issues without penalty.”*

One alumnus talked about the program’s effect on his understanding of his position within the broader policy environment, *“It can be really easy to get bogged down in your job, in your issue, and you might not know why one [organization] acts this way and another does something else. The program helped me make sense of that.”*

## Career Development

The PA-EPFP program has existed for a short period of time and many of the alumni interviewed went through the program in recent years. Fellows were able to speak about some career impacts experienced as a result of participation in the program. Similar to individual learning, perceived career impact varied depending on fellows’ level of experience. Some early career professionals discussed a broadened understanding of their career options within the policy arena:

*“I got to see what was out there and it really helped me to crystallize what I wanted to do over the next five years in my career. I can’t say that I would have known*

*that I would be here if it hadn't been for some of the conversations that took place during EPFP."*

More established professionals spoke of opportunities to take on new and different responsibilities in roles that were internal and external to their positions:

*"It was almost like a halo effect. Getting nominated is a big deal, but then you start participating and coming back with new ideas that lead to one assignment or another... whether you want it or not you can become the "go-to" person on issues that weren't originally in your portfolio."*

As the program continues to grow, an increasing number of organizations boast large groups of alumni. A participant from an organization with a history of sponsoring individuals talked about emerging career implications, *"There is a whole group of us that have been through the program and, as the number increases, we're all much more willing to go to each other to collaborate on projects and issues."*

## Building State Capacity

PA-EPFP is firmly established in the state's ongoing efforts to strengthen the preparation and continuing development of educators. This is evidenced by alumni who hold prominent positions around the state, including the Deputy Secretary for Elementary and Secondary Education, Executive Director of the State Board of Education, the President and President-Elect of the PA Parent Teachers Association, President and Vice President of the PA State Education Association (PSEA), President-Elect of the Pennsylvania Association of School Business Officials, and others. The program is officially recognized as a provider of professional development under *Pennsylvania Act 48* which requires teachers and administrators to engage in 180 hours of professional development each year; EPFP counts as 120 hours. More recently, the state imposed additional professional development requirements on superintendents, assistant superintendents, principals, and assistant principals. These requirements are embedded in the Pennsylvania Inspired Leadership (PIL) program, which focuses exclusively on the leadership of in-school instructional improvement. EPFP does not qualify for PIL credits, but this seems not to have affected the participation of admin-

istrators in the program. In fact, PA-EPFP had the largest number of education administrators ever in its 2008–09 cohort.

In addition to the leadership development opportunities, fellows have also found opportunities to advance policy agendas as a result of their participation in the program. One alumna's policy team published their PA-EPFP policy paper and delivered several statewide presentations around the state.

## EPFP in the Larger State Policy Context

Pennsylvania's commitment to education is evident in its many progressive initiatives, but the system is not without challenges. Like many of its peers, the state is involved in a protracted battle to reform its education finance system—a significant undertaking in a state with 501 school districts with demographics that range from rural Appalachia to urban Philadelphia. Against this backdrop, the state continues to address many policy issues, including the continued implementation of the *No Child Left Behind Act*. The complexity of the issues confronting the state underscores EPFP's role. Participants often work for organizations with entrenched interests; the program gives them sustained opportunities to discuss issues with individuals outside of and across the boundaries of their employing organizations. PA-EPFP provides a unique opportunity not currently offered by other professional development programs in the state.

In spite of its contributions to the state, the program faces obstacles in keeping the program affordable. Similar to other EPFP sites, the program receives support from its sponsoring institutions. The EPLC tuition was \$2,750 for the 2007–08 program year—a figure that does not include travel-related expenses for the national conferences. Approximately 40 percent of the tuition dollars are sent to IEL for costs associated with the national component of the program. The remaining tuition dollars are used for meals, materials (e.g., flash drives with program materials), payments to cover the co-coordinator's salary (Ron Cowell's time is an in-kind donation), travel, and other miscellaneous expenses. The program receives in-kind contributions from other sources such as the Dixon Center, which provides rent-free meeting space

each month. EPLC subsidizes the program each year, however, in order to keep the program affordable for participants:

*“There are only so many options available for cutting the cost and each year we struggle when we set the tuition and determine our activities for the year. However, we can’t raise costs because the [sponsoring agencies] can only afford to pay so much towards professional development.”*

Cowell is adamant about the need to contain the cost of running the EPFP program and he constantly seeks ways to cut expenses. For example, the move to flash drives cut the time and expense associated with photocopying and collating the seven-pound binders that fellows used to receive at the beginning of the program year. The move is laudable, but Cowell acknowledges that more action may need to be taken to combat the rising cost of food. He believes the solutions lie in collective action between the local EPFP sites and IEL.

## Conclusion

EPFP has quickly evolved into a well-respected capacity building program for Pennsylvania’s educators. The program owes its success to many factors, but two emerge as essential—relationships and institutional support. In many ways, PA-EPFP is an embodiment of the founder’s (Ron Cowell) approach to effective policy making, an approach he shares with participants during the opening session, *“The folks who are successful [in Harrisburg] are likely to be successful because of their relationships.”* Cowell’s commitment to and understanding of the value of relationships has enabled EPLC to build a program that brings together diverse perspectives in pursuit of common goals. PA-EPFP also enjoys a strong, institutional commitment from EPLC, which continues to provide support to sustain the program at a time when educators are increasingly expected to do more with fewer resources. Despite the challenges inherent in an era of constrained resources, Pennsylvania EPFP is poised to enjoy a second decade of marked success. ❖

## REFERENCES

Covey, S. R. (1989). *Seven Habits of Highly Effective People: Powerful lessons in personal change*. New York: Simon and Schuster.

Gerzon, M. (1996). *A House Divided: Six belief systems struggling for America’s soul*. New York: Tarcher.

Hollister, D. (2007). *A Public Policy Primer: How to Get Off the Sidelines and Into the Game*, Washington, DC: IEL.

Taylor-Powell, E. (n.d.). *The Logic Model: A program performance framework*. Madison: University of Wisconsin, Cooperative Extension.

United States General Accounting Office. (1990, November). *Case Study Evaluations* (PEMD-10.1.9). Washington, DC.

**“There is a whole group of us that have been through the [PA-EPFP] program and, as the number increases, we’re all much more willing to go to each other to collaborate on projects and issues.”**

—PA-EPFP

**PENNSYLVANIA—EPFP SPONSORING AGENCIES**

**PUBLIC SCHOOL DISTRICTS**

Allentown School District  
 Apollo-Ridge School District  
 Berwick Area School District  
 Bethel Park School District  
 Brandywine Heights Area School District  
 Camp Hill School District  
 Coatesville Area School District  
 Columbia Borough School District  
 Council Rock School District  
 Corry Area School District  
 Derry Township School District  
 Downingtown School District  
 Eastern York School District  
 Fairfield Area School District  
 Forest City Regional School District  
 Garnet Valley School District  
 Harrisburg School District  
 Lampeter-Strasburg School District  
 Manheim Township School District  
 Mechanicsburg Area School District  
 Norristown Area School District  
 Northampton Area School District  
 Northwestern School District  
 Octorara Area School District  
 Palisades School District  
 Palmyra Area School District  
 Penn Manor School District  
 Pennsbury School District  
 Pocono Mountain School District  
 Pottsgrove School District  
 Quaker Valley School District  
 Radnor Township School District  
 School District of the City of Allentown  
 School District of Lancaster  
 School District of Philadelphia  
 Solanco School District  
 State College Area School District  
 Steel Valley School District  
 Sto-Rox School District  
 Saucon Valley School District  
 Southern York County School District  
 Tyrone Area School District  
 Unionville—Chadds Ford School District  
 Upper Adams School District  
 Upper Dublin School District  
 York Suburban School District  
 Warren County School District  
 Wayne Highlands School District  
 West York Area School District  
 Wilkes-Barre Area School District  
 Wilkinsburg School District  
 Woodland Hills School District

**PRIVATE K–12 SCHOOLS**

Milton Hershey Academy  
 Pace School  
 The Watson Institute

**PUBLIC CHARTER SCHOOLS**

Discovery Charter School  
 Imani Education Circle Charter School  
 Lehigh Valley Charter High School for  
 the Performing Arts  
 Ronald H. Brown Charter School  
 Universal Institute Charter School  
 Urban League of Pittsburgh Charter School

**INTERMEDIATE UNITS (I.U.)**

Berks County I.U.  
 Capital Area I.U. 15  
 Central Susquehanna I.U.  
 Chester County I.U.  
 Colonial I.U. 20  
 Lancaster-Lebanon I.U. 13  
 Montgomery County I.U.  
 Tuscarora I.U. 11

**COLLEGES AND UNIVERSITIES**

Alvernia University  
 Bucknell University  
 Carnegie Mellon University  
 Cedar Crest College  
 Chatham University  
 Cheney University of Pennsylvania  
 Clarion University  
 Community College of Allegheny County  
 Delaware County Community College  
 Drexel University  
 Duquesne University  
 Elizabethtown College  
 Gwynedd-Mercy College  
 Kutztown University  
 Lehigh University  
 Marywood University  
 Montgomery County Community College  
 Robert Morris University  
 Shippensburg University  
 Slippery Rock University  
 Saint Joseph's University  
 Saint Vincent College  
 Susquehanna University  
 Temple University  
 The Pennsylvania State University  
 The Pennsylvania State University—Harrisburg  
 The Pennsylvania State University—Lehigh Valley  
 The Pennsylvania State University—New Kensington  
 University of Pennsylvania  
 University of Pittsburgh  
 University of Pittsburgh at Johnstown  
 Valley Forge Military Academy and College  
 West Chester University  
 Westmoreland County Community College  
 Widener University  
 Wilkes University

**STATE AND FEDERAL AGENCIES/INITIATIVES**

American Education Services of the PA Higher  
 Education Assistance Agency  
 Office of State Representative Beverly D. Mackereth  
 Office of State Senator Anthony H. Williams  
 Pennsylvania Department of Education  
 Pennsylvania Dept. of Public Welfare  
 Pennsylvania Department of Treasury  
 PA Distinguished Educator Program  
 PA Higher Education Assistance Agency  
 Pennsylvania House of Representatives  
 PA Human Relations Commission  
 Pennsylvania State Board of Education  
 PA Training & Technical Assistance Network  
 Scotland School for Veterans' Children  
 Senate of Pennsylvania  
 U.S. Army War College

**ASSOCIATIONS**

Association of Pennsylvania State College and  
 University Faculty  
 PA Association of School Business Officials  
 PA Head Start Association  
 PA State Education Association  
 Philadelphia Federation of Teachers  
 U.S. Army War College Alumni Association

**BUSINESSES AND FOUNDATIONS**

Barton Educational Consulting  
 Cheryl A. Mobley and Associates, LLC  
 Falk Foundation  
 Grable Foundation  
 Mid-Atlantic Consortium of Education Foundations, Inc.

**RESEARCH AND ADVOCACY ORGANIZATIONS**

A+ Schools—Pittsburgh Community Alliance for  
 Public Education  
 Center for Schools and Communities  
 Comer Education Consulting Services  
 Future Connect  
 Good Schools Pennsylvania  
 Education Policy and Leadership Center  
 Education Voters PA  
 Keys2Work  
 Lehigh Valley Business/Education Partnership  
 Manchester Craftsmen's Guild  
 Montgomery County Child Care Consortium  
 National Foundation for Teaching Entrepreneurship  
 Northeast PA School District Health Trust  
 Pennsylvania PTA  
 Pittsburgh Tissue Engineering Initiative  
 The Lehigh Valley Discovery Center of Science and  
 Technology  
 United Way of the Greater Lehigh Valley  
 United Way of Southeastern Pennsylvania

## Leadership Development

### *Teacher Leadership In High Schools: How Principals Encourage It— How Teachers Practice It*

This report documents findings from a small study that confirms the contributions of teacher leadership and provides a picture of how principals rely on teacher leadership teams. It posits that the absence of a supportive policy framework that fosters empowering educators, the onus for creating change rests on principals and teachers.

### *Preparing Leaders for Rural Schools: Practice and Policy Considerations.*

This report provides field-based insights—not silver bullets, not research findings, and not final solutions—collected from people working in and familiar with rural places and rural schools. Based on authentic conversations, the report offers best, worst, and promising policy strategies and program practices that make a difference in rural schools.

### *Preparing and Supporting Diverse, Culturally Competent Leaders: Practice and Policy Considerations.*

This report shares views collected from individuals working in leadership development programs in urban, suburban, and rural schools districts. It identifies best practices for preparing school leaders who are themselves diverse, as well as others, and ensuring that all have the skills, knowledge, and attributes necessary for cultural competence.

### *Preparing and Supporting School Leaders: The Importance of Assessment and Evaluation.*

This paper documents best practices in assessing and evaluating school leadership programs and leaders. It provides the collective insights of a diverse group of individuals—those who run leadership preparation programs, evaluation experts, education researchers, and representatives from new leadership provider organizations. In addition, it identifies the eight themes that dominated the discussions and offers them as guidance for improvement.

### *Preparing School Principals: A National Perspective on Policy and Program Innovations.*

This study focuses on two areas in which state policies and programs can have particular influence on school leadership. The report distills the national conversation about school leadership and principal preparation programs and presents promising approaches and practices in and/or across state systems, in local school districts, in universities and colleges, and in new provider organizations across the nation.

### *Raising Graduation and College Going Rates: Community High School Case Studies*

This report highlights eight high schools that are succeeding because they couple strong, engaging, academic programs with an array of supports and opportunities for their students. These community schools are breaking the mold and demonstrating the power of community to support student success.

## Workforce Development

### *The 411 on Disability Disclosure: A Workbook for Youth with Disabilities*

Designed for youth, and adults working with them, to help them learn about disability disclosure, this popular workbook helps young people make informed decisions about whether or not to disclose their disability and understand how that decision may impact their education, employment, and social outcomes.

### *Guideposts for Success*

This important framework details what research says that all youth need, including youth with disabilities, to successfully transition into adulthood. It is designed to ensure that programs and policies are grounded in what all youth need to succeed.

### *Tunnels and Cliffs: A Guide for Workforce Development Practitioners and Policymakers Serving Youth with Mental Health Needs*

This guide provides practical information and resources for youth service professionals and policy makers to assist them in addressing system and policy obstacles and help improve service delivery systems for youth with mental health needs.

### *Negotiating the Curves Toward Employment: A Guide About Youth Involved in the Foster Care System*

This guide encourages collaboration between workforce development, child welfare, mental health, schools, and other community institutions to improve the chances for youth in foster care to successfully transition into adulthood. Readers will find facts and statistics, examples of states and communities that are changing policy and practices, and the *Guideposts for Success for Youth in Foster Care*.

### *Making the Right Turn: A Guide About Improving Transition Outcomes for Youth Involved in the Juvenile Corrections Systems*

This guide provides professionals involved with the juvenile justice system with well-researched and documented facts, evidence-based research, and promising practices. It also includes the *Guideposts for Success for Youth Involved in the Juvenile Corrections System*.

### *Paving the Way to Work: A Guide to Career-Focused Mentoring*

This guide is for individuals designing mentoring programs for youth, with and without disabilities, and provides information on why career-focused mentoring is one of the most important strategies for helping youth make a positive transition from school to work.

## School and Community

### *Raising Graduation and College Going Rates: Community High School Case Studies*

These case studies highlight the success of high schools that mobilize the assets of their communities to support student success. Moving beyond a narrow focus on academics, these community schools provide a comprehensive array of opportunities for their students.

### *Community Schools Evaluation Toolkit.*

The Evaluation Toolkit is a starter guide for community school staff to evaluate their efforts so that they learn from their successes, identify current challenges, and plan future efforts. It provides a step-by-step process for planning and conducting an evaluation at community school sites.

### *Community Schools across the Nation: A Sampling of Local Initiatives and National Models*

Community schools are alive and growing, serving millions of students across the nation. Today, there are a number of national models and local initiatives that create their own flavor of community school. This brief provides an overview of leading initiatives.

### *Community and Family Engagement: Principals Share What Works*

Principals are turning increasingly to the community to help them engage families, share resources, and meet standards. Informed by the work of principals, this paper finds six keys to community engagement that help school leaders engage families, staff, partners, and the larger community in the life of the school.

### *Growing Community Schools: The Role of Cross-Boundary Leadership*

Leaders from schools, cities, and counties across the nation are working together in new ways to “grow” community schools. This report profiles eleven communities where this work is taking place. These leaders are installing and increasing the number of community schools as quickly as possible, using a powerful vision with a clear focus on results and an effort to make the best possible use of all the assets their communities can offer.

### *Community-Based Learning: Engaging Students for Success and Citizenship*

This report makes the case that community-based learning addresses the problems of boredom and disengagement by involving students in real-world problem solving that is relevant and meaningful. This approach brings together a collection of teaching and learning strategies, including service learning, place-based education, environment-based education, civic education, work-based learning, and academically based community service.

## Ordering and Contact Information

Copies of this report are available for download at no cost from IEL's Web site. Requests for printed copies must be received in writing by fax, e-mail, or mail, and are subject to availability, plus a minimum charge of \$2.00 for shipping and handling. To order copies:

Institute for Educational Leadership  
4455 Connecticut Avenue NW, Suite 310  
Washington, DC 20008

Telephone: (202) 822-8405  
Fax: (202) 872-4050

E-Mail: [iel@iel.org](mailto:iel@iel.org)  
Web site: [www.iel.org](http://www.iel.org)

© 2009 by the Institute of Educational Leadership, Inc. All rights reserved. In the spirit of IEL's mission, this whole document or sections thereof may be reproduced in any way, along with the proper attribution to: Institute for Educational Leadership, Washington, DC. Written permission is not necessary, but we hope you will inform us of your use of this material, c/o [iel@iel.org](mailto:iel@iel.org).

ISBN 1-933493-35-6

