Dream of Change: Evaluating Postsecondary Career and Technical Education Programs of the Future

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Abstract

If leadership is defined by the ability to influence a group of people to achieve a shared goal, then a leader at the federal level must have a strong grasp of the complexities of the goal as well as a solid understanding of the nuances of the diverse stakeholders. A leader who neglects the wants and needs of any one stakeholder risks inefficient change efforts or worse, a failure to achieve the shared goal. The U.S. Department of Education, through the Strengthening Career and Technical Education for the 21st Century Act (Thompson, 2018), has sought to provide funding for Career and Technical Education (CTE) to meet the demand for high-skill, high-demand labor. Unfortunately, the dramatic shortage of labor effectively trained to meet these needs indicates that the system needs improvement. One significant aspect of the CTE ecosystem that could be improved is a clearer definition across states of who CTE students are, and the relevant data needed to determine whether local programs are meeting the needs or not. The leadership at the U.S. Department of Education hired me to engage the various stakeholders to paint a more robust picture of who CTE programs serve, and how local, state and federal economies benefit.

This comprehensive examination paper describes the process through which stakeholders were taken in order to identify the existing positives of the system, to create a shared vision for the future of CTE, and to innovate new and targeted systems for collecting and sharing data relative to the successful training of tomorrow's workforce. The paper will begin with a definition of the problem, which includes an analysis of various power dynamics. The proposed change initiative will be outlined using organizational change theory and a model for accountability. The paper will be concluded with a summary of the overall process and will

include reflections on the importance of theoretical foundations and model for complex change initiatives.

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Chapter 1- Introduction and Overview

Large scale social challenges require a great deal from leaders. The dual task of holding the complex goals of systems in dynamic environments in mind while simultaneously tending to the relationships with diverse stakeholders is sizeable. Wise leaders therefore anchor their work in frameworks and models that help to organize and classify the moving parts. By bringing the desired future into better focus in the minds of those with a stake in the challenge, the leader can also harness the creative energies of the range of stakeholder talents and resources. The goal of this paper is to discuss a leadership challenge at the level of federal education policy through the lens of my expertise as a stakeholder engagement consultant. I will also employ the theoretical knowledge and practical skills I have gained through my coursework as a Doctoral student in Organizational Leadership at Pepperdine University's Graduate School of Education and Psychology.

Historical Context

The economy in the United States is experiencing a labor shortage (Bartash, 2018; Cox, 2018; Gross & Marcus, 2018). The number of job openings, which has remained stable in the recent years, exceeds 6 million (U.S. Department of Labor, 2018). This shortage of labor spans many industries and is the concern of an array of trade groups (Associated General Contractors of America, 2017b; CareerBuilder, 2017). Affected employers point to revenue losses, diminished morale, and reductions in the quality of work as tangible ways these labor shortages affect them. The inability of employers to find suitably trained employees also affects the larger economy as well, in the form of an increase in the cost of labor (Associated Press, 2016; McCarthy, 2017). These costs built into the larger economic system in turn drive up the cost to consumers, resulting in a chain reaction felt across the world.

One likely reason for the shortage of labor is the insufficient supply of qualified, skilled labor (Carnevale, Strohl, Cheah, & Ridley, 2017). Though many of the jobs resulting from postsecondary CTE education offer good income, many young people are choosing traditional 4-year degrees over shorter CTE programs and certificates (Gross & Marcus, 2018). Historically, these programs have been perceived by both parents and students as having a lower status than 4-year and graduate degrees (Schwatrz, 2016). Though certainly the incomes earned by people with 4-year degrees and beyond are higher on average (Brundage, 2017), the rapid rise of student loan debt for generations of students calls into question the wisdom of this more traditional route. Still, existing avenues for training and education for these high-skill, high-demand jobs are underwhelming employers in some industries. In a survey of leaders within its ranks, the Associated General Contractors of America describe employers who are unhappy with existing training programs given their urgent needs (2017a). Though there is an outcry for things to improve, it is unclear to many parties involved who is ultimately responsible for fixing the issue.

These are the concerns of today, but there are others who are raising the alarm for the not-too-distant future as well. When surveyed, some experts who specialize in emerging technologies lacked confidence that existing structures for educating and training would effectively meet the needs of tomorrow's rapidly changing work environments (Rainie & Anderson, 2017). Business leaders are also beginning to calculate the cost of addressing proposed labor shortages in the United States and across the world (Korn Ferry, 2018). Some worry that existing economic inequalities will be exacerbated even further by disruptive technologies (Schwab, 2016). Equitable education systems that efficiently and effectively train workers to meet the demands of the future workplace are critically essential. The issue of funding for these programs of the future is of significant importance to postsecondary educators who have seen their budgets cut in years past, in spite of the mounting demand from business and industry leaders for well-trained labor.

The Carl D. Perkins Act of 2006 and more recent amendments seek to provide equitable access to relevant, high-quality training and education (Advance CTE, 2018a). Historically, CTE policy has aligned with the needs of the contemporary economy. In the early 20th century, it was a need for homemakers and farm workers; today the need is for skilled labor in health science or engineering and technology. Policy makers are tasked with ensuring that education systems are funded in a way that provides the economy with the needed labor. Of course, with the funds comes the expectation of accountability that monies are going to programs that are demonstrating success, especially for special student groups who are considered underperforming (Carl D. Perkins Career and Technical Education Act of 2006, 2006; Thompson, 2018). The latest reauthorization of the Perkins Act, known as the Strengthening Career and Technical Education for the 21st Century Act (Perkins V), includes an expectation of a comprehensive local needs assessment requiring an evaluation of local data and significant stakeholder input (Thompson, 2018).

In spite of this requirement for stakeholder input, it might still be unclear who is responsible for improving existing education and training systems. Industry associations point towards government and educational institutions, while educators and government leaders bemoan the lack of defined avenues for collaboration (Associated General Contractors of America, 2017a; Associated Press, 2015; U.S. Department of Education, 2012). Though a certain degree of flexibility exists within states to define workforce development programs per federal policy, this flexibility also results in a significant degree of ambiguity for establishing the necessary relationships amongst stakeholders on a local level. Efforts to coordinate amongst stakeholders require a great deal of effort and a shared understanding of the needs of all parties (Advance CTE, 2016; National Association of State Directors of Career Technical Education Consortium, 2013)

The Setting

This change initiative, known as "Success Stories", represents the efforts of an assortment of important stakeholders. The first group represented is a national consortium of CTE program leaders called Improve CTE. The organization is a non-profit whose vision is one wherein any student from any background or location can have access to meaningful work through either college or career. Members of this organization hail from across all U.S. states and territories. The organization seeks to support state level CTE leaders in their roles as visionaries for expanding and improving CTE programs in their states. In addition to identifying best practices for CTE programs, this group seeks to influence federal policy which reap maximum benefit to each learner. Though formerly operating under a different name, the organization has been in existence since 1920. Throughout those years, the goal has been to support CTE leaders across the country through advocacy and partnerships for innovative CTE programs against the backdrop of an increasingly global and dynamic economy.

The next major stakeholder group represented comes from another national organization whose mission is to provide education and workforce constituents with consistent and reliable access to data for program evaluation, research and other program-related insights. Founded in 1993, the organization is the result of leaders from within the higher education community seeking a cost-effective, safe and secure way to exchange and report student data. Roughly 3,600 higher education institutions are enrolled to be clients of the services provided by this organization. In addition to providing the data-related services, the organization also has a division that provides research on topics from program completion, current enrollments, enrollment trends, and persistence. As a significant part of the data sharing and reporting process in the United States, this group certainly has an interest in future changes to how data for students participating in CTE is collected and stored from state to state.

Another stakeholder group represented comes from postsecondary institutions offering CTE programs. Of particular concern for the educators from these institutions is that in the discussion of program effectiveness, the nuances and granularity of the individual students are lost. Large-scale data projects such as these require difficult choices and prioritization of data elements so as to avoid becoming too cumbersome. Therefore, it is essential that the voices advocating to keep the individual student in mind are present. Representatives from the postsecondary institutions are the closest to the students themselves and are therefore able to share stories of specific students that challenge overly general assumptions, which are a danger when designing a federal level system.

Yet another stakeholder group represents leaders from industry associations with a vested interest in the graduates of CTE programs. One such association is a large national association representing industry leaders in construction. It represents over 25,000 firms across the country who perform construction related services and has been in existence over 100 years. Because of the size of the organization's constituency, the association advocates and performs research on topics of interest to member firms. As a consumer of public data for determining the health of education and training pipelines for the industry, this association is interested in a more robust picture of who is enrolled in CTE courses and what is happening within those programs. As a trusted resource within the construction industry, these stakeholders ensure that the vision for student data systems for CTE are meaningful for employers.

Compelling Reasons for Change

By maintaining a data system that provides an incomplete picture of the learners themselves and their success, policy makers, business leaders, advocacy groups and educators are unable to effectively know who students are and what is motivating them in their pursuit of education and CTE-related training. Knowles would argue that to effectively plan for adult learning, educators must truly understand both the past experiences and current motivations to pursuing new knowledge and skills (Knowles, Holton, & Swanson, 2005). The postsecondary data that are missing from many state longitudinal data systems are data that would provide insight into previous experience and motivation of postsecondary CTE students. Examples of these are 1) occupation data, 2) data on participation in apprenticeships, and 3) certifications that are awarded by industry (Workforce Data Quality Campaign, 2016). An improved system for collecting, managing and sharing postsecondary CTE data would support policymakers because more robust data would support the decision-making process for funding programs across the United States. Educators in both workforce development programs and postsecondary institutions would benefit from better information on which programs are most effective for their target populations. Parents and students benefit from improved postsecondary CTE data systems because they would be able to make more informed decisions about where to invest their education dollars relative to the likelihood of success and of obtaining meaningful careers in the future. Finally, researchers benefit from improved postsecondary data systems because they can better determine if programs are indeed benefiting all students, including disadvantaged students.

My Role

I have been asked by the Assistant Secretary for Career, Technical, and Adult Education to work in conjunction with a collection of stakeholder groups to cultivate the soil for change through a focused effort to explore the stories of current postsecondary CTE programs. With a consciousness of effective system leadership (Senge, Hamilton, & Kania, 2015), this group will surface hidden narratives, challenge assumptions, and explore creative possibilities for revisions to state longitudinal data systems (SLDS) across the United States. Improved data systems will provide all stakeholders with the information needed to make informed decisions. SLDS will also ensure equitable access to participation in CTE programs for vulnerable populations. I have been asked to guide all relevant stakeholders through a process rooted in Appreciative Inquiry, to foster an environment of trust and generative dialog across broad stakeholder boundaries. The Success Stories initiative will be one piece of the larger change initiative picture for CTE program funding at the federal level, this essential component will be the catalytic energy for further change efforts.

Though opportunities for improvement have been discussed in years past by former education secretaries (U.S. Department of Education, 2012), the pressure on the labor markets caused by the continued shortage in specific sectors has created more urgency recently to update old systems for funding CTE programs (Cox, 2018; Lifschutz, 2018). With the rapid evolution of technology and the forecasted shift in many sectors of labor, CTE programs must become even more nimble at responding to the needs of local employers. The Assistant Secretary for Career, Technical, and Adult Education is confident that I can bring my years of expertise working in conjunction with various stakeholder groups on behalf of target populations in education. From the early parts of my career, I have worked with and on behalf of stakeholder groups representing teachers, administrators, county and state officials, parents, and the students themselves. With change efforts such as these, the work of fostering a shared vision which galvanizes the energies of people from various sectors of society is a particular kind of leadership that takes a firm grasp of theories of change management and an agile and flexible use of best practices. The Assistant Secretary for Career, Technical, and Adult Education recognizes these qualities in me and is confident that I can help move these groups forward in a shared design of data systems for CTE programs.

Organization of the Paper

The paper has been organized to provide an overview of the challenge and then continue on through various layers of analysis to better describe a complete picture of the need for change as well as my contribution within the change initiative. Chapter 2 explores the driving forces behind the challenge using the SPELIT Power Matrix to identify the most salient drivers of the challenge, therefore allowing for more targeted dreaming and designing (Schmieder-Ramirez & Mallette, 2007). Chapter 3 will describe my personal leadership traits and style as it relates to a challenge of this nature. By humbly and frankly considering my strengths and opportunities for growth I can provide support in purposeful ways and allow the strengths and expertise of others shine more effectively. Chapter 4 discusses key theoretical underpinnings through which organizational change are framed. In this way, change efforts can be better informed as bridges are formed via the shared wisdom of past leadership researchers and practitioners. These mental models foster flexibility and adaptability to new and dynamic leadership circumstances. Chapter 5 outlines the plan for fostering a shared vision for improved data systems which includes a more robust understanding of who CTE students in the postsecondary setting really are. Chapter 6 further breaks down the elements of the plan, this time through the lens of Appreciative Inquiry (Watkins, Mohr, & Kelly, 2011). To ensure that the change efforts are effective, a model for evaluation will also be utilized as an anchor during the execution of the plan (McChesney, Covey, & Huling, 2012). Chapter 7 evaluates the plan for organizational plan, with mention of both the strengths and areas to pay particular attention.

Chapter 2- SPELIT Power Matrix

In order to develop a more robust picture of the components of this change initiative, I used the SPELIT Power Matrix so that the initiative's efforts are better targeted to the existing challenge and the contexts in which it exists. I chose the SPELIT matrix over other models for analyzing environmental strengths and weaknesses because it provides more layers through which the environment can be evaluated. By having a more thorough appreciation for the nuances and possibilities within the challenge, the plan for change can be increasingly intentional about the human strengths and weaknesses inherent in the system (Schmieder-Ramirez & Mallette, 2007, p. 4). The SPELIT tool results in a brief but powerful overview of key drivers for an organizational change opportunity. The SPELIT acronym stands for social, political, economic, legal, intercultural, and technological. These are the various lenses through which the analysis is conducted. Certainly before any change work is done it is important to conduct a careful analysis of the environment (Schmieder-Ramirez & Mallette, 2007).

Social Environment Analysis. The social component of the SPELIT pays particular attention to the network of social connections that form the community within the organization (Schmieder-Ramirez & Mallette, 2007). This includes the degrees of awareness, both of self and others, the degree to which relationships are a focus, and the degree to which service is a part of the organizational purpose. A good deal of what is important socially to an organization can be observed via the artifacts that characterize the environment of an organization (Schein, 2009).

These kinds of artifacts can be seen in the events worthy of celebration, the type of dress worn, and the degree of proximity any member within the organization has to those in positions of power. By evaluating the diverse social environments represented by this change effort I will have a better understanding of the power dynamics at play throughout this initiative.

The stakeholder groups present within this change effort represent widely different organizational cultures. Historically, efforts to align data systems and collection practices have been difficult because of a lack of trust between states to handle each other's data effectively and safely (Workforce Data Quality Campaign, 2016). In a change effort that relies on cooperation across public agencies at both the federal and state level, the need for trust is crucial. In addition, not all stakeholder groups have the same level of motivation to address the problem. People representing the academic sectors might have a distrust of efforts to evaluate programmatic success through overly narrow definitions because they have more proximity to students whose stories of success do not fit within a defined category. These stakeholder groups might have some experience working collaboratively for other change initiatives focused on improving systems for workplace data, but chances are they do not. It is safer to assume that the various representatives have little to no prior interaction with each other. This will mean that the change plan should account for some relationship building to establish the social networks needed to execute the change. The foundations of these relationships will be rooted in the shared desire to invest in the individuals who make up the current and future workforce, the CTE students.

Political Environment Analysis. The political lens is the one through which the SPELIT analyses the competing values and interests within an organization (Schmieder-Ramirez & Mallette, 2007). By unpacking the driving forces of internal and external power, the political dynamics become more evident. Power has been conceptualized by French, Raven, and

Cartwright as having five bases which include *reward power* (the power of conferring some type of gain), *legitimate power* (the power of a recognized authority), *coercive power* (the power of punishment), *referent power* (the power of self-identification with the leader), and *expert power* (the power of education or expertise) (French & Raven, 1959; Raven, 2008). Understanding the political environment of an organization is understanding the power dynamics. Political forces can appear to be in a constant state of change, but there is also an organizational need to maintain existing balances of power both inside and outside the organization. An organizational change agent would be wise to approach the political environment before implementing any plans.

The stakeholders represented in this change effort all hold expert power, as they are all ambassadors for their stakeholder group. The leaders from the state CTE programs, the leaders from the industry association, the leaders from previous data systems improvement efforts, the educators from secondary institutions all come with a high degree of expertise about the environments within their respective spheres. In the case of the state CTE leaders and the industry association groups, these leaders also hold legitimate power as they hold positions within their organizations that enable them to represent the interests of their constituent groups. Another power at play within this group can be reward power, as stakeholder groups can make promises of future support and collaboration in efforts of mutual benefit. Likewise, coercive power could be utilized if stakeholder groups threaten to withhold support for future challenges requiring collaborative efforts. Many of these stakeholder groups also participate in lobbying for policy at the state and federal level that aligns with their interests. Generally, this collaboration amongst these stakeholders is positive as all parties recognize improved secondary data collection and sharing as a benefit to the larger system of workforce development. However, there are gaps in the capacities of different state governments to participate in the data sharing system because of their inability to respond to data requests with the clean and properly packaged data required by the larger system (Workforce Data Quality Campaign, 2016).

Table 1. *Political Drivers for CTE Data Systems Improvement Stakeholder Engagement Plan*

Driver	Driving Force 1	Driving Force 2	Driving Force 3
Political	Stakeholders are motivated to present a better picture of who students in CTE programs are, complete with their work and education experiences and their financial well-being	States have differing resources and political will for investing in state longitudinal data systems.	Industry associations, CTE advocacy groups, and data quality workgroups have existing political advocacy funding and personnel to inform relevant policymakers of benefits to the economy and to society at large of improved data systems

Economic Environment Analysis. The economic component of the SPELIT environmental analysis tool allows the user to determine the economic conditions affecting an organization (Schmieder-Ramirez & Mallette, 2007). In this model the factors of most importance are the factors that affect the organization's ability to operate, including the factors of production and consumption. This would generally include a thorough review of an organization's assets, income, and liabilities. Certainly, when considering the economic environment, it is wise to consider both microeconomic and macroeconomic factors. At the microeconomic level, the various stakeholder groups are committing resources in the form of their representative's time, the cost associated with travel and lodging for in-person collaboration events, and the allocation of future funds to support lobbying efforts regarding related policy at the state and federal level. The U.S. Department of Education is providing meeting spaces and assorted materials for the stakeholder collaboration events. Additionally, The U.S. Department of Education is providing personnel resources for the purpose of documenting and disseminating the summary of all stages of the collaborative effort. This effort will not function as an addition to the regular function of these stakeholder groups, but instead will provide a meaningful location and focus for efforts that are happening in parallel to each other within each group's sphere of influence.

At the macroeconomic level, the United States' labor shortage means lost profits across many industries. The Associated General Contractors Association, for example, notes delayed project times, and increased costs to the client when sufficient labor is not available (Associated General Contractors of America, 2017a, 2017b). Leaders from other industries list lost revenue, declining customer satisfaction, and increased costs to consumers resulting from insufficient labor supply (CareerBuilder, 2017). Industry leaders acutely feel the economic implications of failing to bolster and improve CTE programs in postsecondary institutions. Education leaders also recognize the larger economic factors when waning interest from policymakers means reductions to state and federal CTE budgets. Without a clearer picture of who benefits from CTE programs at the postsecondary level and how, programs risk losing the necessary funds needed to deliver quality learning opportunities for students and adequately skilled labor for high-demand markets (Compton, Laanan, & Starobin, 2010).

Legal Environment Analysis. Continuing on to the next component of the SPELIT power matrix, the legal environment is analyzed within an organization. This entails an analysis of all relevant policies, procedures and codes that affect the environment in which the organization operates. These may be internal policies as well as external policies (Schmieder-Ramirez & Mallette, 2007). It is not enough to merely consider the laws and regulations. The intended goal of the policy must also be considered. This is particularly important in the case of ethical challenges. The law is the means by which modern societies struggle over social resources and social values" (Feinman, 2014, p. 6). Understanding this tension and struggle helps create a richer picture of the values at the heart of the organizational challenge as well.

Beyond the interest of program leaders and the business community, the current policy that determines how federal funding will be allocated to CTE programs is known as Perkins V. Adopted in 2018, policymakers continue to seek better systems for accountability for how these dollars are spent . The basic goals of this policy are to provide relevant "academic knowledge and technical and employability skills" in "preparation for high skill, high wage, or in-demand occupations in current or emerging professions" (Carl D. Perkins Career and Technical Education Act of 2006, 2006; Thompson, 2018). Over time, calls for increased accountability have arisen over what some perceive to be misguided uses for the funds (Simoneau, 2015). As a result, the latest iteration of the Perkins Act has continued to make adjustments to how states define and measure participation in their local CTE programs to ensure that monies are being spent on behalf of target populations for programs that are future-oriented and locally relevant (Advance CTE, 2018b). Most of the stakeholder groups present have legal consultants who are familiar with the federal policies governing their spheres of influence. As such, the groups present are familiar with the limitations and opportunities inherent with current the current Perkins V. While Perkins V stipulates that states define and measure their program enrollment and success, this change effort will seek to foster alignment from one state to the next in what data is stored and how by generating a better understanding of CTE students and the complex postsecondary system that educates them.

Intercultural Environment Analysis. The next component of the matrix addresses the intercultural environment. An organization's culture is defined by the shared values, meaning, and beliefs that characterize the behavior and actions amongst the organization's members. Intercultural competence is defined as the ability to effectively interact with those of other cultures (Schmieder-Ramirez & Mallette, 2007). Differences in cultural communication styles were examined by Hofstede (1980) to define significant values held among countries and their cultures such as power distance, masculinity versus femininity, uncertainty avoidance, and individualism versus collectivism. Though his work was rooted in comparisons conducted across national boundaries, the values defined as a result of his work are helpful nonetheless in analyzing communication styles amongst organizations. It is increasingly important to consider cultures and even subcultures within organizations for differences such as gender, ethnicity, race, religion, and sexual identity to ensure that communication is effective and engenders feelings of inclusion during the change process.

The stakeholder groups each represent distinct cultures. Even within the groups there are different cultures, as can be the case with national organizations. These differences will need to be consciously addressed through the actions of this change effort. This awareness of stakeholder culture differences will also be important since the representatives themselves are not necessarily an accurate representation of the group which they represent. As an example, the members of the national consortium of CTE leaders are nearly 95% White, and over 56% female. Meanwhile CTE students at the postsecondary level are significantly more diverse with over 19% of students in CTE programs being Black, non-Hispanic while another 18% identify as Hispanic. The gender distribution is better aligned, with over 59% of CTE postsecondary students being female. Ultimately, differences in cultures of those present for this change effort must be acknowledged and respected, as well as the differences that exist between the stakeholder groups and the CTE students for whom these efforts exist.

Technological Environment Analysis. The last component of the SPELIT power matrix considers how members of the organization strategically utilize technology to accomplish their mission (Schmieder-Ramirez & Mallette, 2007). Leaders of organizational change efforts must bring into focus not just attributes like cost and efficiency but mission-related attributes like future increases in service quality or marketing. The SPELIT environmental scan allows a user to assess for readiness for change through consideration of overall organizational goals, the level of buy-in from relevant stakeholders, and the existing infrastructure. In the case of this particular organizational change effort the mission goals, such as continuously improving the quality of service to student and employers, must be remain in the foreground of all collaborative efforts. Where issues of cost might have been a prohibitor to real progress in the past, this effort will seek to foster innovation and creativity with a more thorough analysis of the possibilities within the environment. The SPELIT environmental scan will be a very helpful tool for the efforts of this group.

Though some states have been working to clarify defining measures of success for postsecondary students (California Community Colleges, 2018; Digital Futures & California Community Colleges, n.d.), the efforts to create measures of success from one state to another are inconsistent (Gonzalez & Lee, 2018). Though states are intended to have a high degree of autonomy to develop programs that work best for their constituents, with an increasingly interconnected global economy these patchwork solutions to defining and measuring CTE student success creates obstacles to meaningfully improving or celebrating local programs (U.S. Department of Education, 2012). Efforts to identify gaps from state to state, and from agency to agency have attempted to clarify how these systems could become better aligned (Workforce Data Quality Campaign, 2016, 2019). In spite of this clarity, however, some states lack the infrastructural resources and manpower to address all of the existing gaps in the immediate time frame. For example, not all data sets have common identifiers necessary for databases to create the powerful snapshots needed by policymakers, business leaders and postsecondary administrators to evaluate existing CTE programs. This will require leadership from the various stakeholder groups in this change effort to identify one or two focus goals that will yield the most impact in the near term (McChesney et al., 2012).

Table 2. *Political Drivers for CTE Data Systems Improvement Stakeholder Engagement Plan*

Driver	Driving Force 1	Driving Force 2	Driving Force 3
Technology	States have differing abilities to collect, manage, and distribute their data	The Workforce Data Quality Campaign has identified gaps across states' student longitudinal data systems in the categories of postsecondary data, workforce program data, and employment data.	Data sets do not all have common identifiers making it very difficult to match data sets, particularly for states who lack the infrastructure required accurately and efficiently.

Chapter 3- Personal Leadership

According to Cashman, authentic leadership "is about acknowledging our talents and strengths while facing our underdeveloped, hidden, or shadow sides of ourselves" (2008, p. 34). In order to effectively lead others, it is important to invest time and energy into discovering one's whole self, soberly and with humility. Though different leadership styles will fit different organizational challenges, having a strong sense of self-awareness enhances a leader's ability to adapt their style according to the requirements of the environment (Goleman, 2000). Even more explicitly, self-awareness "means having a deep understanding of one's emotions, strengths weakness, needs, and drives (Goleman, 1998, p. 17). In light of the value of self-awareness for leaders, I have sought out different tools to help me better understand my personal values, traits, strengths and weaknesses. Though at times this work can feel vulnerable and can require a great deal of honesty and courage (George, Sims, McLean, & Mayer, 2007), I desire to be an authentic leader known for her integrity, emotional intelligence, and selfless pursuit of the common good. To this end, I have utilized two assessments and a framework for guided reflection. An overview of all three are described in this chapter.

Dominance, Influence, Steadiness, and Compliance Survey (DISC) Results

The DISC assessment is one tool that leaders can use to better foster self-knowledge (Everything DiSC, 2000). The feedback from the DISC survey provides insight into how a leader functions in the context of the workplace, as a colleague or as a subordinate. By knowing one's behavioral preferences, one can better facilitate productive problem resolution. Equipped with the knowledge of preferred natural behaviors, as well as adapted, less dominant behaviors, leaders can navigate challenging dynamics with a greater understanding of themselves and others (Bonnstetter, 2014). To be an effective leader, it is important to not only identify personal strengths and weakness, but to also identify correlating strategies for the demands of dynamic work contexts (Target Training International, Ltd., 2017).

The results from the DISC assessment tool that I utilized suggest that my behavior preference for my Natural Style is Supporting Relater, while my Adapted Style is Relating Supporter. The top five behaviors I exhibit in my natural style are 1) I identify and fulfill customer expectations, 2) I frequently engage and communicate with others, 3) I build rapport with a wide range of individuals, 4) I perform predictably, and 5) I can rapidly shift between tasks (Target Training International, Ltd., 2017, p. 19). The value I bring to an organization is that 1) I am a dependable team player, 2) I am service-oriented, 3) I have a positive sense of humor, 4) I build good relationships, 5) I am optimistic, 6) I build confidence in others, and 7) I am people-oriented (Target Training International, Ltd., 2017, p. 4). Though my natural style and my adapted style are not the same, when it relates to challenging problems or to interactions with people my natural style and adapted style are aligned. Understanding how I operate with people in the context of challenges is particularly important when working to bring diverse stakeholders into alignment around a unifying positive vision. However, it is also important for me to have my weaknesses in mind when approaching this organizational challenge so that I can employ strategies that will ensure success.

Myers-Briggs Type Indicator Assessment Tool

The Myers-Briggs Type Indicator (MBTI) assessment will provide an individual with information about his or her personality preferences, and insight into the kinds of work environments that will align with those preferences (The Myers & Briggs Foundation, 2019). To build and cultivate high-performing teams, there is a need to understand the individuals that compose those teams. Understanding team members personality preferences can go a long way to building cohesion and synchronicity (Kroeger, Thuesen, & Rutledge, 2002). In addition to understanding the cultural values of an organization, it can help to understand how those within the organization prefer to work as a tool to generate motivation around challenging tasks (Myers & Myers, 2010; Nahavandi, Denhardt, Denhardt, & Aristigueta, 2013). Originally developed as a tool to help people identify their Jungian type as a way to support the war effort during World War II, now the MBTI has becomes a way for individuals to better navigate the tumult of day-to-day life which includes the workplace (Quenk, 2009).

The results of a Jungian-type based assessment finds that I am categorized as Introverted (69%), Intuitive (52%), Feeling (64%), Judging (61%), also known as INFJ (NERIS Analytics Limited, 2019). Further categorized as an Advocate personality type, which is considered rare, I see helping others as my purpose in life. It is easy for me to make connections with people and my talent is to talk to people in warm sensitive language, using human-terms. I am described as insightful, inspiring, creative, determined, and passionate (NERIS Analytics Limited, 2019). I would be wise to remember that I have to have a cause behind the work in which I engage and that I can be a perfectionist. This can leave me vulnerable to burning out. Keeping these things in mind will help me engage in work that will not have an overnight solution, and in which I will face many bureaucratic hurdles, like the Success Stories initiative. Still, these assessments infuse me with confidence that I am equipped for this work. My personality and behavioral preferences align very well with this challenge.

Chapter 4- Organizational Leadership Style

Working with stakeholders around public policy-related challenges necessitates a kind of leadership that connects well with people from diverse backgrounds. Leaders in these situations must keep the core values of the policies in mind as well as the authentic needs and desires of the people groups those policies affect. Where stakeholder input is a required part of the process, as is the case with current federal education policy, leaders of engagement efforts must possess a certain amount of agility in unpredictable circumstances and a solid grounding in organizational change frameworks. In the case of this change effort, this holds true. The stakeholder representatives come from very different operational contexts. The constituent groups to which these stakeholder leaders answer have dramatically different day-to-day concerns. Therefore, as a leader I will have to keep the focus of our efforts trained on where the groups overlap. I will need to center all of our activities on postsecondary CTE students and how the current system of defining success for these students is insufficient. At the same time, I will need to facilitate clarity for each stakeholder leader in terms of how they are contributing in this initiative, both within this group and within their spheres of influence. In light of my behavioral and personality preferences, the needs of the organizational challenge, and the level of complexity of the social systems involved, the leadership style to which I align the closest are transformational leadership and system leadership

Transformational Leadership

Transformational leadership is a style of leadership that is focused on values-based goals, ethics, and emotions (Northouse, 2018). It is a form of leadership that takes into account the motivations and needs of followers, with an interest in inspiring followers to exceed their own expectations. Transformational leaders foster innovation and creativity through charisma and motivational visions of the future. The actions of the transformational leader are in pursuit of both the long-term goals and the continued enabling of followers to reach their highest potential (Bass & Stogdill, 1990). In contrast to the transactional leader who interacts with followers on an exchange model, the transformational leader raises the levels of aspiration of followers, ultimately turning these aspirations into political demands (Bass & Stogdill, 1990). The four behaviors thought to be primary amongst transformational leaders are:

1. Idealized influence.
2. Inspirational motivation.
3. Intellectual stimulation.
4. Individualized consideration (Avolio, Waldman, & Yammarino, 1991).

The behaviors of authentic transformational leadership align particularly well where the issue at hand is achieving the “common good of the organization, while at the same time meeting the needs and safeguarding the rights of the various stakeholders” (Bass & Steidlmeier, 1999, p. 200).

System Leadership

System leaders are known for their ability to see the larger system of a challenge, to foster generative conversations amongst diverse stakeholders, and to shift the focus away from problem-solving and towards a co-created future (Senge et al., 2015). Being able to foster consciousness of mental models and to question the related assumptions for various stakeholder groups within a community is crucial for creating the safe space necessary to collectively innovate (Senge, 1990). In order to be an effective system leader, it is helpful to be able to recognize patterns of interdependency and to visualize the future (Senge, 2006). It is also essential that a developing system leader pass through three “gateways” on their journey to becoming a system leader:

1. Re-direct attention so that stakeholders understand external and internal problems are part of the same system
2. Re-orienting the space for change to become a place for collective intelligence and wisdom to emerge
3. Practice, practice, practice, because learning and doing are the same and ultimately developmental (Senge et al., 2015, pp. 30–31).

System leadership is a particularly helpful framework through which to approach challenges that are complex and that span stakeholder boundaries. As a theoretical foundation, system leadership demands that participants in change cultivate their ability to listen to and inquire into different viewpoints (Senge, 2006).

Chapter 5- Organizational Development

Having completed an analysis of both historical challenges and the existing power dynamics using the SPELIT matrix, it is evident that this challenge requires a leadership with a system-based approach. For an organizational challenge with a high degree of complexity such as measuring the accountability of postsecondary CTE programs across the United States, an effective plan must actively engage leaders from very different backgrounds who all have a stake in the success of future workforce development. Though efforts to mobilize constituents according to priority issues for each stakeholder group have occurred in the past, this plan seeks to align the energies of diverse stakeholders to focus advocacy work on behalf of necessary improvements to how postsecondary CTE data is collected, stored and shared within state longitudinal data systems. The following stakeholder engagement plan was developed specifically to employ a system leadership approach.

Stakeholder Engagement Plan

The plan was developed to 1) summarize the goals of the plan, 2) identify the stakeholder groups essential for this work, 2) provide an overview of the history of the CTE data related challenges, 3) provide an outline of planned activities for exploration and execution, 4) describe the timeline for this change initiative, and 5) define the systems for accountability. The stakeholder engagement plan is further defined in Appendix B. The initiative has been called “Success Stories” because the efforts to bring about changes in how postsecondary CTE data is stored and shared will be rooted in shared stories of career and technical training that highlight what is working on behalf of students and the industries who hire them. The participants in the Success Stories initiative will represent diverse stakeholder groups in order for the group to better understand the CTE system as a whole, how their respective piece contributes to the bigger picture, and how the whole benefits from ready access to clean, robust data regarding workforce development. There will also be an articulated system of accountability for participants who will need to share with policymakers their learnings gained as a result of the Success Stories project. By including this system of accountability future participants will have a more accurate appreciation for the momentum generated by this early stage of the Success Stories initiative. Having clarity and structure for the stakeholder engagement plan will also ensure that efforts remain focused in spite of the myriad challenges these stakeholder leaders deal with in their primary roles within their respective industries. This project will require 5 days of face-to-face time over the course of a year while bi-weekly accountability meetings will occur online. These details can be found in Appendix B. After the first year, the Assistant Secretary for Career, Technical, and Adult Education and the stakeholder leaders will analyze the plan for any improvements or modifications necessary to continue additional years of the Success Stories initiative.

Chapter 6- Change Theory and Practice

It is foolish of leaders to neglect the history of an organization. To effectively understand an organization, a change agent must explore the many layers of what makes the organization work (Senge, 1990). Careful attention must be paid to the values and goals of the various communities that comprise the organization in order to discern what drives behaviors, decisions, and policies (Schein, 2009). In this way, as a leader of change in this scenario, I will be quick to listen so that I can establish a norm of authentic understanding of all the viewpoints represented. I will work to foster open and honest conversations which generate possibilities based on real opportunities. I will encourage creativity and innovative agency. I will be mindful of boundaries as indicators of what values each stakeholder seeks to protect, but I will foster collaboration across those boundaries so that powerful networks can be built in service of the common goal of improved SLDS for postsecondary CTE programs. I will implement clear systems of score-keeping and accountability so that participants will maintain their stamina over the duration of this project. The following theories of leadership help to clarify my own thinking and to better focus my personality and behavioral preferences as a leader of change in the Success Stories initiative.

Appreciative Inquiry

Appreciative Inquiry (AI) is a framework for organizational change that focuses the minds of those involved on a hopeful and positive vision of the future (Cooperrider, Whitney, Stavros, & Fry, 2008). The theory asserts that organizations offer a landscape of opportunity that should be embraced by harnessing the power of inquiry. The five foundational principles of AI help take this principle from theory to practice; The Constructionist Principle, the Principle of Simultaneity, the Poetic Principle, the Anticipatory Principle and the Positive Principle. *The Constructionist Principle* states that meaning and knowledge amongst humans are socially constructed. This means that for leaders of change, there must be a relentless pursuit of more and more layers of understanding through the various discourses within an organization. *The Principle of Simultaneity* acknowledges that change and inquiry cannot be treated as separate entities. The questions that arise as a result of inquiry are a manifestation of the discourse within an organization or a community and should be honored as such (Fifolt & Lander, 2013). *The*

Poetic Principle recognizes the dynamic nature of the stories that are told within an organization. These collective stories of the past, present, and future are rich resources for "learning, inspiration, or interpretation" (Cooperrider et al., 2008, p. 42). *The Anticipatory Principle* contends that the collective vision of the future within an organization or community drives the behaviors today. The power of the change will be directly correlated to the inspirational and innovative qualities of future expectations. The final principle, *the Positive Principle*, explicitly calls for conscious efforts to foster hope, joy, creativity, collaboration and good-will. This takes work, since the human mind is conditioned to more quickly notice the negative (Rozin & Royzman, 2001). In the end, this focus on the positive aspects of the aspirational future state is what promotes sustainability of the change effort

Define: Clarifying the project. This phase of AI, popularized by Watkins, Mohr, and Kelly (2011), establishes what the organizational goal is and the roles and responsibilities of those that will be involved. It is the phase in which the contract is historically negotiated between the organization's leadership and the AI consultant. The Define phase establishes clarity for both the organizational leadership and the consultant about the necessary training and support the participants will need to successfully contribute to the change initiative (McGoldrick & Tobey, 2016). For this phase of the change initiative, I met with the Assistant Secretary for Career, Technical, and Adult Education to determine which stakeholder groups would be important to include. It is recognized that this project will not likely result in direct improvements to any state longitudinal data systems. However, through a coordinated effort to collect aspirational stories of the past, present and future of postsecondary CTE students and the workforce that employs them, policy makers will be overwhelmed by the hopeful nature of the vision the narratives create. The goal is a rising tide of positive energy directed at the further funding of these data collection and sharing efforts across the United States.

Discover: Appreciate that which gives life. This phase of AI, where the storytelling begins, seeks to unpack the times of organizational excellence. This phase is explicitly focused on "what is" (Watkins et al., 2011, p. 87). Participants share personal accounts that illustrate the values that are embodied in the aspirational vision (Fifolt & Lander, 2013). These stories begin to paint a picture of how the community desires to move forward. The collective sharing of these stories infuses hope and connectedness within the community. Since these stakeholder leaders represent vastly different communities, it is crucial to create the sense of connectedness amongst those involved for this change effort. By focusing on the phenomenon of being well-trained and highly-skilled, and of having recognition from employers within the industry in which one works, the participants will recognize the themes that connect participants as human beings. The participants will also be trained to conduct AI interviews back within their respective networks. This will be a generative exercise of collecting even more layers of connection to the hopeful vision for postsecondary CTE programs evaluation and accountability.

Dream: Envisioning impact. In the Dream phase of AI, the efforts are focused on collectively envisioning a future of possibility for the organization (Cooperrider et al., 2008; Watkins et al., 2011). Participants in the change effort articulate the bold potential of the organization by reflecting on the mission, the core values and the unique ways in which the community can make a difference in the well-being of others. It is often in these times of courageous future-casting that stories from the organization's past are seen with new eyes as a part of an honorable and worthy journey (Watkins et al., 2011). This is a crucial element of AI that will hopefully breathe new life into a community of people who have long been advocating for the interests of their respective groups. By examining how the personal stories are woven into a larger compelling narrative on behalf of postsecondary CTE students, participants in this stakeholder effort will recognize their unique contributions, and the meaningful contributions of those within their representative organizations. More importantly, these stories will be directly tied to a powerfully ambitious future vision for postsecondary CTE student data and the state longitudinal data systems.

Design: Co-constructing the future. The result of the Design phase is called the possibility statement, which captures the specifics of the infrastructure required to bring the dream into reality (Watkins et al., 2011). Many times, the Dream phase and the Design phase can happen almost simultaneously because the strategy and the organizational behavior required to achieve that strategy unfold along with the possibility of what could be. While this phase is co-constructed by members of the organization as in the Dream phase, the Design phase is focused on *how* the organization will function en route to the desired future. For this change initiative, the goal is fostering a more holistic definition of students and their related data in CTE postsecondary programs in the minds of policy makers and the general public via the various participating stakeholder groups. The stakeholder leaders will need to understand their role as novice practitioners of AI within their environments. These leaders will also need to understand the new structure of collecting and sharing these powerful stories to the communities of which they are a part.

Deliver: Sustaining the change. This phase of the AI process seeks to bring to fruition the positive visions and possibility statements of the previous phases (Watkins et al., 2011). The Delivery phase is continuous and characterized by a cycle of iterating, sharing, and learning. This is the phase where the co-creation of innovative solutions comes to life (Cooperrider et al., 2008). Here, change participants will engage in dialogue, sometimes reconsidering initial possibility statements based on new learnings resulting from interviews or other new data. At the root of this work is a high level of consciousness of the shared values of the organization or community. This phase is purposeful about including new participants to the process so that the innovative energy is not lost. In the case of Success Stories, the purpose of the cycles of dialog will be both to share what is being learned from the interviews occurring within each stakeholder's network and will also be to revisit the foundational purpose of the initiative itself. One of the operational challenges our group will face is how to synthesize the qualitative data the group is collecting. This will be a large amount of interview data that will need to be shared with local, state and federal level policymakers. The Delivery phase will be a time for Success Stories participants to generate new and innovative means of sharing the learning occurring within this community with relevant decision-makers.

The 4 Disciplines of Execution

In order to hold the participants of the Success Stories initiative accountable to collect and share the stories of CTE , the 4 Disciplines of Execution (4DX) are employed alongside the framework for AI. The 4DX framework will be used in tandem with the AI process so that participants will be clear on how the success of the change effort will be measured. The four disciplines of 4DX are 1) focus on the wildly important, 2) act on lead measures, 3) keep a compelling scorecard, and 4) create a cadence of accountability (McChesney et al., 2012). Too often, important long-term change initiatives lose steam because leaders can become consumed by the urgent day-to-day challenges. McChesney et al. refer to the energy needed to deal with the urgent details that are required for daily job functions as the "whirlwind" (McChesney et al., 2012, p. 6). For the stakeholder leaders of the Success Stories initiative, there will be a real challenge to stay focused on the goals of the initiative when faced with the myriad responsibilities of their day-to-day jobs. The 4DX framework will establish the means for measuring success and the routines of reflecting and celebrating the group's accomplishments.

Wildly Important Goals. The 4DX framework acknowledges that a person can only do one thing really well at any given time (McChesney et al., 2012). Therefore, a main tenet of 4DX is that an organization should strive to accomplish only one or two wildly important goals (WIGs). It is crucial that organization leaders prioritize the one or two goals that will have the greatest impact right now and to find the courage to say no to other challenges within the whirlwind. Leaders must continuously invest the organization's resources toward accomplishing the goals regardless of new and compelling possible goals. Having clarity of organizational WIGs in turn allows groups within the organization to better craft their own WIGs which will ensure the main WIGs are accomplished.

This will not be the first effort to improve SLDS from a national level. Other advocacy groups are attempting to update and revise SLDS to better inform policymakers and the public about what is working in postsecondary education. The Success Stories initiative seeks to have an enduring impact because of its focus on the co-created vision of future SLDS across the country. The WIGs of the Success Stories initiative will be focused first on collecting and disseminating the learnings of the Success Stories participants and second on the increased funding for SLDS improvement efforts. The Success Stories participants all have primary job functions, with their own respective whirlwinds to tend to. By staying very focused on the Success Stories WIGs, stakeholder leaders will better understand how their efforts within their respective networks contribute to accomplishing the overall goals of the initiative.

Act on lead measures. This discipline of 4DX translates the WIG into specific targets that can be measured (McChesney et al., 2012). These targets clarify the actions which will have the most leverage in achieving the WIG. In contrast to a lag measure which is the data available after the action has occurred, the lead measures provide predictive data about the likelihood the goal will be accomplished. A lead measure can be influenced whereas a lag measure cannot. In order to be an effectively written lead measure, it must be *both* predictive and influenceable. Though most leaders will focus a great deal on the important lag measures for their industry, the 4DX framework encourages leaders to act on lead measures instead. When written well, the lead measures should provide the necessary assurance that goals will ultimately be met by strategically engaging levers of influence.

For the Success Stories initiative, the WIGs will focus on 1) disseminating a robust picture of postsecondary CTE students and their educational data, and 2) increasing the state-level funding dedicated to improving SLDS. The lead measures that will drive the Success Stories initiative will focus on the number of interviews conducted by stakeholders and then the number of opportunities to share the findings of the group with policymakers and within the stakeholder networks. These opportunities to share the finding from the Success Stories project will make clear the goals of the initiative but they will also help disseminate the creative visions for the future for SLDS cocreated by Success Stories participants.

Table 3. *Success Stories Metrics*

Measures	**Metric**	**Evaluation Frequency**	**Goal**
Lead Measures			
Network Interviews	Interviews	Monthly	15
Policymaker Meetings	Policymakers	Monthly	25
Industry Presentations	Presentations	Monthly	5

Lag Measures			
Increase in funding to SLDS	Dollars	FY 2021	15% increase
Robust understanding of current postsecondary CTE data needs	Interviews		200

Keep a compelling scoreboard. According to McChesney et al. (2012), organizations play differently when someone is keeping score. A visual representation of where the organization is and where it should be inspires collaborative problem-solving and "*compels* action" (McChesney et al., 2012, p. 66). To be an effective scoreboard it must be simple, with only the data relevant for keeping track of progress towards the WIG. It must be easily seen by everyone on the team. A scoreboard must also include both the lead and lag measures relative to the WIG. Finally, organizational members must be able to recognize whether they are winning or losing, at any time, relative to both measures. For the Success Stories initiative, a scoreboard is a challenge because the participants will not be in the same physical location on a regular basis. However, by creating a single virtual scoreboard that will be updated regularly and by creating notification emails that go out daily, the team will be alerted of progress by other participants. Our group will not be the first to tackle a project remotely. Working remotely poses many challenges specifically in terms of developing a scoreboard that can still be visible and compelling in spite of the whirlwinds that threatens to distract stakeholder leaders. The scoreboard will be a component of this plan that I expect to be revised as we collaboratively find a solution that works for the whole group.

Create a cadence of accountability. By creating a routine around reviewing progress towards a WIG, a leader reinforces the sanctity of the goal and the efforts taken to achieve those in spite of the whirlwind (McChesney et al., 2012). Not only does this weekly routine of checking in keep the WIG in the forefront of the organization's conscious, it underscores the unique contributions of all members of the team. A leader's responsibility is to protect this time, as well as to maintain the consistency of the routine. For the Success Stories initiative, our WIG meetings will take place synchronously online. Each stakeholder group will first report out about their progress towards commitments made from the previous meetings. These commitments will be in service of meeting the WIG and making the lead measure move. Secondly, the stakeholder leaders will review the scoreboard for the purpose of learning from what has transpired. Finally, stakeholder leaders will collectively problem solve and make new commitments for the next few weeks. It is recommended that these meetings occur weekly (McChesney et al., 2012). However, this group will meet on a bi-weekly basis.

Finally, the Success Stories initiative will end with a final event to celebrate and reflect upon what the group has accomplished. Over two days, the group will share how the experience has affected their sense of the challenge to collect, store and share postsecondary CTE data that is relevant to stakeholders and policymakers. In addition, the group will reflect on where future efforts to collect and share stories of success for CTE programs could be focused. The product of these two culminating days will be a road map for future years of the Success Stories project.

Chapter 7- Conclusion

Many parties have worked over the years to ensure that the citizens of the United States have access to high-quality, relevant career and technical training. Early policymakers saw the value of educating and training working class youth in the agricultural and industrial careers they were likely to attain (Imperatore & Hyslop, 2017). Today, the need to provide training and education on the knowledge and skills of current and future jobs is still prominently on the minds of business leaders, parents, CTE program administrators and the students themselves. The Success Stories project does not endeavor to affect change without acknowledging the many efforts on the part of CTE stakeholders to improve the quality of offerings, the access to vulnerable populations and the alignment between the skills of CTE graduates and the needs of local economies. Instead, the Success Stories project seeks to bring about a deeply robust understanding of today's CTE students and their respective programs from the collaborative efforts of stakeholders who might not otherwise have the opportunity to work together for change.

Based on the findings of a SPELIT environmental analysis, it was determined that an effort to co-create a positive vision of what improved SLDS could do for various stakeholder groups which could then be communicated to policymakers would translate into the funding necessary to improve the SLDS across the country. The current political climate for investing in CTE programs is improving based on the sustained shortage of skilled labor in the U.S. economy. However, it will take visionary, transformational leadership tied to a system-level understanding of CTE students and their related educational and employment data to effect enduring change which will benefit all CTE stakeholders. Grounding the efforts of the Success Stories project in the framework of Appreciative Inquiry will result in messaging from stakeholder leaders to policymakers of an aspirational future that spans the traditional stakeholder boundaries. By featuring the stories of students and the promise of a robust economy that benefits from their postsecondary CTE, investing in technology infrastructure improvements will hopefully be an easy choice.

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Appendices

Appendix A: Timeline of Stakeholder Engagement Plan

January	2019	Meeting with Assistant Secretary for Career, Technical, and Adult Education to discuss the stakeholder engagement plan to address aligning postsecondary CTE student data definitions across states and their related data captured in state longitudinal data systems
February	2019	Contracted as consultant to spearhead the stakeholder engagement process
		Performed environmental scan to determine driving forces (SPELIT)
May	2019	Consultant: Develops training presentations, draft interview protocols
June	2019	Stakeholder Leaders introductory training to Appreciative Inquiry
		Developing WIG Collect, Lead Measures, Scorecard
July-August	2019	Consultant + Stakeholder Leaders: Bi-weekly WIG Meetings
		In-person meeting to present synthesis findings from respective industry/interest groups/networks
		Distill findings into salient narratives (including relevant media) to be shared with local, state, and federal level policy makers

		Develop WIG Share, Lead Measures, Scorecard
September-May	2019-2020	Consultant + Stakeholder Leaders: Bi-weekly WIG meetings
June	2020	Celebration of Progress, Revisit the Dream

Appendix B: Stakeholder Engagement Plan

Overview

A collaborative effort to better define the stories of success of today's students for tomorrow's workforce.

Efforts to improve student longitudinal data systems (SLDS), including how postsecondary CTE students are defined within the data, have been ongoing. Leaders from different sectors have long recognized the challenges in adhering to federal accountability expectations based on the diverse needs of students pursuing CTE coursework. Current SLDS lack certain data on students that would better describe how and where these students are receiving the training needed to be employable in today's economies. The efforts to improve these SLDS require funding and visionary leadership on the part of CTE educators, the business community and policymakers. The Success Stories initiative is based on the belief that the momentum needed to tackle this data challenge will be found in the stories of hope, of success and of triumph of CTE students across the country. By capturing these narratives with the support of the Appreciative Inquiry framework, Success Stories leaders will be able to distill the qualitative data into compelling reasons for policymakers to take the bold step of preparing local SLDS for the future.

Participants will collect stories from across the stakeholder spectrum which explore the following topics:

- The Highly-Skilled Worker for Today and Tomorrow
- Readily Accessible Knowledge of What is Working

- Optimal Systems for Storing, Sharing and Reporting Data

Roles

The following roles will be essential for the Success Stories project.

Stakeholder Engagement Consultant

The stakeholder engagement consultant will lay the necessary foudnations for the Success Stories project to meet its ambitious goals of capturing stories of CTE student success to be shared with local, state, and federal policymakers. She will provide the initial training in Appreciative Inquiry which will be the guiding framework for the efforts of this project. She will also facilitate in-person and virtual meetings designed to collect and synthesize the learnings, collaboration, and inovation derived from the Success Stories project. Finally, she will support the development of key takeaways and the plans to continue the Success Stories project into future years.

Stakeholder Leaders

The stakeholder leaders have been carefully selected to represent a diverse cross-section of the parties affected by current CTE postsecondary programs. This includes leaders from CTE postsecondary institutions of education, state-level CTE program directors, business leaders and data managers familiar with current SLDS across the United States. These leaders will be trained and tasked with engaging in Appreciative Inquiry interviews with appropriate candidates within their respective networks. They will be responsible for attending all necessary trainings, conducting interviews, synthesizing their learnings with other stakeholder leaders, and sharing compelling narratives with targeted local, state, and federal level policymakers.

General Project Timeline

Phase One: June to August 2019 will be focused on understanding and implementing Appreciative Inquiry-style interviews of CTE students and their experiences with a focus on the insufficiencies of the current SLDS. Qualitative data, aspirational action statements and ambitious visions for SLDS improvements will be synthesized and distilled.

Phase Two: September to June 2020 will be focused on sharing learnings and compelling narratives with relevant policymakers. Meetings will occur to share stories of connections made based on goals set for each stakeholder leader.

Agendas

The following agendas for the activities planned for this project are below. Though there will be limited face-to-face time for this distributed project, progress on the project will be maintained via bi-weekly virtual meetings to maintain the energy and enthusiasm for the Success Stories goals.

June 2019
Day 1 Agenda: Project Purpose and Goal Setting

I. Introductions and Stage Setting (5 minutes)
  a. State the purpose for this meeting.
  b. Introduce stakeholder engagement consultant.

II. Brief Introduction to AI (15 minutes)
  a. What is AI, and what are its origins.
  b. Key Terms: Appreciative and Inquiry
  c. Examples of how AI has been used for system leadership

III. Mini-interview (45 minutes)
  a. Set up the process by reading the following questions:
    i. What would you describe as being a peak experience or high point in your journey to acquiring the necessary training and education for your career?
    ii. What do you value most about your skills and knowledge? your work? your industry?
    iii. What is the most impactful aspect of your education and experience that is captured in a database?
    iv. Describe your vision of the future of how CTE progam participation data supports your career, your organization, and your world?
  b. Allow 20 minutes for each person to interview his or her partner.

IV. Debrief Interviews and Dream Question (20 minutes)
   a. What was the interview experience like?
   b. What new things did you learn? What surprised you about the answers to these questions?
V. Break (10 minutes)
VI. More about AI (60 minutes)
   a. Introduce the Five Principles of AI
   b. Discuss the 4D Cycle
   c. Review the interviews just conducted and discuss their relationship to Discovery.
VII. Proposed Process for CTE Data collection, storage and sharing redesign (45 minutes)
   a. Current state of SLDS highlighting major gaps
   b. Discuss assumptions.
   c. Discuss preliminary project plan.
VIII. Discussion and Decisions (45 minutes)
   a. Discuss potential challenges within the process.
   b. Discuss timelines
   c. Discuss selection of interviewees.
   d. Close with revisit of purpose and expectations.
   e. Discuss any potential other issues.
IX. Lunch (75 minutes)
X. Overview of project targets (30 minutes)
   a. Lag measure: Increased investment in state longitudinal data systems
   b. Lead measures:
      i. AI interviews
      ii. Policymaker meetings/presentations
XI. Systems for capturing qualitative data (30 minutes)
   a. Best-practices for recording data
   b. Expectations for sharing electronically
XII. Collaborative Strategizing (60 minutes)
   a. Becoming familiar with relevant policymakers
   b. Utilizing networks effectively
XIII. Wrap-up—Next Steps? (15 minutes)

Day 2 Agenda: Practicing the AI Interview

I. Site visit to local postsecondary CTE institution (2 hours)
   a. Meeting interviewing local CTE leaders
   b. Meeting and interviewing local CTE students
II. Discussion of findings (30 minutes)
   a. What left an impression from what you heard? Where were the successes?
   b. What surprised you?
III. Lunch (60 minutes)
IV. Exploring possibilities (2 hours)

   a. Which elements from the morning would likely have the most impact with policymakers?
   b. How can the successes be leveraged within data systems?

V. Wrap-up Next steps (30 minutes)
   a. Upcoming WIG meetings, protocols
   b. Personal goal setting

WIG meeting Agenda (Ongoing)

I. Reporting on commitments (10 minutes)

II. Learning from successes and failures (10 minutes)
   a. What were the successes?
   b. What were the opportunities for growth?

III. Removing obstacles and making new commitments (10 minutes)

August 2019
Day 3 Agenda: Synthesizing and Distilling, Dreaming and Designing

I. Connecting and Setting the Stage (45 minutes)
   a. State the purpose of the day
   b. Highs and Lows of the journey so far

II. Findings from discovery (45 minutes)
   a. Themes of success
   b. Surprises

III. Break (15 minutes)

IV. Describing the dream (30 minutes)
   a. “Ideal SLDS will capture the following…”

V. Bringing the dream into reality (60 minutes)
   a. How the stories connect with the gaps in SLDS
   b. Prioritizing the gaps based on the collected success stories

VI. Lunch (60 minutes)

VII. Distilling the message (60 minutes)
   a. Identifying the most effective messages
   b. Connecting the stories to powerful visuals

VIII. Strategizing for sharing (60 minutes)
   a. Identifying key events
   b. Collaborating efforts to share
   c. Setting personal goals

June 2020
Agenda 4

I. Connecting and Setting the Stage (45 minutes)

a. State the purpose of the day
b. Highs and Lows: Key Takeaways from each person's experience

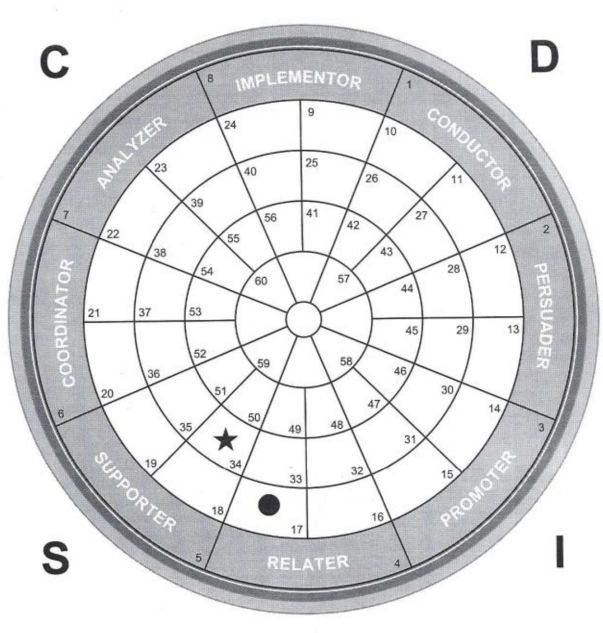
II. Reviewing and celebrating (60 minutes)
  a. Lead measures
  b. Lag measures
III. Break (15 minutes)
IV. Reviewing the original goals (45 minutes)
  a. Where did you think this was headed?
  b. How did this go relative to your expectations?
V. Lunch
VI. Identifying the most compelling narratives (2 hours)

Agenda 5

I. Cocreating a vision for Success Stories (60 minutes)
  a. Where does the gap exist based on what we have learned
  b. Who's stories should be heard
II. What have we learned about getting the message out? (60 minutes)
  a. Which strategies were most successful?
  b. What strategies could be adopted?
III. Break (15 minutes)
IV. Sharing the compelling narratives (45 minutes)
  a. Publishing/producing
V. Lunch (60 minutes)
VI. WIGs going forward (60 minutes)
  a. Lag measures
  b. Lead measures
VII. Conclusion (45 minutes)
  a. Most impactful takeaways
  b. Final thoughts

Appendix C: DiSC Assessment Tool Results

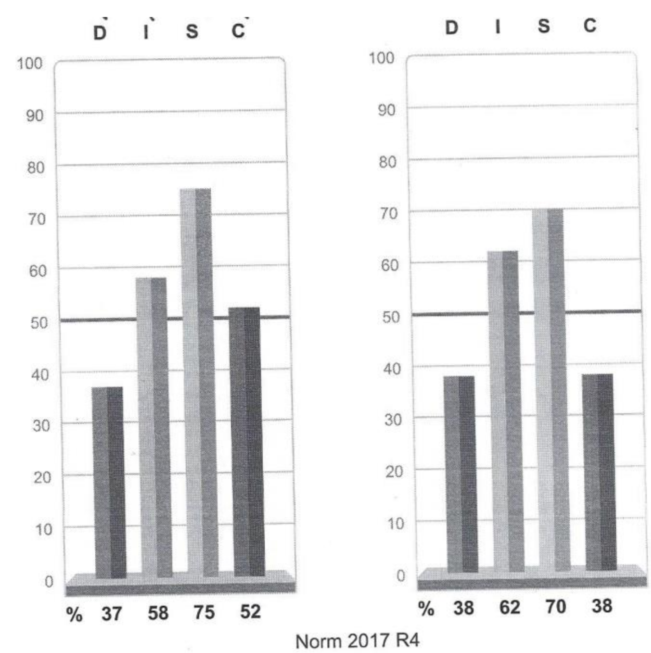
Wheel



Adapted (Star): Relating Supporter (Flexible) (34)

Natural (Circle): Supporting Relater (17)

Graphs



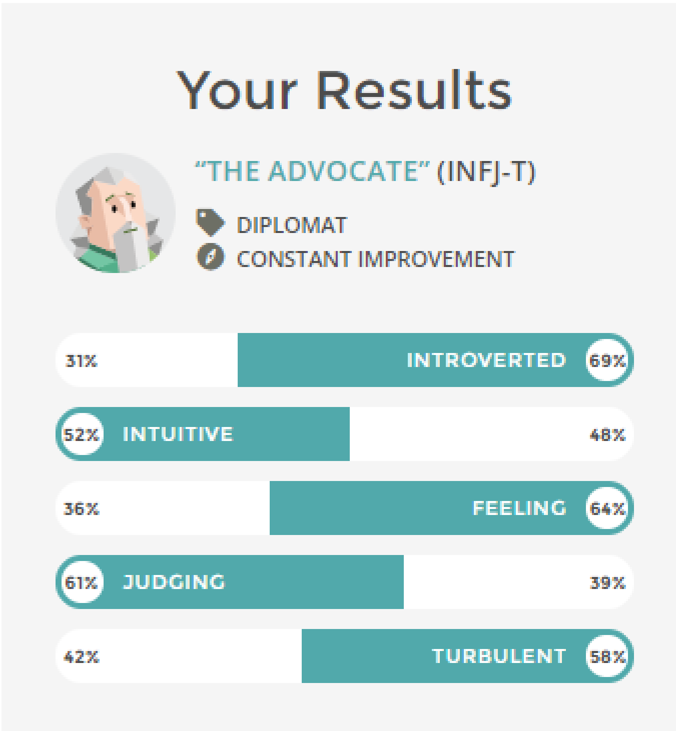
Descriptors

Driving	Inspiring	Relaxed	Cautious
Ambitious	Magnetic	Passive	Careful
Pioneering	Enthusiastic	Patient	Exacting
Strong-Willed	Persuasive	Possessive	Systematic
Determined	Convincing	Predictable	Accurate
Competitive	Poised	Consistent	Open-Minded
Decisive	Optimistic	Steady	Balanced Judgment
Venturesome	Trusting	Stable	Diplomatic
Dominance	**Influencing**	**Steadiness**	**Compliance**
Calculating	Reflective	Mobile	Firm
Cooperative	Factual	Active	Independent
Hesitant	Calculating	Restless	Self-Willed
Cautious	Skeptical	Impatient	Obstinate
Agreeable	Logical	Pressure-Oriented	Unsystematic
Modest	Suspicious	Eager	Uninhibited
Peaceful	Matter-of-Fact	Flexible	Arbitrary
Unobtrusive	Incisive	Impulsive	Unbending

Source:

Target Training International, Ltd. (2017). *Management-Staff, TTI Success Insights*.

Appendix D: MBTI Assessment Tool Results



ADVOCATE PERSONALITY (INFJ, -A/-T)

The Advocate personality type is very rare, making up less than one percent of the population, but they nonetheless leave their mark on the world. As members of the Diplomat Role group, Advocates have an inborn sense of idealism and morality, but what sets them apart is that they are not idle dreamers, but people capable of taking concrete steps to realize their goals and make a lasting positive impact.

Advocates tend to see helping others as their purpose in life, but while people with this personality type can be found engaging rescue efforts and doing charity work, their real passion is to get to the heart of the issue so that people need not be rescued at all.

ADVOCATE STRENGTHS AND WEAKNESSES

Advocate Strengths

- Creative
- Insightful
- Inspiring and Convincing
- Decisive
- Determined and Passionate
- Altruistic

Advocate Weaknesses

- Sensitive
- Extremely Private
- Perfectionistic
- Always Need to Have a Cause
- Can Burn Out Easily

Few personality types are as passionate and mysterious as Advocates. Your imagination and empathy make you someone who not only cherishes their integrity and deeply held principles but, unlike many other idealistic types, is also capable of turning those ideals into plans, and executing them.

Yet Advocates can be easily tripped up in areas where their idealism and determination are more of a liability than an asset. Whether it is navigating interpersonal conflicts, confronting unpleasant facts, pursuing self-realization, or finding a career path that aligns well with your inner core, you may face numerous challenges that at times can even make you question who you really are.

Source: NERIS Analytics Limited. (n.d.). INFJ Personality ("The Advocate"). Retrieved February 8, 2019, from http://www.16personalities.com/infj-personality

Appendix E: Pepperdine University Course List for the EDOL GAP Program

Course	**Description**	**Professor**	**Term**
EDD 700	Leadership Theory & Practice	Farzin Madjidi	Fall 2017
EDD 755	Virtual Learning & Collaboration	Lani Fraizer	Fall 2017
EDD 759	Law and Dispute Resolution	Gregory McNair	Fall 2017
EDD 724	Ethical Leadership, Cultural Proficiency	Farzin Madjidi/Cornell West	Spring 2018
EDD 765	Organizational Change, Innovation & Creativity	Kfir Mordechay	Spring 2018
EDD 767	Qualitative Research Design & Analysis	Kay Davis	Spring 2018
EDD 754	Global Economics & Public Policy	Farzin Madjidi	Summer 2018
EDD 766	Quantitative Research Design & Descriptive Study	Linda Polin	Summer 2018
EDD 763	Learning Design, Cognition & Evaluation	Elio Spinello	Fall 2018
EDOL 714	Organizational Behavior, Theory & Design	Kent Rhodes	Fall 2018
EDOL 734	Inferential Statistics	Cameron Sublett	Fall 2018
EDOL 764	Consultancy	Ron Stephens	Fall 2018

Appendix F: Originality Report