Masters of Complexity

Schools and systems of schools are multifaceted, diverse environments. Ensuring academic success for all students requires leaders with new and expansive traits and skills.

For the last 10 years, 100% of graduates from Boston Collegiate Charter School in Dorchester, Massachusetts, have been accepted into college. The school’s diverse 650 students come from all 13 Boston neighborhoods and represent all income levels but find a common denominator in academic success. In 2012, every single student scored “advanced” in math on the challenging Massachusetts State exam.

The school’s significant and sustained success is the result of the hard work of the school’s staff and the leadership of Shannah Varón, an Education Pioneers alumna who has served as Executive Director since 2011. A former teacher who also holds an MBA from Harvard and has consulting experience with The Parthenon Group, Varón describes her leadership style as one with both a business mind and an instructional heart and credits effective management and her capacity to recruit, build, and inspire a team of high-performing teachers for the school’s success.

Varón’s story is like other successful education leaders who, with extraordinary vision and skill, have achieved breakthrough outcomes for all students.¹

Schools and systems of schools are multifaceted, diverse environments with significant challenges—including limited budgets, numerous stakeholders with conflicting priorities, bureaucratic barriers, and immense pressure for student outcomes²—that demand extraordinary leadership.
Recent research on next-generation leadership has focused on the new traits business, government, and nonprofit sector leaders need to thrive in a competitive, global economy, but to date, these traits have not yet been analyzed for specific applications to education.

What does an extraordinary education leader look like? How does he/she lead to mitigate and overcome challenges to maximize student success?

Analyzing recent research on what makes leaders successful in an increasingly complex world, along with anecdotal evidence from three Education Pioneers alumni who currently work in complicated education environments, Education Pioneers has identified five underlying traits that together define a “master of complexity”—that is, a leader at any level within an education organization who ensures academic success for all students.

**MASTERS OF COMPLEXITY**

1. **Think of the whole picture, not just an individual piece, regardless of role**

2. **Know and appreciate what others value and need for success**

3. **Rely on diversity as the means to higher quality decisions and outcomes**

4. **Nurture and leverage a wide-ranging personal network from different groups**

5. **Act as a courageous catalyst. Constantly search for and see real opportunities for change—and have the courage to initiate them**

In education, extraordinary leadership means more than simply getting through the day; it means coordinating a wide array of stakeholders and resources to align people and their work in order to create high-performing, student-centered school systems.
An Emerging Model of Leadership in Complex Environments

The Harvard Business Review, the MIT Sloan Management Review, and CEB have each presented research identifying traits that define the next generation of successful workers, including those with multi-sector experience, who possess “greater diversity of experience and thinking styles,” and who emphasize collaboration and see beyond individual or even team performance to make a broader organizational impact.

Successful employees will evolve beyond being simply position players in a hierarchy into masters of complexity who take wider views of their responsibilities and can therefore lead in diverse and complex settings like a multi-billion dollar global business—or an urban school district.

In demanding new work environments, leaders face significant, and often competing, challenges. Healthcare and government must be “better for less,” with fewer dollars and greater accountability. Retail businesses, ranging from electronics to clothing to cars to food, compete for resources and customers globally, with an unprecedented number of available choices to consumers raising the bar for quality.

As a result, traditional leadership skills like delegation and negotiation are no longer sufficient to drive organizational excellence. Across all sectors, and especially critical in education, leaders need broader skillsets to navigate increasingly complex environments and produce breakthrough outcomes.

By highlighting key themes from recent literature on the traits of successful, next-generation leaders and identifying the five key themes of education’s masters of complexity learned from the field, we hope to continue to refine what successful leadership looks like in education.
LESSONS FROM THE FIELD

WE TURNED TO THREE EDUCATION PIONEERS ALUMNI WHO CURRENTLY WORK IN COMPLICATED EDUCATION ENVIRONMENTS TO LEARN HOW THEY EACH APPROACH MASTERING COMPLEXITY AND TO REFLECT ON OUR THEMES. REPRESENTING DIVERSE EDUCATION ORGANIZATIONS RANGING FROM A LOCAL CHARTER SCHOOL TO AN URBAN SCHOOL DISTRICT TO A FEDERAL AGENCY, WE SOLICITED INPUT FROM SHANNAH VARÓN, EXECUTIVE DIRECTOR, BOSTON COLLEGIATE CHARTER SCHOOL; BRIAN PICK, CHIEF OF TEACHING AND LEARNING, DISTRICT OF COLUMBIA PUBLIC SCHOOLS; AND MARISA BOLD, CHIEF OF STAFF, IMPLEMENTATION AND SUPPORT UNIT, U.S. DEPARTMENT OF EDUCATION.

The Characteristics:
A New Kind of Leader

Schools and systems of schools are incredibly complex, diverse environments, with complicated webs of internal and external push-and-pull demands. How do education leaders successfully ensure academic success for all students within this context? Education Pioneers has identified five characteristics that masters of complexity exhibit.

1. THINK OF THE WHOLE PICTURE, NOT JUST YOUR PIECE, REGARDLESS OF YOUR ROLE

Instead of focusing solely on their individual role within a school, an office, or a school system, masters of complexity shift seamlessly between an on-the-ground orientation and broad, system-wide thinking. As they shift their view, successful masters of complexity also exhibit both humility and boldness by recognizing their individual place in the organization and striving for radical improvements.

In adopting a bigger-picture perspective, a leader can identify the most urgent priorities for all of a system’s stakeholders and successfully contribute to or create a high-performing organization. With a balanced perspective, masters of complexity leverage their own strengths, come up with more creative ideas, build upon the capabilities of their network, and achieve goals shared by many across the organization or system.
Shannah Varón, Executive Director of Boston Collegiate Charter School, highlights the need to take a broad view in her work: “I think of my role as school leader as simultaneously needing to be ground floor and balcony, but mostly balcony.”

For instance, when the Director of Student Recruitment position opened up at Boston Collegiate, Varón took a step back before simply posting the job. “I wondered what kind of options our school would have if I didn’t replace the recruiter,” she says.

Varón knew that Newark and New Orleans were piloting universal enrollment systems for charter schools and districts, and wondered if a school-level, dedicated recruitment role might become less necessary if Boston moved to a similar enrollment system.

“I could hire a full-focus student recruiter whose work might eventually be displaced,” she explains, “or, with those extra funds saved by not replacing the recruiter, I could meet other needs, such as instructional or operational needs, if I could find a way to reallocate recruitment tasks with the existing team.”

Varón, thinking about what was right for the entire organization’s teaching mission, distributed recruiting tasks among her current staff to reallocate the recruiting budget to other organizational priorities.

Similarly, Brian Pick, Chief of Teaching and Learning for District of Columbia Public Schools and winner of the 2012 Curriculum Leadership Award from the Council of Great City for “exemplifying leadership, innovation, and commitment to raising the academic achievement of all students,” also describes his role as one of reminding people—including himself—to think of the big picture.

Pick leads a district-level task force comprised of principals, instructional coaches, specialists, and central office staff, and “when we start meetings,” he says, “I remind everyone that we need to zoom up a level and put on our district hats.”

Because individuals are committed to their particular roles, it can be difficult to see one’s connection to creating a high-performing school system, but it is critical for system-wide transformation. “When you’re thinking about big topics like using assessment tools,” Pick explains, “you have to step out of your day-to-day perspective and think more globally.”

He likens maintaining the big picture perspective to envisioning what could be: “Henry Ford said if you asked people what they wanted, they would say, ‘Faster horses.’ If you only think in terms of horses, you never even get to see the possibility of cars.”
Masters of complexity are committed to understanding what motivates different stakeholders—including their aspirations, values, goals, priorities, constraints, processes, incentives, skills, and capabilities. Termed “contextual intelligence” by Nick Lovegrove and Matthew Thomas in the Harvard Business Review’s “Triple Strength Leadership,” this sophisticated stakeholder knowledge means the ability to see differences and parallels between groups and individuals. Understanding what is common and what is different can help a leader appreciate the reasons for people’s conflicting points of view and remain sensitive to how potential solutions will impact others.

Contextual intelligence is especially critical in education, where leaders must understand and make decisions that affect parents, teachers, elected officials, and policymakers to achieve success for children from diverse backgrounds. Education leaders who are masters of complexity have the potential to drive increased student opportunity and achievement by skillfully working with and aligning people with widely different backgrounds, values, and agendas.

As Shannah Varón explains, “Having a lot of stakeholders doesn’t mean you can’t make change. It means that I have to understand them and navigate how to work with them. That’s an art.”

Marisa Bold, Chief of Staff for the Implementation and Support Unit at the U.S. Department of Education, continually finds commonalities among stakeholders by focusing on students. “Keeping outcomes for kids at the heart of decisions frames priorities in new ways,” she says. “It helps bridge differences by building on what people are committed to in common.”

Additionally, Bold points out that a critical skill in the art of synergizing stakeholders is patient listening. And it requires more than email.

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SHANNAH VARÓN, EXECUTIVE DIRECTOR, BOSTON COLLEGIATE CHARTER SCHOOL

“If the environment is challenging, in terms of goals, timelines, and misperceptions,” she says, “then sit and listen to people’s perspectives. Seek the information they have and you might not have and vice versa. You’d be surprised that there are more commonalities than differences. That provides a path to bridging differences and often to coming up with better solutions to tough challenges.”
At DC Public Schools, Brian Pick makes a point of knowing firsthand what is happening in schools and the pressures teachers and principals are experiencing. Because he is trying to change the quality of teaching in more than 100 schools and 3,000 classrooms, being sensitive to people in the field is crucial.

“I visit schools at least once per week, and I ask principals and teachers what they are excited about, what they are struggling with, and how I and my office can help,” Pick says. “If a principal is proud of her teachers, I will talk to the teachers who are hitting it out of the park. If it’s a teaching problem, I focus on that.”

Knowing where specific time and priorities are focused gives Pick insight into how to guide conversations and follow through on issues of interest to a particular school, while also allowing him and his team to improve outcomes across the district.

RELY ON DIVERSITY AS THE MEANS TO HIGHER QUALITY DECISIONS AND OUTCOMES

The master of complexity not only embraces and understands differences, but also intentionally convenes people with wide-ranging perspectives and successfully compels them to achieve higher quality outcomes.

This is no easy feat. In the MIT Sloan Management Review’s “Developing Tomorrow’s Global Leaders,” the authors note the challenge to “promote both diversity and collective action at the same time.” They find that future leaders will “be characterized by people with greater diversity of experience and ‘thought styles’ […] even more than diversity of age, nationality, and gender” and that they will also “be working more collectively.”

While bringing together diverse groups often means that they are more prone to disagree or argue about work processes than non-diverse groups, the outcomes of their collaboration can drive significant and sustainable organizational impact, or what global advisory firm CEB terms “breakthrough” performance.

With many differences among diverse stakeholders and the need for sound decisions and collaboration, the master of complexity must manage the group dynamic: helping to surface and recognize shared mutual goals, negotiating group processes for working collaboratively and productively, respecting differences, stimulating creativity, and ultimately practicing patience and perseverance to generate better ideas, compromises, and decisions. In essence, this leader has confidence that the natural tension between diverse points of view and united action can be resolved—and that the resulting solution will be stronger than it would have been if the group was homogenous and the decision-making was easier.

Marisa Bold seeks diversity first when starting a high-priority policy initiative at the U.S. Department of Education by immediately reaching out across functional groups to form
teams that include new and veteran staff from legal, financial, program, communications, legislative, and other roles to bring differing perspectives to the table from the beginning.

“You end up with a big team on a tight timeframe, and at the beginning, it can be inefficient,” Bold admits. “But then everyone understands the goals and connections and having everyone together helps create better policies and processes. The lesson we learn from working together makes us more efficient the next time, because everyone understands the context we were working in, the needs of different stakeholders, and builds relationships that persist across initiatives.”

Bold recognizes that creating a big, diverse team does not mean everyone is going to be convinced of a decision, “but at least everyone understands why decisions were made, and we respect our differences.”

Additionally, because everyone understands the interconnectedness of decisions, “implementation is faster and smoother,” she says. Getting input from all corners includes hearing from stakeholders outside the team. She adds: “We get input from the public through a formal process. Each comment is valued, considered, and responded to. It follows our belief about bringing everyone’s thinking in to inform the work and ending up with a better outcome as a result.”

That diversity in group decision-making leads to better outcomes has also been borne out by private sector research. Not only do diverse groups bring an influx of new ideas, but they also tend to instigate more careful exploration of those ideas than might occur in homogeneous groups.\textsuperscript{14}

In corporations, diverse teams “extract innovation,” which leads to significant revenue growth. For example, a study by the Center for Talent Innovation reveals that publicly traded companies with diversity in both workforce and leadership are 45 percent more likely to have grown market share in the past 12 months compared to less diverse companies.\textsuperscript{15} The challenge for the master of complexity is to unlock the power of those different perspectives.
4 NURTURE AND LEVERAGE A WIDE-RANGING PERSONAL NETWORK FROM DIFFERENT GROUPS

To thrive in and maximize impact in a multifaceted environment, masters of complexity actively use their professional and personal networks as a resource and share what they learn. In education, that means looking for members from business, law, and other industries, where fresh or diverse perspectives can lend new insights, and then bringing those insights to the organization.16

Successful leaders also continually tend to their networks by cultivating past and present relationships, initiating new relationships with colleagues and potential advisors, and adjusting relationships as people and circumstances change.

Once leaders have established strong connections, they can then leverage their network in two ways, as CEB has identified.17 First, they feed or “contribute” to the network: offering help, building skills in others, and sharing resources, feedback, and ideas.

Secondly, the leaders can tap into or “consume” from the network, by seeking new ideas and support for getting things done and using back-door channels to solve problems.18 In “Triple-Strength Leadership,” Lovegrove and Thomas echo the importance of developing connections and emphasize “building integrated networks” as an essential skillset, as “networks can be a lifeline when things get rougher than expected.”19

Shannah Varón relies on her diverse network for managing sensitive situations, such as the one that arose in her role as Chair of the Boston Charter Alliance. “We hit a bump when one group felt left out of an ongoing dialogue that would affect all the charter schools in the district,” she explains. “I was glad to hear the concerns and help figure out what to do.”

Varón became the intermediary and picked up the phone to call several key players, as well as contacts outside the education sector, to get their perspectives. As a result, she was able to correct misinterpretations and quiet anxiety all around. “I don’t think I could have done that as easily and quickly if I didn’t have those solid network relationships,” she says.

Brian Pick echoes the value of network connection and relies on many networks. “I have my network of colleagues in other districts and the Aspen Institute network of Chief
Academic Officers. I take some very practical ideas from these networks and put them to work in DCPS,” he says. “I also have the Education Pioneers network that is a great source of talent, my Teach For America network that I turn to for inspiration, and I am in touch with Princeton alumni, my undergrad alma mater, who care about the education system in Washington. I also have close partnerships with the business community and funders who I keep in touch with on a weekly basis.”

In return for their support, Pick updates his various networks with news about progress in DC Public Schools in both formal and informal ways, including Twitter. Brian has tweeted pictures to a school-initiative funder directly from the school they supported. “Funders want to know their investments in STEM, literacy, coaching, and the like are having an impact,” he says. By providing them that context, “it’s like giving back to the network.”

Identifying and initiating change is a core competency of high performers in complex environments.

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ACT AS A COURAGEOUS CATALYST. CONSTANTLY SEARCH FOR AND SEE REAL OPPORTUNITIES FOR CHANGE—AND HAVE THE COURAGE TO INITIATE THEM

Being a “courageous catalyst,” one who seeks and initiates timely and priority-savvy opportunities for change, requires the master of complexity to become a committed change agent. He or she has to be willing to bring big ideas—changes involving many people—to the enterprise and always remember that the goal is to create dramatically better outcomes for all students so that they become career- or college-ready. However, being a courageous catalyst is not easy in the education sector, the private sector, or elsewhere.

Identifying and initiating change is a core competency of high performers in complex environments, according to the CEB’s “Driving Breakthrough Performance in the New Work Environment.” CEB notes that these leaders embrace fluidity and see the opportunity to be proactive. “They are not paralyzed by change, and they are willing to take action and move projects and priorities forward.”

The desire to become a courageous catalyst in the pursuit of urgent goals has been highlighted in the education sector literature as well. In Cage-Busting Leadership, Rick Hess
asserts that an educational leader must assume he/she has the “latitude and freedom to transform, reimagine, and invigorate” not only teaching but also how school systems are managed. The courageous catalyst takes on the red tape and bureaucracy, stimulates creativity, and encourages people to tackle hard problems they think are impossible to solve.²²

“The will to act is often the biggest barrier for those trying to transform their agencies,” says Ashley Joachim of the Center on Reinventing Public Education, co-author of *The Capacity Challenge: What It Takes for State Education Agencies to Support School Improvement*. “Without strong leadership and commitment to improving low-performing schools, more resources or legislative changes are unlikely to bring about meaningful change.”²³

DC Public Schools’ Brian Pick likens this idea to boldness. “We have the license to be bold and have been very bold,” he says of the DC district, where leaders constantly remind the team that, “We’re not here to become better bureaucrats. We’re here to give every kid in this city a world-class education.”

Current DC Public Schools Chancellor Kaya Henderson takes this missive to heart and uses cross-functional innovation workshops and teams both system-wide as well as in smaller taskforce settings to take on persistently sticky problems. Some of the problems are long-term and system-wide, like re-imagining the school experience or what education will be like in five years. Others are more focused, like raising student satisfaction scores in a particular school. Not much is off limits.

“We get everyone together,” Pick explains. “Some people have academic backgrounds, while others might work in operations, human resources, information technology, and even building maintenance. We say ‘Let’s figure out a solution to this’ and present recommendations to the Chancellor and her team. A lot of them get implemented, and we’ve made a difference in how things get done.”

Emboldened by the Chancellor’s determination to upend the status quo, “Everyone in the district has to think about not only doing their day job, but also what else we all have to do to invigorate the schools,” Pick says.

“THE WILL TO ACT IS OFTEN THE BIGGEST BARRIER FOR THOSE TRYING TO TRANSFORM THEIR AGENCIES.”

ASHLEY JOACHIM, CENTER ON REINVENTING PUBLIC EDUCATION
ULTIMATELY, MASTERS OF COMPLEXITY MUST BE “BRIDGERS” OR “BOUNDARY SPANNERS” WHO CREATE VALUE ACROSS METAPHORICAL BORDERS, ARE ALWAYS SCANNING THE ENVIRONMENT FOR OPPORTUNITIES, ARE CONSTANTLY IMPROVING THE STATUS QUO, AND ARE CONSISTENTLY WILLING TO INITIATE OR EMBRACE INNOVATION.

They convene diverse stakeholders, facilitate their communications, appreciate their differences and similarities, develop and contribute to wide-ranging networks, and bring people and perspectives together for improved outcomes.

When faced with tough decisions, they strive for informed, collaborative decision-making, ensure that everyone understands the rationale behind the choice, and advocate for the solution that best serves the organization’s ultimate goals. These leaders are masters of complexity who are comfortable with the challenge of working through differences and secure in the belief that the right answers will emerge.

Developing extraordinary leaders who can master complexity—a crucial tool to achieve breakthrough outcomes for students—should become a strategic imperative in every public educational setting. While there are examples of successful education leaders, we have yet to see extraordinary leadership at scale, to fully and systematically unleash the potential of staff, teachers, and—most importantly—students, as varying academic results attest.

How does this new mindset take root at scale, in environments with limited resources, constrained budgets, bureaucratic barriers, and an immediate need for improved outcomes?

The first step is immediate awareness: education organizations and their leaders must understand that these characteristics are both necessary and possible, and should recognize and reward them wherever they manifest. Next, current and aspiring education leaders should take deliberate action toward developing these traits in their roles today.

Becoming a master of complexity starts with the willingness—indeed, the courage—to address the difficulties of a complex and changing world and to build value across an entire organization, regardless of one’s specific personal role, management level, or team.
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**INTERVIEWEES**

**Marisa Bold**, Chief of Staff, Implementation and Support Unit, U.S. Department of Education  
*MBA, Harvard University, Business School*  
*Education Pioneers 2004*

In 2004, Marisa Bold was the first candidate to accept an Education Pioneers Fellowship, joining a nascent and entrepreneurial program. Bold now works at the U.S. Department of Education and has served as a core member of teams developing policy and supporting implementation for high priority reform programs that incent and support dramatic improvement in outcomes for students nationwide. Currently, she is the Chief of Staff for the Office of Innovation and Improvement, which manages more than 25 programs, including Investing in Innovation (i3), Promise Neighborhoods, and other strategic investments. Previously, Bold was Chief of Staff of the Implementation and Support Unit, which was created to pilot new approaches to supporting and strengthening education reform in states and districts through design and implementation of a portfolio of over $50 billion in competitive and formula grant programs, including the Race to the Top program.

**Brian Pick**, Chief of Teaching and Learning, District of Columbia Public Schools  
*MPP, University of California at Berkeley*  
*Education Pioneers 2007*

Brian Pick joined Education Pioneers in Washington, D.C., in the summer of 2007, and worked at the administrative office of DC Prep to develop, document, and improve the charter management organization’s standard operating procedures and best operational practices. Currently, he serves as the Chief of Teaching and Learning at DC Public Schools. Pick is a member of the Chancellor’s management team and leads the district’s academic work. His current efforts focus on ensuring that all students have access to a high-quality curriculum, engaging instruction, and aligned formative assessments. Over the past five years, Pick led the development and rollout of the DCPS Teaching and Learning Framework; served as the chairperson of the standards, assessments, data, and
accountability working group for DC’s successful Race to the Top application; and led the development, coordination, and implementation of the district’s academic strategy. He was the 2012 recipient of the national Curriculum Leadership Award from the Council of Great City Schools.

**Shannah Varón**, Executive Director, Boston Collegiate Charter School  
*MBA, Harvard University, Business School  
Education Pioneers, 2009*

Shannah Varón joined Education Pioneers in Boston in the summer of 2009 after graduating from the Harvard Business School. She spent the summer working at NewSchools Venture Fund, where her projects included identifying examples of school turnaround across the nation and researching early childhood investment opportunities in Washington, D.C. In summer 2008, she worked as a strategy consultant at the Parthenon Group in Boston, where she analyzed the return on investment for educational projects financed by a large foundation in New York City. Before business school, Varón was the Co-Director of Teach For America’s New York City Program, where she managed a team of 25 that was responsible for the student achievement gains of TFA’s 1,000 corps members, serving 65,000 students, across the city.

**END NOTES**

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3. (Lovegrove and Thomas, 2013)
4. (Thomas, et al., 2013)
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15. (Hewett, et al., 2013)
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21. (CEB, 2013)
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23. (Joachim and Murphy, 2013)
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