



Executives in Residence

Program Participant Summaries

A Yearlong Program
of Professional Development for ESA Leaders
July through June

Association of Educational Service Agencies

Executives in Residence Program Participants Summaries

2006-2007 / Year 3

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* The requirement of completing "Participant Summaries" was instituted in 2006-2007. This information is not available for Year 1 (2004-2005) and Year 2 (2005-2006) program participants.

Dennis Mathews

Associate Superintendent
Educational Service District 112
Vancouver, Washington

Year 3 / 2006-2007 Program Participant**Goal**

Increase knowledge of instructional programs and funding mechanisms used in other states.

Objective

Compare and contrast programs, both instructional and fiscal model, to assist Washington State in the decision/search for which models work best.

Activities and Topics

July 06	AESA Summer Conference, Portland, OR <i>Leading Schools: Distinguishing the Essential from the Important</i> by Tim Waters & Sally Grubb and EIR Introduction
October 06	Urban Special Education Collaborative (USEC), Memphis, TN Response to Intervention (substitution for Sept 06 DC conference)
December 06	AESA Annual Conference, Palm Desert, CA and AESA Executive Council Meeting
March 07	EIR Visitation: Hamilton County Educational Service Agency (HCESA)
June 07	Final Project: EIR Site Directory

Readings***The Educational Service Agency: American Education's Invisible Partner***

By Bill Keane and Bob Stephens

What I Learned

The AESA conferences, USEC, residency, and the final project were met with purpose: learn with the intent to implement. I could not have imagined how engaged I would become. The summer's AESA conference, *Distinguishing the Essential from the Important*, provided a firm foundation that it's all important, but there are essentials that an administrator cannot ignore. Although the annual conference sessions were done well, I liked attending the Executive Council meetings and the opportunity to experience the structure and internal mechanism of AESA and to some degree ESAs too.

The USEC conference—usual emphasis on special education—this time supported “all education” or the new term “all ed” and RtI. RtI is general education’s responsibility; however, it boils down to a very clear collaboration between general and special education working together to ensure 80-85% of children are learning in their core curriculum.

The HCESA residency was spectacular. I learned that there are remarkable similarities between ESD 112 and HCESA. That is, both require exceptional and competent leaders and incredible knowledge bases of ESD/ESA personnel, essential functions, and customer services; however, it was necessary to be cognizant there are significant differences between HCESA and ESD 112.

There are differences in the way HCESA receives revenues from the state and county, but like ESD 112 the majority of their funds come from customer oriented and fee-for-service businesses.

What Was of Greatest Value?

The on-site residency was by far the greatest value. I had ample opportunity to discuss face-to-face another state's instructional programs, funding mechanism, and special education formulas. I was totally involved, engaged, and treated like an executive. I walked away believing with a competent team (like the ones at ESD 112 and HCESA), I could function in the CEO spot. Additionally, when the opportunity presents itself at our state level, my residency experience will permit me to share more globally in regards to funding mechanisms and instructional programs.

What Advice Do I Have for Execs in the Future?

- Attend AESA annual conference and at least one other AESA sponsored conference.
- Attend all arranged EIR activities.
- Attend AESA conferences with a purpose: meet and discuss with other ESA administrators your goals and interests.
- Research possible on-site residencies.
- Interview the CEO.
- Participate in the residency: email, phone, and when possible discuss at conferences.
- Keep your CEO in the loop.
- Upon residency, report out to your CEO and, if requested, prepare a board presentation.
- Send a thank you to the essential people at the EIR site.

Tim Merlino

Chief Financial Officer
Educational Service District 112
Vancouver, Washington

Year 3 / 2006-2007 Program Participant

I asked to be considered for the AESA Executives in Residence program because I wanted to get a better understanding of the requirements of the Superintendent position and to see the decision making process in action. As a lifetime fiscal person I need to find out if I have the ability to change how I think and how I would need to work. I have worked in upper management at ESD 112 for the past 17 years and have been an employee here for 21.5 years. During that time we have had two superintendents whose styles are a lot alike. In the not too distant future there are likely to be retirements here, in the state, and around the country at ESAs that will provide for advancement opportunities for people with my experience and age.

I met Dr. Tom Svitkovich at the CEO conference in Portland. Tom is the Superintendent of Genesee ISD in Flint, Michigan. His organization seemed eager to host an applicant and he wanted to host someone with a business background. I talked more in depth with Tom at the AESA conference in Palm Springs, California, and found that their ISD is engaged in many new ventures. We talked for about an hour and we concluded that it would be a good fit.

I visited Flint in early May for one week. When I arrived we hit the ground running. I shadowed the superintendent for the full week. He gave me his full attention and explained how and why he made certain decisions. In an early discussion we talked about the superintendent position and about what being a leader means. He discussed the sacrifices that you make in this job and have to weigh that against the benefits that accrue because of it. He said that although it has been difficult at times he would not change anything and that in his current position he has had the time of his life. I very much appreciated Tom's candor and willingness to share how and why he has achieved what he has.

Genesee ISD has many innovative programs with a budget of greater than \$125 million. Tom has been the idea man in defining many of the programs. His ability to bring local superintendents together for the good of all was evident in several of the meetings I attended.

I met with all cabinet and several program managers and was free to ask many questions about how they work and how their programs are funded. I wanted to see if there would be a way for my ESD to provide a similar service. This is a tremendous opportunity to share how each of us works, what services are provided, and to see if there is a way to work on a more national level with another ESD.

I was given the opportunity to address the Michigan ISD superintendents at their meeting in Lansing. I was given 10 minutes to discuss the performance audit which the Washington ESJs received during the winter. I was pleased to have been provided the time to discuss this issue with them and answered questions that they had, as they are going through similar scrutiny in Michigan.

My trip to Michigan was quite satisfying. I met many great people whom I hope to keep in touch with over the years. Most of all I think that this trip and my time spent with Dr. Svitkovich has helped me in deciding whether or not to pursue a superintendent position. His energy and passion for his job are evident and through his shared experiences he demonstrated to me his views on what leadership means to him.

I would encourage potential ESA leaders to enroll in this program. I found it to be both rewarding and challenging. I will be able to use many of the things I learned from Genesee ISD in my job at ESD 112.

Julie Staley

Federal Programs Manager
Southeast Regional Resource Center
Juneau, Alaska

Year 3 / 2006-2007 Program Participant

This year I have been served well by the Association of Educational Service Agencies' mission to provide professional growth opportunities to its member agencies. As a participant in the Executives in Residence program, I benefited from exposure to the Summer CEO Conference in Portland, Oregon; the Educators' Call to Action: Federal Advocacy Legislative Conference in Washington, DC; and the AESA Annual Conference and Executive Council Meeting in Palm Springs, California. Yes, the destinations were wonderful, but the knowledge and experience gained and the networks made far exceeded the charm of the locales.

With the full support and encouragement of my present and past executive director, I set my goals for participation in the program. Fortuitous as it was, the prior year I had also participated in the Summer CEO Conference that focused on Leadership Change. At this time I did not know that SERRC's Executive Director was planning to retire in the near future. My experience at this conference afforded me opportunities to consider what effective leadership looks like and how the success of the organization is measured. Armed now with the knowledge that our organization would also be going through succession planning and leadership change, this became my focus for the experience I sought as an Executive in Residence.

I was fortunate to complete my exchange at Multnomah ESD in Portland, Oregon. Though very different in size, governance, organizational structure and funding sources to my service agency, they also were undertaking succession planning and preparing for a new leadership team. Both Doctors Schmitt and Hitchcock were gracious and well prepared for my visit to their agency and through our numerous conversations leading up to the exchange had defined what would be both helpful and rewarding for me to experience, as they moved through the change process.

Little did I know that the week of my exchange was to be so action packed; from learning about the Naming of Elephants within the organization that may hinder organizational growth, to department reorganization, board elections, OSBA regional meetings, superintendent council meetings, AFSCME bargaining for classified staff, and the collapse of the statewide testing system. And, all Dr. Hitchcock would say is, "This is a great week to be here!"

Although the week moved at break neck speed, I saw Multnomah's future leader in action and in my toolbox tucked away his compassion for both the organization and the people who make it, his confidence and adeptness in handling tough situations, his ability to lead by carefully listening and thought provoking guidance, and a leadership team that appeared seamless in their goal of a smooth and informed transition. I was afforded the opportunity to discuss with each member of the Cabinet their perceptions on how the leadership change process was being guided and the role they saw for themselves in helping the organization to thrive.

Dr. Hitchcock also required me to be thoughtful, asking me to consider what I had learned and how would I apply this to the changes my organization would also undertake. I sincerely appreciated the time and energy he gave to me and he will continue to be a respected mentor as I move forward with my career.

At this time I would also like to mention a couple of other highlights for me during my residence. Firstly, during the Legislative Call to Action I was able to ask questions about the protocols of lobbying, and appreciated the varied insight many executive directors afforded me; and secondly, it is with gratitude that I appreciate the executive directors who made me feel comfortable by introducing themselves to me and including me as part of their group. Networking can be intimidating and yet when connections are made with caring people, they become part of your circle of influence.

Thank you to all those people who have impacted me during my year of learning.

Dr. Maria Cashman

Associate Administrator

Grant Wood Area Education Agency

Cedar Rapids, Iowa

Year 4 / 2007-2008 Program Participant

My Executive in Residence experience started 04/21/08 at ESD 112 in Vancouver, Washington, with Twyla Barnes. After spending six days at ESD 112, I traveled across the Columbia River and spent three days with Ron Hitchcock at Multnomah ESD in Portland, Oregon.

I could outline many differences between ESD 112, Multnomah ESD, and Grant Wood Area Education Agency ranging from how these agencies get their funding to the differences in leadership style at the CEO level. My greatest learning, however, was more personal. When I started this experience, I was questioning my desire to be a CEO. There were many things about the job that I found attractive including the interaction possibilities with the senior management team, the ability to vision for the Agency, and the state leadership role in determining the next steps for our educational system. The aspects of the role that made me unsure were board relationships and maneuvering the political landscape with the legislature. While I am confident I can perform these responsibilities, I was unsure I wanted to focus my career on these activities.

After several coaching conversations with both Twyla and Ron, I have begun to see how these roles are a critical part of every ESD and how I can add value to those responsibilities. I have also learned that education is handled differently in every state and that the “Iowa way” is not the only way to deliver high quality services to students and families.

As I think about my professional future, I now have a better understanding of my options and the questions I need to ask as I move forward. For example, questions I may ask when looking at future jobs are:

- How is this ESD funded? Flow through dollars? Entrepreneurial?
- How does this ESD interact with the Department of Education in that state?
- How do the other ESDs in the state function? Do they have relatively homogenous services or does each ESD “do their own thing”?
- What are the future possibilities for this job? For example, is it wise to take a Deputy position in this ESD to position myself if the current CEO will be leaving in a couple of years?
- Where do I really want to live as I look forward to the next step in my career?

These questions and many more are going through my mind as I complete this extraordinary learning experience. The opportunity to shadow two highly respected and knowledgeable CEOs has been one of the most valuable experiences of my career. I would highly encourage other individuals who are interested in learning about the CEO position to apply for the Executives in Residence program.

Finally, I would offer the following advice to future Executives in Residence:

- I would not recommend spending two weeks in a row in this experience. It puts too much stress on the staff at the home Agency as they try and carry on business without a senior leader.
- I would recommend attending as many AESA conferences as possible. This allows numerous opportunities to interact with ESD leaders.

- I would recommend immersing yourself in this experience. Take every opportunity offered during the experience to see programs, meet people, and learn about the host organization.
- I would recommend setting aside the typical fears about asking the CEO questions. The CEOs I worked with were very willing to answer every question I had regarding every subject including salaries and benefits, board relationships, and strike negotiations.

Beverly Knox-Pipes

Assistant Superintendent
Genesee Intermediate School District
Flint, Michigan

Year 4 / 2007-2008 Program Participant**Goals**

- Expand knowledge of the internal and external work of ESAs around the nation.
- Expand knowledge of legislative process affecting ESAs.
- Observe ESA leaders at work: learn skills and traits that can be incorporated into personal characteristics.
- Expand networking and communication opportunities among ESAs regionally and nationally.

Objectives

- Compare and contrast ESA leadership and operation in two varying sized organizations to current organization in preparation for potential advancement to the CEO level at an ESA.

Activities

- | | |
|-------------------------|---|
| • September 2007 | "Call to Action" Legislative Conference |
| • December 2007 | AESA Annual Conference |
| • July 2007 – July 2008 | Multiple electronic communications with cohort to discuss experiences |
| • May 2008 | Residency at LEARN in Connecticut
- Dr. Virginia Seccombe, Director |
| • June 2008 | Residency at Region 12 ESC, Waco, Texas
- Dr. Tom Norris, Executive Director |
| • June 2008 | Summary and perspective of experience |

What I Learned

After reading *The Educational Service Agency: American Education's Invisible Partner* by Bill Keane and Bob Stephens as the foundation for my opportunity to observe ESAs on a more global level, and visiting two different ESAs, it became clear that ESAs around the nation are as diverse as they are the same. Leadership is key to successful operation and growth of ESAs and I had the privilege of witnessing two highly skilled and influential leaders in action. Through their leadership and vision it was evident each CEO had established strong relationships and set clear expectations to serve their customer base in equitable, efficient, and creative ways.

Through the support and mentoring of my Superintendent, Dr. Tom Svitkovich, himself a highly skilled and reputable ESA leader, and AESA's Executives in Residence Program, I feel that I gained a broader perspective of the work of ESAs and their primary mission as well as the leadership traits necessary to be a strong, effective CEO. As quoted from the reading, ESAs "contribute to solving the pervasive and challenging issues of assuring *equity, efficiency, and quality* throughout the state system of elementary-secondary education." Both ESAs I visited focused on delivering high quality programs and services to their service area and beyond, yet working within differing fiscal, governance, and legal frameworks. Each was held to high levels of accountability by member districts and state/federal regulations and mandates.

Some of the observations from my visits are:

- ESAs in many parts of the nation are entrepreneurial:
 - Require creative leadership team
 - Charge fee for service
 - Deliver focused marketing plan
 - Assess and reassess internal and customer needs to plan appropriately
 - Seek creative funding sources
 - Build successful partnerships and relationships
- ESAs work directly with local school districts and students in a variety of ways such as:
 - Professional Development
 - Curriculum strategies
 - Strategic planning
 - Certification academies
 - Leadership conferences
 - Regional Resource Sharing
 - Administrative services
 - Personnel and certification services
 - Transportation services
 - Business and finance support services
 - Grant writing
 - E-rate management
 - Instructional services
 - Distance learning and media delivery
 - School improvement
 - Early childhood
 - Multicultural programming
 - Career and technical Education
 - Technical services
 - Application support
 - Instructional integration strategies
 - Network and hardware support
 - Special education services

What Was of Greatest Value?

The on-site residencies were of greatest value. Being able to immerse in the culture of the organization and talk freely with staff at all levels was by far the most enlightening. I saw the pride and enthusiasm of each CEO permeate throughout the organization through a true team approach. I had the opportunity to visit with local constituent leaders in Texas as well as ESA colleagues and the State Education Leader in Connecticut to discover the positive impact each of the ESAs has made and continues to make in their respective regions. These were truly signs of influential leaders who are highly respected and knowledgeable. I am most grateful to Dr. Norris and Dr. Seccombe for welcoming me into their organizations and sharing the tips of the trade that helped them become the successful leaders they are. Through their candid sharing and the mentoring and support of Dr. Svitkovich, I feel honored to have been a part of this program experience and only wish it hadn't ended so quickly. It has strengthened my belief that should the occasion present itself, I could be CEO of an ESA. I hope to stay connected to the wonderful network this experience has afforded me.

Advice to Execs in the Future

- Participate in as many AESA functions as you can.
- Participate in residencies that are different in culture and size.
- Imagine the possible and see yourself in the lead position at an ESA.
- Ask for feedback and suggestions of the hosting CEO as they have insight about you with fresh eyes.
- Read the book by Stephens and Keane.
- Enjoy the opportunity . . . It is truly a gift. ☺

Thank you for including me in this wonderful opportunity!!

Dr. Karen Schwartzrock

Human Resources Director
Educational Service District 112
Vancouver, Washington

Year 4 / 2007-2008 Program Participant**Program Participation Objectives**

When I decided to apply for the AESA Executive in Residence program I had several objectives. These objectives included:

1. Expand my knowledge of the diverse ESA organizational structures and the different ways ESAs support equal educational opportunity and improved student achievement.
2. Gain an understanding of how ESAs provide support to urban school districts.
3. Observe exemplary educational leaders and gain insight on the characteristics of effective ESA leadership.
4. Clarify my own professional advancement goals.

As I approach the end of the program, I have more than accomplished three out of four objectives. The fourth, regarding my professional goals, is still a work in progress. Provided below is a summary of how the program supported me to achieve my objectives.

Knowledge of ESAs

Every Executive in Residence activity was a lesson in the diverse roles that ESAs play across the country. The conferences, including the CEO and Annual conferences, offered numerous opportunities to learn about innovative ESA programs. Interacting with the current and former executives in residence also added to my knowledge base. The capstone was the two residency visits.

Coming from a school district background, I had a substantial learning curve to grasp the diversity of ESAs—from funding, to customer base, to programs and services. Special education, media, and professional development/school improvement appear to be fairly constant across ESAs, but the type and breadth of these services varies across organizations. Beyond these foundation services, I have come to appreciate that the true value added of successful ESAs is the ability to develop programs and services that meet the needs of the school districts they serve. For ESAs that receive little guaranteed funding, survival and growth are dependent on the ESA's ability to anticipate school district needs and build the partnerships and funding streams to provide for these needs. Equally impressive, are those ESAs that do have a base of guaranteed state or local funding, who then work with district leaders to allocate the funding to tailor programs that meet the needs of students and schools. This was very true for the two ESAs where I did my residency visits. In Oakland, in just the short time I was there, I was able to observe the Superintendent and her executive team reallocating time, resources, and staff to provide support to a school district in crisis. In Los Angeles, I attended a dinner where the Superintendent announced a new program in partnership with the Pearson Foundation, to support teachers to obtain National Board Certification (NBC) and build technology capacity to allow NBC teachers to serve as master teachers to teachers across the large Los Angeles County region.

ESAs and Urban Education

Having spent five years working in an urban school district, I have a strong interest and commitment to urban education. I was very interested to learn how ESAs provide critical support to urban school districts. To achieve this objective, Twyla Barnes (my Superintendent and co-director of the program) assisted me to identify exemplary ESAs that support urban districts. The two we selected were Oakland County, Michigan, and Los Angeles County. While very different, both organizations are excellent examples of how an ESA can serve as a key partner in urban education. Both organizations have a leader and executive staff who are very knowledgeable about urban education best practices, and are committed to providing the best support possible to their urban school districts.

Los Angeles County serves not just one, but multiple urban school districts. During my visit I was able to observe the Superintendent and her leadership team tackle the reorganization of alternative education programs, including combining programs at different sites. Not only did they have to grapple with the typical problems of reorganizing—transportation, communicating with families, and transferring teachers—but the team also had to know the gang affiliations involved and be sure that transferring students were not going to have to cross rival gang territory.

In Oakland, I had the opportunity to observe the implementation of a new Mandarin Chinese program. I spent a delightful morning in a preschool bi-lingual classroom in a small suburban school district. This learning environment was in sharp contrast to a visit to an urban high school Mandarin Chinese classroom where a teacher had recently been stabbed and classrooms were locked during class sessions. Yet I came away knowing that Oakland County understood the challenges of the urban classroom and were committed to providing the school district with the support necessary to successfully implement the new language program.

Observe Exemplary Leadership

Every Executive in Residence activity provided an opportunity to observe exemplary leadership. During the three conferences I attended I had the privilege of listening to ESA leaders talk about successful programs and grapple with common challenges. I heard about a “coupon” book for new mothers that an ESA developed in partnership with schools, community agencies, and businesses. I learned about a recruitment program developed by an ESA in Connecticut designed to connect school districts with minority teachers. I listened to superintendents talk about the challenges of the political arena and the strategies they use to build and maintain an effective presence at the state and federal level.

I have been very fortunate throughout my career to work for and learn from extraordinary leaders, including my current superintendent, Twyla Barnes. Added to this list are the two superintendents that I had the privilege of shadowing during my residency visits: Dr. Vickie Markavitch, Oakland County Schools Superintendent; and Dr. Darline Robles, Los Angles County Office of Education Superintendent.

Dr. Robles and Dr. Markavitch have very different styles and lead very different organizations. The characteristics they share, however, are those of effective leaders. These include:

- A laser focus on students: For every challenge I saw them take on, the decision framework was what was right for children and what would improve the opportunity for students to succeed.
- Willingness to make the tough, right decision: I watched both women willingly make a tough, and potentially unpopular and politically volatile decision because they believed it was the right decision for children.

- An understanding that ESAs exist to meet the needs of their school districts: Both superintendents recognize the need to run transparent organizations and consistently demonstrate to their constituencies that they are making the best use of their resources. Both find numerous ways to involve district leaders and community partners in setting agency goals and building new programs.
- Recognition of the importance of building strong internal and external relationships: In Oakland, I saw the positive impacts for students in career technical programs supported by strong business partnerships. In Los Angeles, I watched the excitement of exemplary teachers as they heard about the resources the Pearson Foundation was going to provide to support the National Board Certification program.
- Appreciation of the importance of every individual: In Oakland, I watched as Dr. Markavitch boosted the morale of a young teacher who had the challenging task of teaching Mandarin Chinese to urban high school students. In Los Angeles, I sat in Dr. Robles' office as she answered a ringing phone at 7:00 p.m. It was a school administrator who had a student who could not walk at graduation the next evening unless she could get verification of credits completed through LACOE. Dr. Robles spent the next 45 minutes on the phone and with any staff available making sure that the problem was solved. As I went through the day with both Superintendents, I watched them engage with their staff—a kind word about a new grandchild; acknowledgement of a special project; sympathy for someone with an ailing family member—and saw the importance of these small interactions to employees.

I returned from both my visits inspired but also humbled. At a time when education struggles to find strong, visionary leadership I had the privilege of spending time with two superintendents who exemplify how outstanding educational leaders make a difference for students.

Clarify My Own Professional Goals

This objective is not fully realized but is a work in progress. At the beginning of the program I thought the possibility was fairly remote that I would want to pursue an ESA superintendent position. As my time in the program draws to an end, my position has evolved to one of possibility. I plan on spending the next several months reflecting on this past year, what I have learned, and what this means for my next professional steps.

Conclusion and Recommendations

Regardless of what direction my career takes, participation in the Executives in Residence program has improved me as an educational leader. I come away with numerous ideas I can use now and in the future to improve my work and that of my organization. I have a new professional network that I know I will draw on for many years to come.

AESA, the sponsoring ESAs, and the hosting ESAs are investing substantial resources in the Executives in Residence program. As the program matures, you are building a cohort of alumni who represent the future of ESA leadership and of AESA. I encourage you to consider ways to allow those of us who have completed the program to begin to give back to AESA.

Wanda Sommers Wall

Director of Education & Innovation
South Central Service Cooperative
North Mankato, Minnesota

Year 4 / 2007-2008 Program Participant

The AESA Executives in Residence Program provided me with an incredible opportunity to meet goals relating to leadership and career advancement within the educational service agency field. The goals I had at the time of application seemed “simple”: observe and learn more about variant leadership styles/philosophies and the responsibilities of executive directors, and transitioning to the role of Executive Director. The experience afforded me a much more intense personal review of my career goals and leadership theory.

With the support and encouragement of my executive director, I was fortunate to be able to attend the Summer CEO Conference in New York, the Federal Advocacy Legislative Conference in Washington D.C., the AESA Annual Conference in Florida, and visit two ESAs during the residency program. The conferences were all exceptional experiences. I found the Summer CEO and Federal Advocacy conferences not only enjoyable, but also a valuable networking and educational opportunity! Due to the smaller size of these conferences, participants enjoy the ability to actively discuss, network, and learn what and how other agencies throughout the country are serving their members.

The Summer CEO Conference provided the opportunity to learn about current educational topics and trends. Of particular interest to me was the information outlined in two published studies: Tough Times or Tough Choices: the New Commission on the Skill of the American Workforce, and Rising above the Gathering Storm: Energizing and Employing America for Brighter Economic Future (both documents can be found on the AESA website). The summer conference marked the beginning of the yearlong professional development training in ESA leadership.

During the Federal Advocacy Legislative Conference we were prepped on current legislative issues, AESA's legislative platform, and coached on the “how to” of meeting with government representatives. The education provided me with the confidence to meet with our state's senators and representatives and *intelligently* advocate issues that are important to what we do as ESAs to support our cooperative's members at a time when legislators are making decisions.

The final requirement of the program was to visit one or two host agencies. With such a large number of highly skilled programs host CEOs generously offering you the option to visit their agencies; the most difficult part was deciding WHERE to go! Although the final choice was based primarily upon my educational goals, a secondary factor was time and proximity. I chose to spend one week split between visiting Multnomah Education Service District in Portland, Oregon, and Educational Service District 112 in Vancouver, Washington.

The first part of the week was spent with Dr. Ron Hitchcock, Multnomah ESD Superintendent. I was able to spend time with directors of instructional services, human resources, and the chief program officer to discuss topics ranging from broad educational issues and the specifics of various programs to organizational leadership theory. It was interesting to hear from staff how they viewed the transition of leadership within the past year from Dr. Schmidt to Dr. Hitchcock. The meetings spent with Dr. Hitchcock were instructive, thought provoking, and energizing! He pressed me to look at “why” I wanted to pursue a leadership role in an ESA and offered candid conversation about his role as CEO, long range planning, transition planning, team building, and board relations. The entire staff was gracious, positive, and eager to answer questions and encouraged me to share information about what our service agency offered to our members. It was a busy two and a half days, but worth every minute.

The ESD 112 experience was equally action packed and energizing. I again was able to spend time with cabinet members to talk about each of their roles and responsibilities, attended a variety of meetings, and toured facilities. The time spent with Dr. Twyla Barnes, ESD 112 Superintendent, gave me the chance to see the specifics of how she works with her cabinet as a leader and manages the “little” emergencies that the role of superintendent brings to her. Her thought provoking questions regarding my expectations of not only the residency program, but also the specifics on preparing to be an ESA leader, pushed me to look outside of the box, set goals, and examine all potential opportunities. Furthermore, Dr. Barnes affirmed my belief in the value of community involvement as a leader of an ESA. It was evident by the number of partnership endeavors present and flourishing that local community organizations are enthusiastic supporters of ESD 112 initiatives. Entrepreneurial is the word that summarizes ESD 112.

A final part of our assignment as program participants is to talk about what we have learned and found beneficial. The other part is to offer suggestions to improve the program and the resulting experience for future program participants. What I have learned and found beneficial is outlined above; however, I do want to emphasize and suggest that experiencing two agencies back-to-back is incredibly valuable. I was able to compare and contrast not only with my current organization but also each of theirs. Interestingly, one of the meetings I attended was the first executive leadership exchange meeting between ESD 112 and Multnomah ESD—sort of a mini organizational level executive in residency.

Suggestions to improve the program and resulting professional development for future program participants are chiefly concerned with processing information to enrich the learning experience. Recommendations include the following:

- Development of a pre-event research and “to do” list which would include individual learning goals and objectives. Each participant would complete and review with program coordinators, each other, and their CEOs for each portion of the program.
- Provide and require post-event communication opportunities between participants via meetings, and/or conference calls/message boards at the conclusion of or soon after each event. The communication opportunities would be a “process” piece similar to the larger conference calls and meetings with the AESA Executives in Residence program coordinators/host CEOs and the participants; yet, it may be beneficial also for the residents to confer and process amongst themselves.

Both Dr. Hitchcock and Dr. Barnes presented valuable, insightful, well-organized visits, and I am grateful for the chance to see and hear ideas that could be brought back and implemented within our own organization. The Executive in Residence experience confirmed the obvious—networking between ESDs is a means by which all ESAs can become a more effective resource for our members and ultimately the students we serve. The program was challenging, worthwhile, and exceeded my expectations relating to an educational service agency CEO’s roles, responsibilities, leadership characteristics, and philosophy.

Loy Dale**Year 5 / 2008-2009 Program Participant**

Executive Director of School and Agency Operations
Educational Service District 112
Vancouver, Washington

Program Participation Objectives

I first became aware of AESA's Executives in Residence program when Cliff Carmody came out from Minnesota to spend a week and a half at our agency several years ago. As Jada Rupley, Dennis Mathews, Tim Merlino, and Karen Schwartzrock from our administrative team have participated in the program, I have increased my awareness of the value of the program to each of these individuals regardless of whether they have evolved into serving as CEOs of an ESA. Rather, they have each benefited in their roles as administrative leaders by the experiences this program has provided to each of them.

In my own case, I do not see myself becoming a CEO of an ESA. I do believe, however, that I can better understand leadership dynamics and become a more effective and successful contributor as an administrative leader serving on Cabinet and reporting to our CEO as a result of this experience. My areas of interest were in examining leadership styles and looking more closely at the Minnesota model of providing employee health benefits via group/cooperative purchasing.

Knowledge of ESAs

I am currently in my 14th year at this agency, and was with the ESD in Seattle for almost six years before coming here. In Seattle, I spent one year on that agency's Cabinet, and have been a member of the Cabinet at ESD 112 for the past nine years. In my nearly 20 years with ESAs, and ten years serving on Cabinet, I have observed the leadership styles of several superintendents. In my technical, programmatic role as the Executive Director of Insurance Programs, I have been involved in insurance matters throughout the 20 years with ESA's.

I have read a number of publications concerning ESAs, but the foremost document in that area was [The Educational Service Agency: American Education's Invisible Partner](#) by Bill Keane and Bob Stephens. Over the years I have also attended a number of AESA's CEO Conferences, Legislative Call to Action Conferences, and Annual Conferences.

Activities

This year, in particular, as part of the Executives in Residence program, I attended the CEO Conference in Vail, Colorado, in July 2008. I was particularly interested in the statewide "network and systems" work that Susan Leddick reported upon. Our agency has had Susan in to work with us on several occasions, most recently on "Dashboard Reporting" development.

In September 2008 I participated in the Legislative Call to Action Conference in Washington, DC. As part of our visits, we met with Senator Patty Murray, Representative Brian Baird, and the legislative assistant to Senator Cantwell on a number of issues including: IDEA, ESEA, E-Rate, Rural Schools, and Career and Technical Education.

At the AESA Annual Conference in Phoenix, Arizona, in December 2008 I met, along with my superintendent, with a representative of an on-line education provider interested in providing professional development courses for special education para-educators in Washington State. I also attended a number of presentations of ESA programs, including one on employee health benefits, an area I am particularly interested in.

I want to note that at each of the AESA events, a number of CEOs extended themselves to me by offering to host a visitation. It was difficult deciding where to go, whom to visit, and what to focus upon. At each of the three events noted above, I spoke with Cliff Carmody, the only member to date of the Executives-in-Residence program to become a CEO, about the prospects for coming to visit him.

The most significant activity of my year in the Executives in Residence program was clearly the shadowing of a CEO. While my visitation was late in the year, June 2009, I had coordinated the timing of the visit with Cliff Carmody, the CEO of Southwest/West Central Service Cooperative in Marshall, Minnesota. The time there could not have been better spent.

On day one I joined the agency's administrative team for an all-day, year-end retreat for wrapping up the school year, determining what work needed to be done over the summer, and laying the foundation for kicking off the coming year. Day two, the agency hosted the state department of education in its legislative session review and recap for all of the agency's area district superintendents. Given the fiscal distress Minnesota, like the rest of the nation, is experiencing, this was a very informative and well attended event. In the afternoon, I then met one-on-one with several of the agency's administrators and had very open conversations about their programs, and their working relationship with their CEO. On day three we relocated to a resort about three hours drive time away for a statewide, two-day conference of ESAs. The first day was focused entirely on their statewide employee health benefits cooperative joint venture. The second day addressed education policy matters of common interest, with a particular focus on their legislative consultative services contracts. The last morning, I met alone with Cliff and discussed what I had done, the issues and questions that were raised, and my sense of what I had gotten from the week's activities. He was very open and forthcoming and answered any and all of the questions I raised.

Lessons Learned

In the area of CEO leadership styles, my observations reinforced the importance of trust and building relationships. It starts with helping those over whom the CEO has direct authority expand the scope of their vision of the challenges and opportunities within their organization. It broadens to include the agency's leadership role with superintendents from within the region and with the state department of education. It also extends to working collaboratively with peer ESA superintendents statewide on joint insurance programs and in joint legislative initiatives for the benefit of the entire network of ESAs. And it ultimately extends to the connections with the local community like the board of directors of the local hospital and connections with the chamber of commerce. It was amazing to me how similar the challenges faced were between southwest Washington and southwest Minnesota. I witnessed the importance and strength of the "team," and the significance of finding and retaining the strongest possible leadership/administrative team possible.

With regard to the programmatic, specific statewide employee health benefits cooperative purchasing, I learned that there is much more going on "behind the curtain" than what meets the eye at a first glance. The challenges overcome already in 20 years of operation, and the daunting challenges being faced on the near horizon, lead me to be cautious and thoughtful in looking at replicating such a model in my home state. I have gained numerous personal contacts and resources with which to further examine the possibilities of replicating such a scheme in another state, but I realize that such an examination will take more time and will need to be very thorough before contemplating action.

Conclusion and Recommendations

My participation in AESA's Executives in Residence program has been a wonderful experience. One of the highlights of the year was an informal chat session the cohort members engaged in on an outdoor patio in Phoenix, Arizona, at the Annual Conference in December. That exchange of backgrounds and discussion of interests and experiences was extremely interesting and useful. I would hope that in the

future each group of participants in the program get that opportunity. To extend that experience, it might be useful to periodically provide opportunities for all the former participants in the program to be able to get together to discuss what lessons they have learned and benefits they have gained over the years after the program has ended. Maybe such meetings could be part of the programs offered at the Annual Conference. The members of this year's group were extremely high quality individuals, as I am sure has been the case in previous years. Hopefully AESA can find a way to capitalize on that shared learning extending well beyond the year of participation.

I also want to expressly thank Dr. Twyla Barnes, my CEO, for the support and encouragement in allowing me to participate in the Executives in Residence program, and for similar support and encouragement over my years at Educational Service District 112.

Dr. Doris Delaney

Deputy Director
Region 4 Education Service Center
Houston, Texas

Year 5 / 2008-2009 Program Participant**Goal**

Increase knowledge of the mission and work of Education Service Agencies (ESA) and their ultimate impact on school districts and student achievement.

Objective

Use strategic goals of creating raving fans, financial self-sufficiency, and increasing organizational capacity to compare and contrast the work of service centers in four states: California, Michigan, Texas, and Washington.

Activities and Topics

July 2008	AESA Summer CEO Leadership Conference—Vail, Colorado “Building AESA Success through Design and Innovation”
September 2008	Educators’ Call to Action: Federal Advocacy Conference—Washington, DC
December 2008	23 rd Annual AESA Conference—Phoenix, Arizona “Preparing Students . . . Delivering Success” AESA Executive Council Meeting
March 2009	Residency—Educational Service District 112 (ESD 112) Twyla G. Barnes, Ed.D., Superintendent Vancouver, Washington
April 2009	Residency—Los Angeles County Office of Education (LACOE) Darline P. Robles, Ph.D., Superintendent Los Angeles, California
May 2009	Residency—Oakland Schools Intermediate School District (Oakland Schools) Vickie L. Markavitch, Ph.D., Superintendent Waterford, Michigan

Reading

The Educational Service Agency: American Education's Invisible Partner
By Bill Keane and Bob Stephens

What I Learned

My learning experience began with review of the mission statements and/or strategic goals for each agency.

Mission Statement—ESD 112: Educational Service District 112 equalizes educational opportunities in learning communities through innovative partnerships, responsive leadership, and exceptional programs.

Vision Statement (excerpt)—LACOE: LACOE uses a variety of service delivery systems to eliminate the educational barriers associated with poverty and racial divisiveness in education, enabling students to exceed state and national standards.

Mission and Purpose—Oakland Schools: The mission of Oakland Schools is to pursue equity and excellence in education through service and leadership. Our purpose is to increase student achievement, serve diverse needs of students, and decrease costs and increase efficiencies.

Core Purpose, Vision, and Values—Region 4 Education Service Center (Region 4): Purpose—Revolutionizing education to inspire and advance future generations™. Vision—Creating Solutions that are the worldwide standard for educational excellence™. Values—Excellence, Service, and Children. I learned that each agency was an integral part of the school districts they served, regardless of size. I was able to visit agencies that served from 100,000 to over 2 million students. Each agency had established partnerships with superintendents and board members that were designed to collaboratively insure that, ultimately, the needs of all students were met.

My residency experiences encompassed three months. During this time, I visited ESD 112 in Vancouver, Washington; LACOE in Los Angeles, California; and Oakland Schools in Waterford, Michigan. Most interestingly, the visits gave me an opportunity to observe each superintendent handling really tough issues. Some of the topics that were addressed included budget cuts, stimulus funding, reduction in force, and swine flu. Furthermore, communication before, during, and after Hurricane Ike, in September, created another unexpected opportunity for learning from my own Executive Director at Region 4. Though we were both attending the Legislative Agenda Conference, Dr. McKinney was able to facilitate, through the use of technology, conference calls that allowed superintendents to receive information from the state Commissioner of Education. Further coordinated communication helped assist districts in completing related paperwork regarding school closures and other related topics. CEOs must possess or access tools and resources to quickly respond to the needs of districts and stakeholders.

Even with the information about stimulus funding being infused into the districts, there was concern about budget cuts and shortfalls. ESD 112 presented a “Reduction in Force” seminar for superintendents, business managers, and human resources directors. This provided an excellent forum for attendees to find out about reduction-in-force policies and procedures. The presentation was thorough, and participants were given additional tools such as websites and answers to frequently asked questions to further guide them through the reduction in force process. ESD 112 also expertly manages cooperatives and shared service arrangements. The superintendent facilitates coordination and pooling of resources among school districts. As stated in the agency sketch, “Innovative cooperatives save districts money, allowing them to operate more efficiently.”

The nation’s largest regional education agency, LACOE, has an annual operating budget of \$1 billion. However, at the point of my visit, the County Superintendent was unsure of the exact amount of the budget cuts; though it was estimated to be \$45 million. Because of the size of the organization, communication to the entire staff is shared via the County Office’s monthly publication, *CHANNELS*. The agency also has a television studio, and its communication department has videoconferencing that reaches four satellite offices and is archived on the website. During my visit, I observed the superintendent successfully address budget concerns with the board, district superintendents, the cabinet, and various staff members. The message—balancing the budget without compromising service provided to schools—was clear.

My final visit was to Oakland Schools, which was facing a cumulative (FY 2010–2013) loss of property tax revenue of \$136 million. Oakland County’s budget was decreasing as the demand for services from districts was increasing. I had an opportunity to experience the Superintendent’s budget review

presentation to the Oakland County Superintendents Association and the Local Education Agency Designates Board Meeting. The association meeting was interesting as all of the districts were experiencing budget shortfalls. A unique aspect of Oakland County districts is that they are able to recruit students. This prompted a discussion, facilitated by Oakland County, of the need to establish ground rules for recruitment which ultimately impacts district funding. My visit to Oakland Schools concluded with the Outstanding Teacher of the Year Awards. The event's theme was "Teachers and Students: A Magical Connection!" The night was magical as Oakland Schools and business partners celebrated the dedication and contributions of 59 exemplary teachers.

What Was of Greatest Value?

The residency experiences were of greatest value because they allowed me an opportunity to really compare and contrast the work of Education Service Agencies in four states. Each agency is unique as the needs of each district are unique. I was also able to broaden my understanding of the myriad of services that ESAs provide. Each agency provides services either through grants or fees for services. Agencies not only focus on student improvement, but provide services that also include support in business services, technology, transportation, workforce training, recruitment, payroll, and many others. The CEOs are all members of boards that support community development. Though this was not a goal, all of the CEOs I visited were women. As a woman, this was of great value to me as they were role models of what is possible. All three CEOs, Twyla Barnes, Darline Robles, and Vickie Markavitch, are outstanding and impressive leaders. Each of them welcomed me into their agency and allowed me to experience, with transparency, the work that they do. What was evident among all three was the mutual respect and professionalism exhibited with their cabinet members. They all had great confidence in the ability and expertise of those who work most closely with them. As a leader, I believe that it is important to be able to count on those who are providing direct leadership to staff and that those who represent the CEO must be professional, law-abiding, and ethical at all times.

What Advice Do I Have for Executives in the Future?

My advice is to be open to the learning experience. As a future leader, one may base a residency experience on the current work that he or she is doing for a center. As a Deputy Director for Education Services, I began my residency with a focus on supporting teaching and learning. Though I still believe that this is still the core purpose of ESAs, the scope of possibilities is much greater. I would also advise future residency participants to participate in all events provided. There were many learning and networking opportunities at the conferences throughout the year. This was an amazing and unbelievable opportunity, and though I have had varied school district experience, this residency has increased my knowledge of ESAs exponentially. I believe that for AESA, this is a program that needs to be fostered. As the organization seeks to keep the work of ESAs alive, the mentoring and support of future leaders is vital to continued success.

Dr. Tom Goodney

Deputy Superintendent

Educational Service Center of Franklin County

Columbus, Ohio

Year 5 / 2008-2009 Program Participant**Goals**

- To examine best practices in the areas of leadership, program, service, product development, customer service, and collaboration of AESA member agencies.
- To observe highly successful AESA leaders in action and glean particular skills and traits that I can adapt to my leadership approach.
- To learn methods that ESA leaders can employ in being increasingly more active in local, state, and national education public policy matters.

Activities

- | | |
|-------------------|--|
| • July, 2008 | Summer CEO Conference (Vail, CO) |
| • September, 2008 | Legislative Call to Action Conference (Washington D.C.) |
| • December, 2008 | AESA Annual Conference (Phoenix, AZ) |
| • February, 2009 | Residency <ul style="list-style-type: none">○ Multnomah ESD (Portland, OR)○ Clackamas ESD (Clackamas, OR) |
| • July, 2009 | Summary and Reflection |

What I Learned

The primary takeaways from this experience can be grouped into three categories. First, AESA and its core governance (Executive Council) are keenly aware of the challenges facing K-12 and ESAs and are aggressively pursuing an agenda of legislative advocacy, strategic planning, professional development, and support. The three annual AESA-sponsored events are aligned to this approach and provided me with exposure to talented leaders who are implementing proven solutions to their member school districts. Second, the experience with the 2008-09 residents was a great learning experience. Each member of the class is a highly accomplished leader in their respective organizations who work for some of the very best ESA CEOs in the nation. I learned something useful from all of them during the program. In addition, each shared compelling examples of how their agency executive/CEO had made tremendous strides in moving their organizations forward. Last, the residency experience with Ron Hitchcock (Multnomah ESD) and Milt Dennison (Clackamas ESD) continues to stay with me. They are tremendous CEOs who lead complex organizations with great skill and compassion. I believe I happen to work for and continue to learn from one of the very best ESA CEOs in the nation (Dr. Bart Anderson); however, the opportunity through the EIR program to have numerous and lengthy discussions and observations with Twyla Barnes, Ron Hitchcock, and Milt Dennison afforded me the chance to see and experience diverse ways of tackling some of the same leadership challenges encountered by all ESA CEOs.

What Was Of Greatest Value?

There is no doubt that the residency experience was of greatest value. Both Ron and Milt challenged me to think carefully about the four primary constituencies that any CEO/Superintendent works with: Board, legislature, member district superintendents, and staff. Each constituency is crucial to the success of an ESA. Each requires time, attention, and skill in leading and managing. Each changes over time and thus requires the CEO/Superintendent to change or alter their approach commensurately. Ron and Milt have differing styles, but each clearly focuses their daily/weekly attention on these four critical constituencies and balances them all with skill. That being said, I would rate the AESA Call to Action and attendance at the Executive Council meeting as also being very valuable experiences for me.

What Advice Do I Have For EIRs In The Future?

- Attend all AESA-sponsored events
- Get to know the other residents and tap into their depth of knowledge and expertise
- Think carefully about but do not over plan the residency experience
- Share critical insights and observations with Dr. Barns and Mr. Hitchcock throughout the program
- Advocate for AESA the EIR program and encourage others in your agency to apply in subsequent years

Final Thoughts

The AESA Executives in Residence Program is designed to allow for future ESA CEO/Superintendents to meet with current executives and learn about their agencies and their leadership style, learn about AESA and its key committees (Membership, Executive Council), develop professional contacts nationally, and observe CEO/Superintendents in the course of their work. My expectations of the program were high and the actual experience surpassed those expectations.

My Superintendent and our Governing Board made an investment by supporting me into and through the program and I thank them for the opportunity. The best way to repay that investment is to act on the very best of the key learnings, ideas, and best practices that I acquired during the year by applying them in initiatives that benefit the ESC of Central Ohio and our member districts.

Troy Lange

Director of Special Education
Mountain BOCES
Leadville, Colorado

Year 5 / 2008-2009 Program Participant**Priorities**

Aside from the incredible opportunity to gain first hand knowledge about how other ESAs deliver programs and services, I approached my AESA Executive in Residence with two main priorities:

1. Understand how effective governance and engagement of critical stakeholders is achieved.
2. Confirm or refute the essentialness for a leader to employ “soft” skills (e.g., clarifying purpose, inspiring trust, unleashing talent, aligning systems) often encountered in the literature and training.

Activities

July 2008	CEO Conference
September 2008	“Call to Action” Legislative Conference
December 2008	AESA Annual Conference
March 2009	Residency – North Central ESD, Washington
April 2009	Dr. Rich McBride, Superintendent Residency – Clackamas ESD, Oregon Dr. Milt Dennison, Superintendent

Discussion

Having the opportunity to participate in federal policy making through the Call to Action conference greatly enhanced my understanding of the critical role educational leaders can plan in working collaboratively with government. Our visits to the hill opened the door for follow up informational outreaches to help our elected officials make certain that both the opportunities ESAs bring to education and the specific needs that ESAs have are well understood. It also prepared me personally to engage our representatives.

The Executives in Residence program gave me the motivation to better understand the critical role that ESAs can play in a healthy, effective system of public education. As part of the program, participants were asked to read *The Educational Service Agency: American Education’s Invisible Partner* by Bill Keane and Bob Stephens. I was surprised by how relevant and enlightening the historical perspective of ESAs presented in this work was to the current status of some of the challenges and opportunities we are facing today.

Through the two Residency visits I was able to experience the small daily activities that a CEO does to empower others in the organization to unleash their talents and creativity to furthering the ESD’s purpose. I experienced the small consistent turns of the flywheel required to build engaged stakeholders and empowered governance. Each of the CEOs that I spent time with approached these essential leadership activities with a unique style, and that contrast was extremely valuable to helping to shape my vision of effective leadership.

My visit to North Central ESD was highlighted by the opportunity to experience the engagement and involvement of district superintendents to the strategic planning process. It was evident that a clear mission, vision, and identified beliefs were well established in both the staff of the ESD and the critical stakeholders. The opportunity to meet individually with some of the district superintendents gave me a strong sense of leading by providing opportunities and getting out of the way!

A weeklong residency at Clackamas ESD allowed me an extended opportunity to watch the simple day-to-day behavior an ESD executive demonstrates consistently to develop trust. I was fortunate to be able to observe a difficult “town hall” style meeting with staff on the sensitive topic of state and federal budget impacts. The challenge that many of us face in the midst of our world wide fiscal crisis represents a critical time for leadership and communication. My visit demonstrated that effective communication requires the opportunity for staff to be able to ask tough questions.

The EIR program also provided me with the opportunity to spend time with other emerging leaders, share our perspectives, and use each other as a sounding board. Together we explored our leadership styles and shared our desired vision for how we might lead in the future. We discussed the similarities and difference among our various service agencies and collectively captured a diverse knowledge of how each of us contributes to our organizational purpose.

Summary

Participation in the Executives in Residence program has provided me with an opportunity to expand my understanding about the role and function of a CEO in an educational service agency. It solidified my recognition of the essential nature of the soft leadership skills required to successfully guide an organization forward. One of the greatest gifts of the EIR experience is that it really never ends. Many relationships have been established and will continue to serve a support role as I encounter many unique opportunities to lead.

Deborah Myers

Executive Director of Human Resources and
Organizational Development
Hamilton County Educational Service Center
Cincinnati, Ohio

Year 5 / 2008-2009 Program Participant

The experience of being an AESA Executive in Residence brings a level of professional learning unsurpassed for educational service agency executives. Having been involved with AESA since the mid-1990s, I have long recognized the value of interactions with its members, events, and programs. And, this past year, I had the opportunity to participate as an Executive in Residence. This program, perhaps more than any other, is designed to provide:

- a structured approach to learning about the functioning of AESA and the value that it brings to its members;
- opportunities to interact with AESA senior leadership and Executive Council;
- flexibility to customize learning experiences to individual goals; and
- a deeply personal cause to examine and reflect upon one's own career objectives and pathways.

Beginning with the Summer CEO Conference in Vail, Colorado, the focus on innovation and design wonderfully set the stage for the year. It was a year of remarkable insights, one filled with challenge and accomplishment. While familiar with the concept of innovation and design from an organizational perspective, it took on deep personal meaning as I gained perspective into my own leadership style and abilities.

I particularly enjoyed being a part of the Educators' Call to Action: Federal Advocacy Legislative Conference in Washington, DC. I gained a new and deeper appreciation for the importance of federal legislation related to ESAs throughout the country. My learning experiences fell into three categories: networking, informative presentations, and visits to legislators on "the hill". Due to a relatively small number of participants in this conference, it was possible to interact with numerous CEOs and Executive Directors from across the country. Discussing the critical issues of federal funding and legislative support for educational initiatives set the stage for me to learn more of the political agenda for AESA. The presentations on legislative and budget processes, current issues, and AESA political interests provided a backdrop for the ensuing conversations with legislators. I shared the time on "the hill" with the Ohio contingent, visiting several congressional offices and presenting perspectives on issues pertinent to Ohio ESCs and AESA's national agenda.

In the Executives in Residence session at the national conference in Phoenix, we were challenged to describe our own leadership style, our perceived strengths, and what we were looking for in the residency component of the program. I was touched by the open, honest, and personally revealing responses from my colleagues. We talked about our strengths and weaknesses, our successes and failures, and our goals for the future. I remember being struck by the realization that this is why AESA sponsors this powerful program—it is literally an investment in its own future ... the growth and sustainability of future leaders—what a compelling commitment!

Then came the most difficult and challenging aspect of the entire experience—it was time to choose the site of our residency. What a magnificent problem to have! There is such an abundance of outstanding leaders from which to choose, such diversity in agencies, scope of services provided, governance structures, political affiliations, financial models, and leadership styles represented in AESA. I was fortunate that my superintendent had determined that he would support two visits to different ESAs.

After considerable soul searching and guidance from trusted mentors, I was able to identify the two ESA leaders that I wanted to visit.

In May, I travelled to Solano County Office of Education to spend time with Dee Alarcon and her team. Dee sits on AESA's Executive Council, is the first female county superintendent in Solano County's 158-year history, is highly active in local and state professional associations, and as a California County Office Superintendent, is an elected official. For these reasons, among many others, I chose Solano County for my residency. While there, I spent time with all the members of her Cabinet, learning about their particular positions and responsibilities. I witnessed the true effectiveness of this leadership team, their trust with one another, and their commitment to their colleagues as they addressed some difficult issues related to staffing and funding. I visited many of their programs and saw first-hand the significant value that SCOE brings to its schools, its communities, and most importantly, its students.

Throughout my visit, the core values of SCOE resonated in very real and substantial ways. SCOE continually builds depth and breadth to its collaborative partnerships with special education, higher education and community services, and other County Offices. The strategic nature of this activity revealed how deeply rooted SCOE is in the educational community and how SCOE's effective leadership has ingrained the importance of this into every aspect of their work.

While calendars and other commitments did not permit a second residency as part of the program, I look forward to being able to visit Glenn Pelecky and Mississippi Bend AEA 9, even though that will likely occur outside of my program year.

As with all successful endeavors, their value is sustained due to the continuous improvements enacted over time. While the AESA Executives in Residence program has been among the most significant professional development activities of my career, I offer the following thoughts for consideration:

- Increase interaction among the program participants during the year (perhaps through an online forum?). Seeing each other at the program events was so rewarding and valuable, the opportunity to interface with each other throughout the process could enhance the value of the overall experience.
- There is a growing abundance of agencies willing to "host" an Executive in Residence, with the number of potential "hosts" outweighing the number of annual program participants. My agency has hosted on two separate occasions and I believe there is just as much value for the host as there is by the Executive. Therefore, might there be some opportunity created to facilitate interaction among the program participants and the ESA leaders who have expressed an interest in hosting? Since actual residencies tend to be limited by calendars and travel budgets, this connection could provide additional opportunity to learn, benchmark, and network.
- How about a "reunion" of past participants ... perhaps at the national conference? For AESA, this could provide a more longitudinal value perspective of the program. For the program participants, what a great way to reconnect!

And finally, thank you AESA for providing this opportunity ... thank you to those who so significantly contributed to my learning along the way ... thank you to Dee Alarcon and her Solano County team, who gave so graciously of their time and professional expertise ... thank you to Twyla and Ron for their dedication to this program ... thank you to the members of my Executives in Residence "class" from whom I learned so much ... and thank you to my superintendent and mentor, Dave Distel, for his leadership and support!

Dr. Trace Pickering

Program / Services Administrator

Grant Wood Area Education Agency 10

Cedar Rapids, Iowa

Year 5 / 2008-2009 Program Participant

Having the opportunity to interact with ESA CEOs from across the country at the various conferences and meetings held throughout the year provided for a well-rounded experience. In addition to learning about various “shops” I also learned a great deal from my participant colleagues regarding their work, goals, hopes, and frustrations. My experience culminated in a near week-long visit to the Hamilton County Educational Service Center in Cincinnati, Ohio. Superintendent Dave Distel and his team graciously allowed me inside their organization to learn about their challenges and triumphs.

Perhaps the most important thing I took from the experience is that ESAs across the country are led by dedicated, bright, and innovative people. I was able to make important comparisons and contrasts between my shop in Iowa and a shop in Ohio. Their funding model and client needs and demands create a very different set of dynamics from an Iowa AEA who is almost entirely state and federally funded. My one-on-one time with Mr. Distel allowed me to ask questions about the role and challenges of the CEO: how he builds his team, how he sets direction, how he determines his work priorities, how he helps his organization manage change, etc. Between this experience and the openness of my own CEO, I have learned that the role of the CEO in the ESA is one requiring constant attention to the larger context—the CEO must be not only a steward for their own organization, but for the larger system of which intermediate agencies are a part. The job is simultaneously political, outwardly focused, inwardly focused, and, often, somewhat isolating. Building a solid and trusted executive team is critical in ensuring that the essential internal workings are moving forward.

The opportunity to spend a week with a high-functioning and well-regarded team like Hamilton County was an incredible and worthy experience. The team has formed a close bond—they work hard, challenge each other, and laugh and have fun on a daily basis.

My advice to future Executive in Residence participants include:

- Keep your residency manageable—3 or 4 days is sufficient in one shop to get its flavor and experience what they have to offer. Making it to two different shops over the course of a few months would be very valuable.
- I would recommend attending as many AESA conferences as possible. This allows numerous opportunities to interact with ESA leaders and to see them in different contexts: deeper learning at the CEO conference, working the political side in D.C., and getting the larger role of ESAs at the winter annual conference.
- I would recommend thinking through all the questions you have for CEOs. The opportunity to capture their valuable time should not be wasted. The CEOs who offer up their organizations for such visits are very open to questions and, I discovered, really enjoyed the questions and the opportunity to discuss the job.
- Don’t be afraid to be clear with the host organization regarding your needs and what you are hoping to experience. Hamilton County was able to provide me with all the experiences and information I went there to learn about from an overview of a software application, to discussions about how they approach innovation and systems design, to a regional meeting on

service delivery, to an annual meeting regarding their technology consortium, to all the opportunities to talk to staff and executive leaders about their organization and their role in it.