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LEARNING TO SUCCEED AT SCALE

Given the desperate plight of urban schooling and the disheartening track record of conventional reform, dynamic new ventures like the KIPP Academies, Edison or Green Dot Public Schools are increasingly being asked to stand in for failing district schools.

While promising, these ventures have thus far typically been characterized by “one-off” examples of success that are extraordinarily reliant on talent and passion, philanthropic funding and exhausting work schedules. Many of the most frequently cited brands (such as Green Dot, High Tech High, Aspire, Uncommon Schools, St. HOPE, and Achievement First) run fewer than one or two dozen schools nationally. These pockets of excellence have produced tangible benefits, but the challenge of bringing them to scale has remained elusive. Former Harvard Business School lecturer Stig Leschly has estimated that only about 250 of the nation’s 4,000 charter schools deliver impressive results—there is little evidence that the rest are demonstrably superior to existing alternatives.

For many funders, practitioners, and policymakers, scaling up the most successful ventures has become the sine non qua of successful reform. Many of these ventures are already embarking on ambitious growth plans. Most notably, KIPP hopes to nearly double the number of schools it runs in the next five years from 57 to roughly 100 schools.¹

One approach for building scale is to encourage schools to emulate “best practices.” Given the appealing simplicity of this tactic (“figure out what works, then repeat”), it is no surprise that this recipe has attracted interest.

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The problem is that such an approach requires that the key traits be explicitly identified and faithfully imitated by other school systems. Unfortunately, our record when it comes to identifying and then duplicating effective practices over the past quarter-century, from Ron Edmonds’s “effective schools” research² forward, has been uneven—to say the least. More generally, the track record of attempts to succeed by mimicking successful organizations is less than impressive, both in the public and private sectors.³

A less popular but more promising course, and the one we explore here, is to help successful new ventures grow in a more sure-footed manner by considering how factors that fed early success may need to be revisited. While there are lessons here for traditional K-12 districts, the challenges associated with changing established districts are substantially different from those faced by charter networks and charter management organizations (CMOs). Our focus, then, is on how nontraditional educational entrepreneurs can help themselves “grow smart.”

Smart growth begins with smart organizing. While the jury is still out on the merits of various organizational forms, it is clear that organizations embracing tightly knit “clan models” have thus far enjoyed more success than corporate models or loosely coupled cooperative models. Charter authorities Robert and April Maranto (2006: 159) have explained that “clans are highly stable, elite organizations characterized by common values and traditions that are ensured by careful recruiting, selection and indoctrination of members... [They] have low formal centralization with empowered principals and teachers but high informal centralization through their unique personnel policies.”⁴ The clan model benefits from intense employee commitment, strong organizational culture and superb quality control.

So far, so good. The problem is that clans are produced by intensely selective hiring and “true-believer” cultures that make expansion slow and difficult. Many of these new clan-like organizations have embraced the “mitosis” mindset sketched out by High Tech High School founder Larry Rosenstock, in which they explicitly limit growth to “pods” spun off by individuals successfully steeped in the organization’s culture. This is an alluring model, but it suffers three serious limitations.



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First, it is enormously demanding in terms of human capital, leaving organizations dependent on their ability to find talented, high-energy members ready and willing to launch new pods. If the well is shallow or if these individuals burn out, then it becomes a self-limiting strategy. Second, mitosis dramatically limits the speed at which organizations can expand. Third, and most critically, mitosis ultimately offers a fragile growth model: it presumes that organizations can and should keep doing what they have done before and that clones will prove similarly effective in new locales. This raises questions about adapting to serve different clienteles or growing beyond an initial niche.

Of course, many “new” school organizations are small by design. They are content to effectively serve a few sites and to leave it at that. For them, remaining small is a strategic choice and one that we are not questioning. Our focus is on those ventures that regard growth as desirable or a key tenet of organizational strategy. If growth is an objective, the question becomes: How can new educational ventures sustain performance while continuing to grow?

Career Imprinting in Education

One reason that clan-like models initially “work” is the uniformity of their approach to systems, culture, and teaching. This homogeneity reflects these clans’ “organizational career imprint”—the set of capabilities, connections, confidence, and cognitions that individuals share as a result of working for a given organization at a particular point in time.⁵ These 4 C’s can be understood as a kind of organizational brand or DNA. For example, Teach For America (TFA) alumni are often notable for their shared values, expectations and confidence. This common imprint is the product both of TFA’s screening and TFA teachers’ exposure to the organization’s muscular culture—as well as an explicit selling point in TFA’s recruitment strategy. As Wendy Kopp, founder of Teach For America told a Yale student audience in 2005, “It’s probably impossible to do Teach For America and come out seeing the world in the same way.”⁶ This powerful imprinting process is what helps these ventures thrive in the short term, but it also may ultimately hinder their ability to adapt, evolve, and grow. Considering this tension may provide an opportunity for new ventures to rethink prior practices and make some productive changes moving forward.

This is all pretty opaque. Let’s turn to an example from another talent-driven sector—biotechnology—to understand how imprinting can work and why it matters. Biotechnology is particularly useful here both because there are structural similarities between biotech entrepreneurship and the new educational sector—such as uncertainty, high stakes, and long time horizons before results are clear—and because it permits us to draw upon perhaps the most closely-drawn study to date of organizational career imprinting, Higgins’s 2005 volume *Career Imprints: Creating Leaders Across an Industry*.

Career Imprinting at Baxter and Beyond

In biotechnology, of the 299 firms that went public in the eighteen years between 1979 and 1996, approximately one quarter had at least one member of their senior leadership team who, at some point in their career, had worked at Baxter Travenol—a major healthcare firm in the 1970s. By comparison, Johnson & Johnson, a much larger firm than Baxter, had alumni on less than one-fifth of the leadership teams at these new ventures. Other prominent names, like Abbott, Merck, Eli Lilly, and Bristol-Myers Squibb, had even less representation. Baxter was spawning entrepreneurial activity at a vastly disproportionate rate. What was it about the environment at Baxter that yielded so many entrepreneurs at the dawn of the biotechnology industry?

A crucial explanation centers on the kinds of career experiences that Baxter employees shared. Three key factors, enumerated below, led to the strong entrepreneurial imprinting. Imprinting happens in all organizations, but what matters is how strong and purposive that process is, and what kinds of skills and mindsets team members ultimately develop. Understanding imprinting as a challenge and a tool holds critical lessons for educational reformers and entrepreneurs seeking to shift from “one-off” pockets of excellence to growth and sustainability.


Imprinting Factor #1: Stretch Assignments

Giving new-hires extremely challenging work assignments—**stretch assignments**—when they join an organization is central to the imprinting process. At Baxter, rising managers were sent overseas early on, often within two years of joining the firm, to run an operation with little guidance. Often unfamiliar with local language, culture, or regulations, these young managers were still responsible for profit and loss from day one. A Darwinian winnowing resulted, with young managers demonstrating or hurriedly acquiring an entrepreneurial bent—or falling by the wayside. They learned to manage cash flow, develop extra-organizational networks, oversee budgets, and be self-reliant, which was profoundly different from the capabilities, connections, confidence, and cognition acquired by their peers at competing firms.

Practices in some new school providers are eerily similar to those of Baxter—most explicitly, the tendency of outfits like KIPP to ask new principals to take on stretch assignments—for example, to oversee, from scratch, the creation of new school communities. Equipped with little more than some introductory training and mentoring, new school leaders are routinely asked to oversee the development of facilities, teams, and cultures. Those successful at this work emerge with entrepreneurial skills and a mindset alien to the traditional landscape of public education. As Richard Barth, CEO of KIPP has noted, part of “KIPPness” is an underlying “ethos of individual responsibility.” The upside of giving these kinds of stretch assignments early on is that individuals enjoy a tremendous sense of empowerment and self-efficacy such that leadership becomes truly shared or distributed throughout the organization. Team members are not only invited to tackle entrepreneurial assignments, they are expected to do so.

And yet, there are also downsides to stretch assignments. First, those doing the stretching may become overwhelmed or exhausted. At KIPP, for instance, founding school leaders enjoy tremendous support and autonomy, but the intensity of these roles has led to succession issues; school leaders rarely stay for more than four or five years.⁷

A second challenge, one which plagued Baxter, is that entrepreneurial imprinting disproportionately produces individuals inclined to go run their own organizations. Once Baxter managers got a taste of running their own show, they tended to seek out similar kinds of posts, and venture capitalists kept an eagle eye out for opportunities to poach these budding entrepreneurs. To address such challenges, KIPP has sought to reimagine the career paths of school leaders.



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Imprinting Factor #2: Social Reinforcement

Organizations can also strengthen the imprinting process by providing **social reinforcement** throughout employee training and development. Practices such as hiring in cohorts or seeing that peers experience similar developmental pathways can instill shared norms and expectations. At Baxter, individuals were hired in distinct cohorts, straight out of business school, and provided similar early-career experiences that reinforced the firm's entrepreneurial values. New employees were teamed with mentors, enabling seasoned employees to share both formal knowledge (such as product-related information) and informal tidbits (such as how to communicate with senior executives) with new hires.

We find similarly strong socialization and social reinforcement practices in the KIPP Foundation's Fisher Fellows program and in New Leaders for New Schools. At KIPP, new school leaders are inducted through an intensive summer program featuring instruction by the organization's founders; this is followed by an in-school "residency" program and then six months organizing, recruiting and preparing in the locale where they will open their school. The intent is to provide aspiring school leaders with a sense of what it means to "be KIPP" and ensure consistency when they launch their schools.

One benefit of such practices is the strong social networks and bonding that result. This can foster commitment and collaboration, clarify organizational identity, and facilitate peer-to-peer role-modeling and mentoring. Even after organizational members move on, strong ties can continue to yield reliable referrals for new hires, leads for collaborations with valuable external partners, and access to information and resources beyond the boundaries of the organization. At Baxter, alumni maintained their social networks after leaving and frequently secured formal partnerships back with the firm years later. These networks also helped secure talent and increase prominence, as new business school graduates recognized Baxter as a breeding ground for entrepreneurial talent.

One potential downside of social reinforcement and strong social networks is the possibility of "in-hiring"—a kind of inbreeding in which organizations end up hiring like-minded people and inadvertently develop blind spots. For instance, nearly two-thirds of the people in KIPP's Fisher Fellowship class previously taught in KIPP schools. A strong sense of mission can tip into hubris, with individuals becoming enamored of assumptions and routines, insular in hiring practices, wedded to a limited circle of external partners, or unintentionally restrictive about the ideas and expertise they seek. Numerous scholars have shown that insular networks—those that are more dense and less diverse—reduce the amount and availability of new information, while stifling innovation and creativity.⁸ Hiring from the outside has been an obstacle for organizations like Aspire, which, while committed to incorporating varied skill sets and perspectives, has anxiously wrestled with whether "an outside hire [would] be able to do things 'the Aspire Way'?"⁹


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Imprinting Factor #3: Demonstrated Success

A third factor that can strengthen career imprinting is **demonstrated success**. When individuals see evidence that certain organizational routines (e.g. hiring practices, systems, strategies, and structures) “work,” they are more likely to repeat them faithfully. At Baxter, various employee awards served as company artifacts that legitimated the success of Baxter’s entrepreneurial model and imprinted a collective sense of progress. This same dynamic has played out in schooling. Teach For America’s success has been, in a large part, a product of its ability to brand itself as a great place for new college graduates to start—positioning itself as the 21st-century counterpart to the Peace Corps during that organization’s glamorous 1960s heyday.

Teach For America’s recruitment efforts, carried out on more than 400 college campuses, have been so effective that 11 percent of the senior class at Yale University, 10 percent at Georgetown University, and 7 percent at the University of Michigan applied to join TFA this year.¹⁰ KIPP’s early success benefited enormously from an enthusiastic *60 Minutes* profile and from subsequent nationwide attention from media outlets such as the *Oprah Winfrey Show*, the *New York Times*, *Time Magazine*, and *ABC World News*. Such visibility leads to the perception that these new educational models are indeed “working.”

Showcasing these successes can attract new waves of talent and funding and also motivate educators to take pride in the organization’s vision and develop confidence that the theory of action works. At Baxter, this translated into extreme forms of organizational commitment in which an executive needed only to give a manager a “tap on the shoulder” to get him to tackle a new assignment—even if it meant assuming an overseas position on 24 hours notice. At KIPP, public acclaim has reinforced impassioned commitment, with teachers working long hours at school, being reachable by cell phones after school hours, and pitching in on everything from school facilities to community outreach.



Attachment to a particular way of doing things can short-circuit thoughtful reflection on what is working, why it is working and how the model might be improved.

Beyond the obvious upsides of such success lurk less evident perils. The downside of early “success” can be insulation or, even worse, narcissism. Attachment to a particular way of doing things can short-circuit thoughtful reflection on what is working, why it is working, and how the model might be improved. As KIPP’s Barth has observed, “If you’re the only game in town and are the ‘place to be,’ there is a lot less anxiety about addressing this issue.” He notes that staying attuned to the challenges can help resist the temptation towards hubris: “Once you start growing and competing for talent, then you think, ‘wow; we’d better reconsider some of our approaches.’”

One risk is that organizations may fail to apprehend their perils and mistakenly believe they are in fact engaging in tough self-appraisal. Organizations may welcome internal debate on select issues—such as instructional technology or math instruction—while remaining tone-deaf to the possibility of revisiting broader assumptions about recruitment, job descriptions, or staff development. Edison Schools has done an admirable job of seeking to tackle this challenge and offered a useful model for other CMOs by reaching out to a variety of thinkers and practitioners in crafting its far-reaching “2.0” redesign—in which the firm has rethought core design and operating assumptions.

At Baxter, insulation from the realities of the marketplace fed into the company’s passive stance when it came to entering the emerging biotechnology industry. Several Baxter alumni recalled it as an “enormously frustrating” time to be at Baxter because the firm’s leading scientists and senior cabinet had become convinced that “it was too late to compete in the biotechnology field because the accumulated experience in genetic and other earlier-started firms was so large that you couldn’t catch up anymore.” In this presumption, they couldn’t have been more wrong—and the firm’s commitment to stay with its recipe and avoid this new space compelled top talent to look elsewhere.

In education, heralded new ventures can feel enormous pressure to keep on doing what they have been doing. Early success and recognition reinforce confidence in the original model. Organizations awarded rock star status find the acclaim is a boon in recruiting. “Customers” such as parents and community members may demand certain “branded” schools, creating expectations that are resistant to change. Finally, reliance on the support of funders and friendly public officials eager for demonstrable results leave growing ventures with few incentives to invest in knowledge-building or self-scrutiny. The risk is that the attention and attendant demands may eventually prove a hindrance when it comes to honestly appraising what has worked and why.

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Implications

In every case, the factors that strengthen imprinting and early success in new ventures can become flaws if unchecked. How can savvy operators anticipate and address these challenges? The first step is to take an internal audit of a firm’s organizational practices and consider the extent to which the firm engages in stretch assignments, social reinforcement, and public recognition of entrepreneurial success—all of which tend to foster a strong entrepreneurial career imprint. Next, consider where, along the continuum from “strengths” to “weaknesses,” the firm lies in terms of employing these practices. This exercise will lend insight into which of the following steps might be most useful (see Table 1).

1. **Create Intrapreneurial Roles.** Although stretch assignments can instill in employees a sense of empowerment and heightened self-efficacy, they can also beg a simple question for employees: How can I take the next step and continue to be an entrepreneur within this organization? Even if there are a limited number of start-up types of entrepreneurial jobs such as founding a new school, organizations can encourage and nurture entrepreneurial talent from within the ranks by creating **intrapreneurial roles**. This entails creating positions or jobs in which individuals have distinct authority over important pieces of the firm's work—assignments that provide a large degree of latitude and, importantly, require some innovation or radical kinds of change from within. It may not be the same as opening a new school or starting a new operation overseas, but it may be just what is needed to retain those who have been bitten by the entrepreneurial bug early on in their tenure with an organization.

Such an approach may require more creativity with regard to talent management than has been the norm in education reform organizations. Human capital is the driver of these new firms, yet they have had difficulty modifying their strategy as their needs for talent evolve. For example, because KIPP is now centralizing many of the tasks of the school leader, the expectation is that founding school leaders will no longer need to build their expertise in finance or real estate. While this will reduce the burdens on new school leaders and permit them to focus more tightly on teaching and learning, some may resent the heightened involvement of regional managers and desire more entrepreneurial leeway. The challenge is therefore to craft appropriate stretch assignments that neither make jobs unnecessarily difficult nor unduly stifle entrepreneurial opportunities for high-performers.

As firms such as KIPP and Aspire grow, finding ways to give employees such as these the “opportunity to have a greater impact” is a core challenge. Does moving people into centralized roles “work”? Can other key roles—intrapreneurial roles—that require entrepreneurial ideas and attention—such as technology utilization, instructional design, or professional development—fit the bill?

2. **Adopt an Ecosystem Perspective.** Often, if an employer cannot provide an attractive next step for employees who began in entrepreneurial roles, organizational members will decide to leave in search of possibilities elsewhere. This can be difficult, as no one wants to lose talented employees. One productive response is to adopt an **ecosystem perspective**—that is, to acknowledge impending departures and make them a strategic asset by creating and fostering alumni networks and celebrating the successes of those who depart. An ecosystem approach ultimately benefits the organization—allowing it to tap into new relationships, expand its reach, and position itself as an incubator of talent. As KIPP CEO Barth has noted, for some, departure is inevitable: “There are certain people who either won't be attracted to a new paradigm or who, even after being with us, want to go off and do something else... I think that's great.”

At the dawn of the biotechnology industry, Baxter opted for an ecosystem perspective; they continued to embrace departing employees by throwing alumni parties, encouraging informal alumni gatherings to maintain social networks, and publicly celebrating the successes of alumni when they became leaders of biotechnology start-ups (especially as these firms went public). One result was

that Baxter ended up making business deals with several of these early biotech entrants, which was lucrative for all. Baxter's open-door stance was in stark contrast to competitors who turned a cold shoulder to alumni, with one competitor reportedly warning departing employees, "You're never going to be happy again."

An ecosystem perspective can provide substantial long-term benefits to breeding grounds like TFA or KIPP. Whether those relationships ultimately yield eager new job candidates, a favorable reputation, creative solutions, or connections to powerful stakeholders is difficult to know in advance. Therefore, it is important to keep the cycle of stretch assignments coming to nurture and retain the best and brightest. But when they do decide to leave, it is valuable to proactively and strategically maintain those ties. TFA offers a model for how this can be done in schooling, by treating its efforts to keep alumni engaged, informed, and connected with the organization as a key element of its strategic vision.

TFA purposively showcases its 12,000-strong alumni network, promising that "through their shared corps experience, alumni form lifelong personal and professional relationships and rely on each other as a source of jobs, mentoring, support, and inspiration," and hosts annual summits where alumni can "work to strengthen this network, foster connections and advance our collective thinking."¹¹ Indeed, TFA alumni have gone on to create entrepreneurial ventures and hold influential positions both inside and outside the traditional public school system. Among other ventures, TFA alumni have launched KIPP and The New Teacher Project (TNTP), itself a program for recruiting teachers into urban school systems.¹² TFA reports that of its 12,000 alumni, over 300 are school principals or superintendents and more than a dozen are elected school board members.¹³

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3. Build External Social Capital. As with stretch assignments, social reinforcement can be an early strength, and later, a weakness for the organization—particularly if its strong social networks lead to narrow hiring practices. At Baxter, the talent well consisted almost exclusively of a small number of elite business schools. At Aspire, the talent pool has been drawn primarily from former district educators, and preferably, from those who started lower within the organization.


To counter excessive intellectual or organizational homogeneity, it is useful to seek out alternative sources of talent by building **external social capital**—that is, relationships extending beyond the partnerships pursued in the early stages of growth. Organizations should seek outside perspectives and thoughtfully build external social capital, whether through board seats, consulting arrangements, or outside hires. Some educational programs such as the Broad Residency Program explicitly and intentionally incorporate out-of-sector hiring as part of that strategy. So too is the case for New Leaders for New Schools, Edison, and Wireless Generation—all of which cast a broad net when seeking talent.

Looking outside the sector is useful not only to deepen the talent pool, but because it offers a way to challenge the strong imprinting underway and ensure that organizations are open to different ways of growing. After examining how companies in other sectors manage growth, KIPP recently approved a “stage-gate process,” designed to balance their appetite for growth with ramped-up concern for the operational side of their business. This involves calibrating the likely success of a new school by tracking milestones with each new school leader to assess progress. While the jury is still out on the effectiveness of this process, the exercise itself represents an important organizational step for KIPP—particularly as KIPP is among the first CMOs to reach scale.

4. Organize to Learn. Even the most effective new providers will willingly concede that there is much they have to learn about negotiating community relationships, recruiting talent, delivering instruction and professional development, employing technology, designing curricula, and so on. In any sector, overemphasis on what has worked so far can impede necessary learning. Research on organizational learning has found that openness to mistakes, admitting that one does not have all the answers, and openly asking questions and soliciting advice are all particularly difficult exercises for an organization faced with high stakes, public scrutiny, and a good deal of uncertainty.¹⁴ In the education sector, these dynamics are the norm, so it is especially important that growth-minded education organizations **organize to learn**.¹⁵

Again, the goal is one of balance. Demonstrating wins and executing effectively are essential, no matter what the sector. Yet, the danger is failing to recognize opportunities for self-reflection, whether they entail developing new research relationships, rethinking performance metrics, or bringing in outsiders to ask hard questions. School leaders can create a climate in which employees feel that unconventional stances are valued by inviting inquiry regarding their own assumptions (e.g., about the rate of growth the organization should assume), admitting a lack of knowledge or expertise (e.g., about certain local markets or stakeholders), and rewarding those who do likewise.

In education reform today, becoming a learning organization is not only a matter of coming up with new or better solutions; the broader challenge is to spread practices that actually work. As KIPP CEO Barth explains, “In our network, ideas tend to gain currency with one or two people. But if it is working, what does the school in Tulsa get from it? We’re not fully leveraging our scale.” The key is not only to collect information, but to examine it and then communicate those findings. These are challenges that many successful new ventures have not yet focused on, but which will prove crucial to the next stage of their growth.



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Table 1: Opportunities and Challenges of Career Imprinting

Factors that Strengthen Entrepreneurial Career Imprinting	Initial Strengths	Later Weaknesses	Implications for Action
Stretch Assignments (Provide employees with jobs that stretch them far beyond their current skill sets)	Distributed Leadership <ul style="list-style-type: none"> • Sense of empowerment, responsibility, accountability • High self-efficacy 	Talent Drain <ul style="list-style-type: none"> • Burnout leads to turnover • Limited career path leads to turnover Talent Dearth <ul style="list-style-type: none"> • Scarcity of qualified recruits as organization grows 	Craft Intrapreneurial Roles <ul style="list-style-type: none"> • Build opportunities for entrepreneurship in other aspects of the organization's work Adopt an Ecosystem Perspective <ul style="list-style-type: none"> • Celebrate alumni successes • Keep door open for future relationships
Social Reinforcement (Hire, train, and socialize in cohorts or peer groups)	Strong Social Networks <ul style="list-style-type: none"> • Strong commonality of values, mission • Fast peer-peer learning, role-modeling 	Nepotism <ul style="list-style-type: none"> • Reduced cognitive flexibility • In-hiring 	Build External Social Capital <ul style="list-style-type: none"> • Broaden hiring sources • Create partnerships that push for reconsideration of commonly-held assumptions
Demonstrated Success (Provide rewards and recognition for a job well-done; publicly legitimate organizational model)	Highly motivated, inspired workforce <ul style="list-style-type: none"> • High organizational commitment • Clarity about norms, behaviors • Collective sense of success 	Insulation/Narcissism <ul style="list-style-type: none"> • Overly focused on execution of prior models • Limited reflection on possibilities for change 	Organize to Learn <ul style="list-style-type: none"> • Invite inquiry into assumptions, data, theories of action • Role-model help-seeking behavior • Create safe spaces for speaking up, questioning prior beliefs

Conclusions

The appeal of mitosis-style growth or “best practice” imitation is undeniable. Who could resist the temptation of letting a “sure thing” grow slowly or simply copying a recipe out of an acclaimed cookbook? Unfortunately, the evidence is that large-scale educational reform will not be delivered by following such a course. Imitation may be flattering, but decades of experience suggest that it is only haltingly effective when it comes to replicating even the most promising educational programs. Markets are local, clienteles differ dramatically from one place to the next, and the challenges and availability of facilities, staff, and other resources vary enormously from Miami to Memphis. In the face of the imposing demands of 21st-century schooling, recognizing the dark side of imprinting and the ways to combat it may help equip educators to answer the challenges ahead.

ABOUT THE AUTHORS

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