



Opportunity and Challenge Profile

Search for the CEO

WestEd

San Francisco, CA

WestEd – a national non-profit, nonpartisan organization working at the nexus of education research, policy, and practice to promote excellence, achieve equity, and improve learning for children, youth, and adults – seeks applications and nominations for its next Chief Executive Officer (CEO).

As a national leader in research, development, and service, WestEd reimagines solutions to the most demanding and enduring challenges in education and human development. In pursuit of its ambitious mission, WestEd develops, disseminates, and applies high impact, high quality, and high utility research-based knowledge to education and other communities. WestEd employs deeply mission-oriented professionals who are recognized as experts in issues ranging from school and district improvement, assessment of and for learning, technology-enhanced learning, STEM, youth resiliency and health, school climate, literacy, and early childhood development and education. The agency works in partnership with schools, districts, education agencies, foundations, policymakers, and others committed to education improvement and reform and human development, crafting and using research to meaningfully influence the lives of infants, children, youth, and adults.

WestEd's next CEO will join a highly respected nonpartisan organization that is seeking an entrepreneurial and collaborative leader to assess its strengths and set the agency's strategic vision for the next decade and beyond. Headquartered in San Francisco, WestEd has experienced considerable growth in recent years, with over \$211 million in operating revenues and a staff of over 1,000 employees deployed across 12 U.S. offices. As WestEd's chief relationship builder and public ambassador, the CEO must be a persuasive broadcaster of the agency's tremendous work, success, and impact, further strengthening the organization's brand recognition and reputation. To fulfill this charge, the CEO will partner with WestEd's staff and Board of Directors to strengthen and expand WestEd's position as a thought leader in the field.

The successful CEO will address a set of key opportunities and challenges, as listed and reviewed in greater detail in this document:

- Set a clear, strategic vision for WestEd's future
- Build, develop, and strengthen partnerships to amplify the agency's mission
- Champion efforts to support, retain, and develop a talented team
- Promote and prioritize diversity, equity, inclusion, and belonging both internally and externally
- Oversee continued programmatic and service growth to deepen WestEd's impact
- Provide executive leadership to strengthen WestEd's operational infrastructure
- Maintain a close working relationship with the Board of Directors

The WestEd Board Search Committee, with the assistance of Isaacson, Miller, a national executive search firm, has provided a list of the desired qualifications and characteristics of the CEO. The list can be found at the conclusion of this document and provides background information and details about the key opportunities and challenges related to the position.

About WestEd

WestEd (“the agency”) is committed to improving the effectiveness of the nation’s educational systems and has earned national acclaim for its strong programmatic research and development base, and its extensive expertise in convening and assisting diverse stakeholders in defining and addressing emerging needs. WestEd staff work collaboratively to provide a broad range of services – research and evaluation, professional learning, technical assistance, and policy guidance – that are tailored to the needs of the agency’s clients. A nonpartisan partner, WestEd generates knowledge and applies evidence and expertise to improve policies, systems, and practices.

Programs at WestEd are organized into three divisions:

- Division 1. Assessment of Learning; Educational Leadership; English Learners and Migrant Education; Literacy; Quality Schools and Districts; Resource Planning; School Choice; Special Education Policy and Practice; and Talent Development and Diversity
- Division 2. Early Intervention, Resilience, and Inclusion; Resilient and Healthy Schools and Communities; Justice and Prevention; Infant and Toddler Care; Early Childhood Learning and Development; Early Childhood Integrated Systems and Policies
- Division 3. Assessment Design and Development; Assessment Research and Innovation; Improvement Science; Learning and Technology; Mathematics; Research-Practice Partnerships; Science and Engineering; Post-Secondary Pathways; and Career Mobility.

Clients and partners include national and state governments, education and health agencies, local school districts, national educational associations, community and family foundations, small businesses, and other nonprofit research and service firms.

Mission and Values

The mission of WestEd is to work with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults. The agency has four core values:

- Value Research: We draw from and add to the research base in our core areas of work and identify the best available evidence to guide decision-making. We share our findings in ways that are useful and accessible to the field, to inform improvements in policy and practice.
- Ensure Excellence and Integrity: We strive to conduct only the highest-quality work and to be impartial, fair, and ethical in carrying out our work.

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- Focus on Equity: We operate with a particular commitment to populations that traditionally have been inadequately served or unfairly treated, aiming to eliminate opportunity gaps and foster equitable opportunities and outcomes through all we do.
- Strive for Impact: We seek work that is meaningful and useful, and that leads to positive outcomes and sustainable improvements in education, development, and related fields.

Governance

WestEd was established by a Joint Powers Agreement signed on December 1, 1995. The California Joint Powers Act enables a wide variety of public agencies to come together to create a new, separate agency empowered to act on behalf of the initiating agencies. WestEd was formed by the Far West Laboratory for Educational Research and Development (FWL) and the Southwest Regional Laboratory for Educational Research and Development (SWRL). The agency's status as a JPA makes it a nonpartisan, nonprofit research, development, and service agency, tax exempt under Section 115(1) of the Internal Revenue Code.

WestEd is not controlled or managed by a governmental department or agency, nor does it receive funding by direct appropriation through a governmental agency's budget or by tax revenues. It does not have an endowment or any other source of guaranteed funding. Rather, WestEd's operating funds are in the form of revenues derived from contracts and grants awarded mostly as a result of a competitive Request for Proposal (RFP) competition.

WestEd is overseen by an independent Board of Directors. The Board consists of the designated board members of FWL and SWRL and additional members who are appointed by the Board. Currently, WestEd's Board of Directors consists of 55 distinguished leaders from public and private education, business, and human services sectors. The Board is led by a group of three officers (chair, past-chair, and chair-elect) and an Executive Committee comprised of the officers and committee chairs. The agency benefits significantly from the Board's leadership, thinking and commitment to education. Each member offers a unique perspective on education, drawing from their own experiences and relationships within the public, private, nonprofit, and government sectors.

Leadership Transition

In January 2023, Glen Harvey announced her decision to step down from her role as CEO. Dr. Harvey has led WestEd for more than 25 years. Under her noteworthy tenure and leadership, WestEd has become a leading research and development organization working to achieve equity and excellence in education. To meet the diverse needs of WestEd's clients and their communities, Dr. Harvey has concentrated on expanding and deepening full-service work – launching high-profile projects, publishing rigorous research studies, translating research into policy and practice, and providing valuable technical assistance and professional learning. Dr. Harvey will continue to serve in her role until a new CEO is in place and prepared to assume leadership of WestEd.

Role of the Chief Executive Officer

Reporting to WestEd's Board of Directors, the CEO is responsible for establishing WestEd's future direction and ensuring alignment of mission, vision, and strategy. The CEO will ensure the development and implementation of programs, services, and policies that further the agency's mission with an emphasis on relevance, quality, and impact. In addition, the CEO is responsible for prudent management of WestEd's organizational resources, including a budget for fiscal year 2023 of \$235 million, and for identifying and developing the appropriate resources to grow the agency's work and diversify its portfolio. The CEO will create and maintain an organizational culture that prioritizes the agency's mission, employee engagement and satisfaction, strategic growth, and a commitment to diversity, equity and inclusion. As the voice of WestEd, the CEO will represent the agency at the highest levels with funders, policy makers, opinion leaders, constituents, clients, and collaborators, and will be an effective steward of the Board of Directors.

Key Opportunities and Challenges for the CEO

To effectively lead this strong organization and build upon its internal and external success, the CEO will be a strategic, visionary, and inspiring leader; an effective relationship builder; politically astute; and an unabashed champion of WestEd's mission and core values. More specifically, the next CEO will address the following set of key opportunities and challenges:

Set a clear, strategic vision for WestEd's future

To ensure WestEd's continued success, the next CEO will develop and guide a forward-thinking vision to advance the agency's reputation and recognition as a preeminent agency for nonpartisan education research, development, and service. The CEO will spearhead an inclusive strategic planning process to assess WestEd's collective strength, identify the agency's unique opportunities, and collaboratively devise short- and long-term plans that shape the future of the agency while allowing it to remain agile enough to stay competitive and effectively respond to emerging needs. In doing so, the CEO will continue WestEd's trajectory of excellence and impact in its existing programs and position the agency to strategically expand existing work and pursue new service lines in response to a rapidly shifting national and international landscape.

To ensure WestEd continues building on its strengths and leverages new growth opportunities, the next CEO will endorse continual self-evaluation of the agency's frameworks, program models, services, and success metrics to remain nimble and ensure their practices are aligned with their mission, core values, and nonpartisan status. The agency looks to the CEO to communicate, delegate, inspire, make tough decisions, and build a stronger, unified, and more cohesive WestEd.

Build, develop, and strengthen partnerships to amplify the agency's mission

The CEO is the public face of WestEd and will champion its mission across various settings as it continues to grow its national reputation as a go-to source for evidence-based, rigorous information and nonpartisan guidance. Even in today's politically polarized environment, WestEd has successfully navigated many key relationships and built strong support from across the education community. The next CEO will also need to successfully navigate this context and bring a high level of visibility, exceptional communication and relational skills, and a confident presence. In addition, the next CEO will engage in challenging but meaningful conversations with the press, elected officials, and educational leaders. They will be seen as a trusted advisor to various constituents and communicate WestEd's clear value proposition to clients, partners, and other organizations to create synergies, identify new service lines, and explore other opportunities for diversified financial support.

Champion efforts to support, retain, and develop a talented team

WestEd's dedicated staff is its most significant asset and key to its success. To continue as an employer of choice amid high rates of job turnover nationwide, it is incumbent that the next CEO commit to developing a human resources strategy that nurtures a transparent, supportive, positive, and accessible workplace and internal culture for all WestEd staff. As part of their strategy and approach, the CEO – working with leaders across the agency – must identify ways to incentivize and provide professional development opportunities to build staff capacity and support upward mobility within the agency. One priority for the CEO is to be proactive about fostering talent from within, with an added emphasis on maintaining transparent, effective, and objective advancement processes agency-wide. Another priority will be to foster a culture of continuous feedback and deliver actionable priorities for staff development and engagement. The successful candidate will also identify and implement effective virtual workplace practices to increase feelings of belonging and engagement, maintain work/life balance, and maximize productivity and effectiveness. In doing so, the next CEO will support the development of a positive and productive work culture and climate within WestEd's highly distributed operation to support, retain, and develop talent within the WestEd team.

Promote and prioritize diversity, equity, inclusion, and belonging both internally and externally

In alignment with its mission to ensure a more equitable society, the next CEO must have a nuanced understanding of the principles of diversity, equity, inclusion, and belonging, and a demonstrated commitment to advancing these tenets. To lead these critical and, at times, difficult conversations and actions, the CEO will bring deep experience in building diverse and inclusive communities and will mobilize the resources necessary to ensure that WestEd's culture encourages all to thrive. The CEO should commit to and model the organization's principles of diversity, equity, inclusion, and belonging and support a culture that embraces all and reflects the population it serves. To support its mission-critical work, WestEd has convened a DEI Council of stakeholders from different levels of the agency; this group solicits and provides feedback and presents recommendations to guide WestEd's continued work in this space.

Oversee continued programmatic and service growth to deepen WestEd's impact

WestEd seeks to continue a bold and sustainable path forward to deepen its impact across the education landscape and other related areas of impact. The agency currently operates a wide variety of programs and services to meet the interconnected needs of its client community. In general, these services have different funding streams – including federal, state, and local education entities – which function under separate regulatory structures, require different staffing needs, with broad geographic distribution. An opportunity for the next CEO will be to assess WestEd’s successes and view them as assets to expand the organization’s impact.

The new CEO will support the enhancement of infrastructure for strategic growth and innovation, bearing in mind client needs, program quality and impact, staff capacity, and financial resource development of the organization. This will include potentially expanding existing partnerships or traditional avenues for resources, which may include growing the agency’s fluency in new technologies; deepening its footprint in emerging and existing areas of strength; and potentially developing partnerships at an international level. Utilizing the agency’s wealth of data and outcomes, the CEO will work to evaluate programs and services offered to ensure they meet its client constituents’ needs and determine strategies to differentiate WestEd in the market better and provide steady, incremental, incremental, and purposeful growth.

Provide executive leadership to strengthen WestEd’s operational infrastructure

Over the past several years, through mission-driven, entrepreneurial endeavors, WestEd has experienced substantial growth; its revenues have increased by approximately \$50m since 2017, its workforce has nearly doubled in size, and it now serves and partners with more than 670 clients and funders. As WestEd has matured and continues to expand both in size and in services to its clients, it has become necessary to update systems and organizational procedures to reflect the agency’s scope and scale to ensure continued excellence and impact. The CEO is expected to maintain effective communication across its various units and work to promote community and consistency across the agency. To do so, the CEO will prioritize building and maintaining an operational infrastructure that features transparent and collaborative decision-making processes by engaging members of the organization at all levels. In addition, the CEO will provide leadership to ensure the agency is utilizing existing and emerging technology solutions that address user needs and meet client demands.

Maintain a close working relationship with the Board of Directors

As WestEd has grown and diversified, so has its Board, which has tremendously benefited the organization. A key priority for the CEO will be establishing a strong relationship with its highly committed and influential Board of Directors to facilitate their involvement in strategy, policy decisions, committee work, and organizational development. The CEO’s work includes close collaboration with the Board Chair to cultivate an overall vision for the Board and provide leadership in implementing a long-term strategy for board development, recruitment, engagement, and succession, all aligned with WestEd’s evolving organizational needs. The CEO will communicate openly and candidly with the Board and keep them appropriately informed of organizational developments, seek their advice and counsel when appropriate,

and serve as an effective liaison between Board and staff. In collaboration with legal counsel and alignment with the Joint Powers Agreement provisions, the CEO will ensure the Board adheres to best practices in governance. There is also the opportunity to find more and new ways to bring board members together, engage them, and ensure that their unique contributions and expertise are being maximized.

Qualifications and Characteristics

The successful candidate for the role should possess many of the following skills, abilities, and characteristics:

- An advanced degree or degrees in areas related to WestEd's mission and work and/or extensive, validated, and relevant professional credentials, experience, and success;
- A deep personal interest in and commitment to WestEd's mission and vision;
- Passionate commitment to equity and effectiveness in early childhood and pre-k-16 education; deep knowledge of the education sector;
- Exceptional interpersonal skills and political acumen, with an aptitude for engaging, adapting, and working effectively with a wide range of stakeholders, including practitioners, partners, funders, and state and federal policymakers;
- A demonstrated commitment to diversity, equity, and inclusion; an understanding of its importance to the mission and richness of WestEd and its continued success; experience building and maintaining a diverse, inclusive workplace;
- Strong leadership credentials and ability to understand the critical issues of running and purposefully growing a complex, matrixed organization in the education services industry;
- Experience with external relations, including forming and maintaining strategic partnerships, liaising with government entities, managing in a complex regulatory environment, and representing an organization as its public face;
- Experience working with a Board, engaging in best practices related to governance, and implementing appropriate structures for the organization's needs;
- Ability to identify areas for growth and innovation to advance a bold mission;
- Demonstrated commitment to operational excellence; proven ability to lead operations for a large organization, with a well-honed sense of strategy to set ambitious targets and a plan to reach them;
- Ability to inspire performance and commitment, and to build trust and confidence, at all levels of the organization; possess qualities of relationality, honesty, humility, integrity and courageous leadership that fosters an environment of trust and empowerment; ability to connect with others and create meaningful dialogue;
- An understanding of and demonstrated capability in change management, with the ability to delegate, empower and build consensus;
- Supportive of a culture of staff development and continuous learning, team building, and creating an environment of care and respect; demonstrated success in building and sustaining employee engagement, participatory decision-making, and staff development;

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- Strong political and business acumen, excellent leadership and management skills; experience with diverse organizational income streams, investments, and legal administration;
- Strong written and verbal communication skills necessary to interface across a wide range of audiences effectively; presentation and public speaking experience.

Compensation and Location

Salary will be commensurate with experience and education. The anticipated salary range for this position is \$450,000 to \$615,000 annually. For more detail about WestEd's benefits, please visit: <https://www.wested.org/work-at-wested/benefits/>. The CEO is expected to work on-site at WestEd's San Francisco headquarters.

Applications, Inquiries, and Nominations

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and applications should be submitted via the Isaacson, Miller website for the search: <https://www.imsearch.com/open-searches/wested/chief-executive-officer>. For best consideration, please apply by June 2, 2023. Electronic submission of materials is required.

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