Executive Summaries of Selected Sessions

ICW’s Education and Workforce Summit:
Driving the Debate:
Education and the American Workforce
October 20 – 22, 2008 • Philadelphia, PA • Loews Hotel
# Table of Contents

<table>
<thead>
<tr>
<th>Session Title</th>
<th>Speaker</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Themes from ICW's Education and Workforce Summit</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Opening Keynote</td>
<td><strong>Governor Edward G. Rendell</strong>, Commonwealth of Pennsylvania</td>
<td>3</td>
</tr>
<tr>
<td>The Greening of the American Workforce</td>
<td><strong>Thomas Ginsberg</strong> (Moderator), Deputy Business Editor, <em>The Philadelphia Inquirer</em></td>
<td>4</td>
</tr>
<tr>
<td></td>
<td><strong>David A. Dzombak</strong>, Faculty Director, Steinbrenner Institute for Environmental Education and Research, Carnegie Mellon University</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Andy Van Kleunen</strong>, Executive Director, The Workforce Alliance</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Sandi Vito</strong>, Acting Secretary, Pennsylvania Department of Labor and Industry</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>James Whaley</strong>, President, Siemens Foundation</td>
<td></td>
</tr>
<tr>
<td>Opportunity Cost: Undocumented Students, In-State Tuition, and Financial Aid</td>
<td><strong>Angelo I. Amador</strong> (Moderator), Director of Immigration Policy, U.S. Chamber of Commerce</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td><strong>Eduardo J. Marti, Ph.D.</strong>, President, Queensborough Community College</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>David Shreve</strong>, Federal Affairs Counsel, Education Committee, National Conference of State Legislatures</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Peter A. Zamora</strong>, Regional Counsel, Mexican American Legal Defense and Educational Fund (MALDEF)</td>
<td></td>
</tr>
<tr>
<td>Retooling the Teacher Contract</td>
<td><strong>Frederick M. Hess</strong> (Moderator), Resident Scholar and Director of Education Policy, American Enterprise Institute</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td><strong>Nelson Smith</strong>, President, National Alliance for Public Charter Schools</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>John Wilson</strong>, Executive Director, National Education Association</td>
<td></td>
</tr>
<tr>
<td>Communicating the Competitiveness Agenda</td>
<td><strong>Terrence McNally</strong>, Strategic Communications Consultant</td>
<td>10</td>
</tr>
<tr>
<td>Presidential Candidates' Education and Training Platforms</td>
<td><strong>Arthur J. Rothkopf</strong> (Moderator), Senior Vice President, U.S. Chamber of Commerce</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td><strong>Lisa Graham Keegan</strong> Senior Education Policy Advisor, McCain – Palin 2008 Campaign; Former Arizona Superintendent of Public Instruction</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Jon Schnur</strong> Education Advisor, Obama – Biden 2008 Campaign; Founder and CEO, New Leaders for New Schools</td>
<td></td>
</tr>
<tr>
<td>Biographies</td>
<td></td>
<td>17</td>
</tr>
</tbody>
</table>

These summaries reflect Bullseye Resources, Inc.'s subjective condensed summarization of the applicable sessions from Institute for a Competitive Workforce's Education and Workforce Summit "Driving the Debate: Education and the American Workforce." There may be material errors, omissions, or inaccuracies in the reporting of the substance of the sessions. In no way does Bullseye Resources, Inc. assume any responsibility for the information contained herein, or any decisions made based upon the information provided in this document.
Key Themes from ICW’s 2008 Education and Workforce Summit

Overview
Sustained economic success requires a competitive workforce. A competitive workforce is produced by an educational system that instills in workers the knowledge and skills necessary to compete in the global economy.

The reality is that the United States suffers from a skill gap, a problem that is projected to worsen. The educational system is not equipping students with the skills that are needed, and inadequate retraining is taking place to retool workers to transition from declining industries to future ones. The pending retirement of 78 million baby boomers only exacerbates the problem.

But there is hope. The government and the business community increasingly recognize the significance of the problem. There are examples of programs that are working, and education will be a priority for the next president. It is essential that the business community be engaged in this issue, as education and the skills of the workforce will have a direct bearing on the ability of companies and the country to compete going forward. Business must be heard at both the state and local levels and must be directly involved in helping to solve the problems that exist.

Context
The ICW Education and Workforce Summit brought together a broad group of representatives from chambers of commerce, business, and nonprofits, as well as other leading thinkers on education and the American workforce. Key themes from the Summit are presented below. Executive summaries of each general session follow.

Key Themes
• The country’s broken educational system threatens workforce competitiveness and long-term prosperity.

During the course of this Summit, numerous statistics were shared regarding the workforce skills that will be required in the future. Without exception, projections show a huge gap between the workforce skills that will be required and the skills that exist in the American workforce. Not enough American workers have adequate skills, a problem that is expected to worsen in coming years.

A key part of the problem is the U.S. educational system. Statistics were shared that illustrate what most people know—that the United States is behind other developed countries in high school graduation rates, and in math, science, and reading. If the U.S. educational system is not improved, the country risks having a workforce that is not able to effectively compete in the global industries of tomorrow. As Pennsylvania Governor Edward Rendell said, “If we don’t change [the country’s educational system], we will be a second-tier economic power—you can count on it.”

• Improving competitiveness requires fixing the educational system and retraining many workers.

Throughout the Summit, speakers emphasized the need to fix the ailing educational system to equip students with the skills needed for the jobs of tomorrow (such as those in fast-growing “green” industries).

Among the suggestions at the Summit were targeted investments in early childhood education and strengthening K-12 education by improving the quality of teachers and of teaching, improving assessments, holding teachers and schools more accountable, and expanding charter schools. In addition, access to college, especially community college, needs to be improved by making it more affordable. (This also means making college more affordable for immigrants, including undocumented ones, who already represent a significant portion of the workforce and who—like other Americans—need to upgrade their knowledge and skills.)

“Sustainable economic growth starts in classrooms.”
—Arthur J. Rothkopf, Senior Vice President, U.S. Chamber of Commerce

While improving the educational system is essential, doing so does not address the skill level of those already in the workforce. For the United States to compete in the global economy, the skills of existing workers must be continuously upgraded through lifelong learning. This requires investments to retool many American workers. For many jobs of the future, the requirement is moving someone not from a low-skilled to a high-skilled job, but from a low-skilled to a “middle-skilled” position.

The good news: there are many examples of educational and retraining programs that are working. Efforts need to focus on identifying the successes and securing funds to scale them.

• Improving the educational system and creating the workforce of the future require the active involvement of the business community.

Speaker after speaker mentioned the critical role that the business community must play. The business community must be engaged in this subject and must be part of the conversation and solution at the federal, state, and local level. The business community must communicate with government regarding the importance of this subject (using the communication techniques described on page 10) and must be directly involved in education and retraining programs. Without business's support, this issue won’t get the attention that is desperately needed and progress won’t be made.
Opening Keynote

- Governor Edward G. Rendell, Commonwealth of Pennsylvania

Overview

Education is the key to the country’s long-term economic success. While historically education has been a strength, fueling U.S. prosperity and economic dominance, in recent years the country’s educational system has slipped and the U.S. has fallen behind. For the country to remain economically strong, the educational system must be fixed. There are many areas where smart investments are required, ranging from early childhood development through college. The strong support of the business community is necessary to compel government to make these investments.

Context

Governor Rendell focused on the importance of education in long-term economic development; described steps to reform the educational system; and called on the business community to help improve the educational system.

Key Takeaways

- **The U.S. educational system is in need of repair.**
  Historically the key to the United States’ economic success has been the country’s strong educational system. This served as the foundation for innovation, technological development, and economic prosperity. But the public education system is not working well enough. Currently U.S. high school students rank 14th in the world in scientific achievement, 19th in reading literacy, 15th in math, 19th in graduation rate, and 30th out of 41 countries in problem-solving skills.

> “If we don’t change this, we will be a second-tier economic power—you can count on it.”
> — Governor Edward G. Rendell

- **Education is the key to long-term economic success.**
  There are short-term strategies to improve our ailing economy, like investing in infrastructure and focusing on green-collar endeavors that are estimated to create five million or more jobs. But in the long run, the keys to a viable, competitive economy are knowledge workers and innovators, which result from a strong educational system.

  Private industry begs for more qualified, educated, skilled employees. However, our education system is failing to provide an adequate number of qualified candidates.

- **Smart investments are required to improve the educational system in the United States.**
  The educational challenges that the country faces are not insurmountable. But smart investments must be made.

Other Important Points

- **Patents awarded.** In 2006, for the first time more than 50% of U.S. patents were awarded to foreign nationals or companies.

- **Computers in Pennsylvania.** Pennsylvania has invested $220 million to provide laptops for every 10th, 11th, and 12th grader in core classes. This is engaging students, improving education, and better preparing students for the workforce.

“Spending doesn’t guarantee success, but not spending guarantees failure.”
— Governor Edward G. Rendell

The actions and investments that are required include:

- **Raising high school graduation requirements.** This needs to be front and center.

- **Making more money available for AP courses.** Pennsylvania has provided funds to schools that have strengthened their curricula. (Because schools are locally controlled, states can’t regulate them. But this is an example of how states can use incentives to encourage schools to take certain actions.)

- **Increasing early childhood development programs.** Examples include full-day kindergarten and after-school tutoring programs, both of which are extremely successful. Among kids who participate in after-school tutoring programs, 80% come up to grade level within one year.

- **Increasing pay to teachers.** This is necessary to attract the best and brightest into teaching and to compete with the private sector. In addition, more of today’s best students must go into core fields such as math, science, and computers. It is also important to get more young girls interested in science, math, and technology.

- **Fixing No Child Left Behind.** The only way to figure out which kids are falling behind is through accountability and testing. To make No Child Left Behind successful, the definition of what makes a good school needs to be broadened and it needs to be appropriately funded.

- **Making sure the best and brightest kids go to college.** More loans at more reasonable rates need to be made available to low- and middle-income students.

- **The business community must make education a priority.**
  Businesses often focus on short-term results. But long-term investments in education to create the skilled workforce of the future are a necessity. This must be a priority for business. Business must communicate to government the needs that exist and the importance of investing in education. Without the support of the business community, improving education will not happen.
The Greening of the American Workforce

- **Moderator:** Thomas Ginsberg, Deputy Business Editor, *The Philadelphia Inquirer*
- **Speakers:**
  - David A. Dzombak, Faculty Director, Steinbrenner Institute for Environmental Education and Research, Carnegie Mellon University
  - Andy Van Kleunen, Executive Director, The Workforce Alliance
  - Sandi Vito, Acting Secretary, Pennsylvania Department of Labor and Industry
  - James Whaley, President, Siemens Foundation

**Overview**

As the United States embraces alternative energy and focuses on going green, many "green-collar" jobs will be created. There will be an increased need for everything from highly educated engineers to middle-skilled workers who can install solar panels or new insulation on windows. But there is a significant shortage in the number of qualified candidates for these jobs.

The country as a whole, along with states and communities, must work to create the green workforce of tomorrow. This requires getting children more excited about science and math, but even more importantly, retraining existing workers. Creating a green workforce also requires developing broad environmental literacy.

**Context**

A panel of workforce development experts discussed what can be done to prepare the U.S. workforce for the green jobs of the future.

**Key Takeaways**

- **Creating a green workforce can be achieved by understanding the future skills that will be needed and creating training programs to develop these skills.**

  Sandi Vito described what Pennsylvania is doing to develop a green workforce. The state's efforts recognize that:

  — **Knowledge workers are needed.** The United States will never compete on low-cost labor. Knowledge, skills, and innovation are our competitive advantages.

  — **Lifelong learning is required.** Even if the country improves the K-12 system, due to the pace of technological change many in the workforce will not have the right skills for tomorrow's jobs. Therefore, lifelong learning is required so that people's skills fit the jobs that will be in demand.

  — **Many new green jobs will be created.** As the country becomes more environmentally conscious and areas such as alternative energy take off, numerous new jobs will be created. These include jobs such as energy auditors and solar panel installers.

  — **There will be a shortage of qualified people.** Estimates indicate a shortage of individuals with the appropriate skills for these new green jobs. Efforts are needed to train and retrain workers. In many instances, a person's existing knowledge and skills can be put to use in a green job. For example, HVAC installers can be retrained to install solar panels.

The strategy and process used in Pennsylvania provide a model for other states to learn from. Pennsylvania has formed industry partnerships where businesses in similar industries come together. They define their current and future workforce needs and describe the skills and training required. The state government then invests in programs to train workers for these positions.

This is a win/win/win. Employers win by getting a workforce with the right skills. Workers win by developing skills that equip them to get decent-paying jobs in industries of the future. And, the government wins by facilitating this process and using its funds to develop its workers and its future industries.

> "Our goals are to understand demand, create training programs, and get recently unemployed people into training programs where the jobs are going."
> — Sandi Vito

- **Part of creating a green workforce is preparing the huge number of middle-skilled worker who will be needed.**

Andy Van Kleunen's organization, The Workforce Alliance, is composed of people from local communities: business and labor leaders, and representatives of community colleges, community-based organizations, and public higher education. The Workforce Alliance advocates for public policy that invests in America and builds opportunities for the American workforce.

The members of this alliance want to know what the jobs of the future will be and who will fill them. They believe the country often doesn't pay attention to "innovation jobs" even though this is where the country's competitive advantage resides.

When looking at the expected jobs over the next 10 to 20 years, most of them do not require a four-year college education. But at the same time, they are not low-skilled jobs. About 50% of these jobs are "middle skilled," requiring some training after high school but not a four-year degree. In green industries, it is estimated that 50% to 70% of all jobs will be middle-skilled jobs.

A problem is that a huge number of people in the United States don't have this level of skills. Currently about 80 million people over high school age don't have the skills needed to get a job in the 21st century economy.
The country needs to invest in a targeted way to create the workforce for the industries of the future. This requires investing to train new workers, but more importantly, investing to retrain people by preparing them with new skills for new jobs in new industries. However, over the past six to seven years, 28% to 30% of the federal funding for workforce development programs has been cut. Increasing these investments is critical.

“We have to invest in retraining current workers.”
— Andy Van Kleunen

• Creating the workforce of the future requires getting children excited about math and science.

Jim Whaley conveyed the importance that Siemens places on developing an educated workforce and the numerous initiatives that Siemens supports to achieve this goal. This includes a math and science competition; recognition for outstanding students, teachers, and schools; and scholarships for teachers.

The common theme among these efforts is that they seek to spark excitement in math and science, especially among young students. If students aren’t excited about math and science in third grade, it is unlikely they will become excited about these subjects as they get older.

“We focus on lots of touch points in the educational system to get people excited about math and science.”
— James Whaley

• Creating a green workforce also requires increasing the environmental literacy of all employees.

Professor Dzombak described how his university is thinking about creating a greener workforce. In Professor Dzombak’s view, universities in general, and his university in particular, are doing a decent job of preparing engineers and other environmental experts.

However, Professor Dzombak sees the greening of the American workforce not just in terms of preparing people for specific jobs that are directly related to the environment, but in increasing the environmental consciousness of everyone in the workforce. He sees this as a role for universities to play.

He described that most electrical engineers at his university never take a class that relates to the environment. Yet, these engineers might be involved in developing a new cell phone, which would use materials and resources. Greater environmental consciousness should be a part of their education and should factor into how they do their jobs.

Thus, greater environmental education is required for all employees in all industries. Everyone, including accountants and nurses and scientists, will need to be retrained on ways to generate and use energy more efficiently.

“(The environmental focus of universities should be) getting educated people to think about how the decisions they make impact the environment and energy use.”
— David A. Dzombak

Other Important Points

• Making education a business priority. While businesses are involved in supporting education, some are frustrated with the lack of change. Businesses need to be open to help in ways that administrators think is most beneficial, such as through providing IT or mentoring students. In addition, the business community should be lobbying Congress to put programs in place to help workforce development.

• Lack of alignment. An attendee pointed out the lack of alignment between the education that students are getting and what is needed to fill open jobs. The data he shared was that while 65% of all jobs will require an associate’s degree or an advanced technical degree, only 32% of 9th graders are planning to get these degrees. About 30% of these 9th graders will drop out of high school and not graduate and 28% will go to a four-year college, even though only 20% of jobs require a degree from a four-year college.

• Coal miners as nurses? The state of Pennsylvania has programs to help unemployed workers by retraining them for high-demand jobs. One result is that some former coal miners have been retrained as nurses, since this is a field where there is huge demand. While not for every coal miner, some have excelled in their new profession.
Opportunity Cost: Undocumented Students, In-State Tuition, and Financial Aid

- Moderator: Angelo I. Amador, Director of Immigration Policy, U.S. Chamber of Commerce
- Speakers: Eduardo J. Marti, Ph.D., President, Queensborough Community College
- David Shreve, Federal Affairs Counsel, Education Committee, National Conference of State Legislatures
- Peter A. Zamora, Regional Counsel, Mexican American Legal Defense and Educational Fund (MALDEF)

**Overview**

Close to 75,000 undocumented immigrant students will graduate from American high schools this year. Unless they live in one of ten states that allow undocumented students to receive in-state tuition, they will be shut out from the U.S. higher education system.

This isn't just a moral or a political issue; it is an economic one. Immigrants, including undocumented ones, already play a huge role in the U.S. workforce and this role will continue to grow. It is in the country's best interests that these individuals have more education and skills. Needed are changes in state and federal policies. Passage of the DREAM Act represents a good start along the road to comprehensive immigration reform. In the near term, state legislatures can make in-state tuition available. Also needed is financial aid. Because this is an important workforce issue, the business community should be engaged, communicating the importance of the issue, especially to state governments.

**Context**

This panel described the issues related to in-state tuition and financial aid for undocumented students, assessed how this affects workforce competitiveness, and shared their views on the role of the business community in changing current government policies.

**Key Takeaways**

- Providing in-state tuition to undocumented students is good for society and boosts workforce competitiveness.

David Shreve explained that states are in a difficult position. A 1982 Supreme Court ruling required schools to educate all children, so as to avoid a two-tiered system for immigrants without documentation. But in 1996, federal legislation said that states cannot provide a tuition benefit for aliens with illegal status. So, what are states to do?

To date, ten states have passed legislation providing in-state tuition for undocumented immigrants. These states are New York, California, Texas, Illinois, Kansas, Nebraska, New Mexico, Oklahoma, Washington, and Utah. The diversity of states shows that this type of legislation makes sense broadly and can be passed anywhere. All of the panelists support the idea of providing in-state tuition to undocumented immigrant students.

Mr. Shreve's organization (the National Conference of State Legislatures) sees this primarily as a states’ rights and federal pre-eminence issue. In his organization's view, the federal government made a mistake in its 1996 legislation; instead, the decision of how to educate children should be left to the states. At the state level, he believes the right approach is to conduct a financially focused cost/benefit analysis. He argued that such an analysis would show that it is beneficial for states to provide undocumented students with the opportunity to go to community college. College-educated workers earn more money and therefore pay more in taxes, meaning more revenue for states.

Peter Zamora doesn't see in-state tuition for undocumented students as controversial. In his view, the parents of these students have paid taxes and the student should receive in-state tuition from the state in which the student graduated from high school. (When the laws in the ten states have been challenged by those in the anti-immigration camp, the courts have usually thrown out the cases as lacking standing.) From society's perspective he sees prohibiting these students from attending college as in-state students as hurting workforce competitiveness.

“This is a workforce competitiveness issue. It [lack of in-state tuition for undocumented students] is like excluding an entire class. It will hurt competitiveness.”

— Peter A. Zamora

Eduardo Marti looked at this issue from two perspectives;

— Practical. The composition of the U.S. workforce is changing dramatically, requiring an examination of the skill level and competitiveness of the workforce. Specifically, the birth rate in the United States is down 17% since 1990, but immigration has increased. Today, 33 million people in the U.S. were born in a different country; 12 million of them are undocumented, most are post high school age. (Most of these people are located in California, Texas, Florida, and New York). Providing these immigrants (both those who are documented and those without documentation) with access to community college at an affordable rate is beneficial to the individual, the workforce, and the country.

— Political. These undocumented immigrants are not going to go away. Making life difficult for them will not cause them to leave the U.S. They came here because conditions in their countries were terrible, and they saw the potential for jobs and opportunity in the U.S. Denying them access to public education, particularly community colleges, means creating an underclass of people who will never be as productive and won’t contribute to society as much as they possibly could.
Beyond just granting in-state tuition to undocumented students, many of these students also need financial aid. Dr. Marti pointed out that tuition at his community college is $2,800 per year. While this may not seem like a great deal of money, to many people it is a significant amount and presents a barrier to furthering their education. (Of the 13,000 students at his school, 46% were born outside of the United States and 690 are undocumented.)

The financial challenges faced by undocumented immigrants in getting an education further illustrate the importance of receiving in-state tuition, and also point to the need for financial aid. Outside of the ten states that provide in-state tuition, these students are largely shut out of the higher education system.

"Except for the ten states with in-state tuition, the door is shut. They [undocumented students] get through high school and can’t afford community college. The path ends.”
— Eduardo J. Marti

The reality is that financial assistance is needed for many students. This could come through government assistance, as well as through private scholarships from individuals and businesses. (Information on scholarship resources is available at www.maldef.org.)

Passage of the DREAM Act would be a great step along the road to comprehensive immigration reform. The DREAM Act grants conditional legal status for students who have been in the country for five years or more, have no criminal background, have graduated from an American high school, and have been accepted to a college or university or into military service. Under the proposed Act, after the completion of two years of higher education or military service, the student can be granted legal permanent resident status.

While this bill had bipartisan support, including support from both Barack Obama and John McCain it has failed to pass due to the opposition of anti-immigrant forces. (DREAM Act legislation is likely to be reintroduced in 2009.)

"If the intent is having a non-competitive underclass, then we should keep our current policies. If the goal is to provide opportunities, then we need to support the DREAM Act.”
— David Shreve

The U.S. Chamber of Commerce did not oppose the DREAM Act, but did not support the Act as previously written. The reason: in the Chamber’s view, it was too narrow. The Chamber’s position has been that the Act should allow for other options beyond just serving in the military or attending a college or university, such as a trade apprenticeship. The Chamber hopes that future iterations of the Act will broaden its scope.

The longer-term desire among the panelists is for comprehensive immigration reform. The panelists were in agreement that the current U.S. immigration laws and system are antiquated. For example, there are only 5,000 visas each year for low-skilled labor and the country caps for countries such as Mexico, India, and China are quickly reached. The process for becoming a citizen is long and expensive. However, due to other priorities and the contentiousness of this subject, the panelists don’t see comprehensive immigration reform as a priority for the new administration.

The business community must be engaged in this issue. The future workforce of America depends on immigrants, including currently undocumented immigrants. For this reason, the business community must be engaged in this issue. While comprehensive national immigration reform is needed, success is likely to occur more quickly at the state level. The business community should engage with the state legislatures, especially in states that don’t currently provide in-state tuition to undocumented students.

Other Important Points

Community college importance. Nationwide, almost 50% of those enrolled in college are enrolled in community colleges. Many of these individuals are minorities. Community colleges are training people in a wide variety of fields, including firefighters, police officers, nurses, and many entry-level positions.

"The community college is the Ellis Island of the education system.”
— Eduardo J. Marti

The Strengthening Communities through Education and Integration Act. This is a bill that has been introduced with bipartisan support that provides tax incentives to businesses that provide educational programs to employees in areas such as English as a Second Language, civics, and safety. The U.S. Chamber of Commerce supports this bill because it is a workforce development issue. Wal-Mart, Marriott International, and many other companies such as those in the construction industry also strongly support this bill.

Immigration opposition. There is a strong anti-immigration movement in the U.S. This includes opponents to immigration from the political right who want to create barriers for immigrants and send them home, and from the left who fear that immigrants are threatening the jobs of U.S. workers. CNN’s Lou Dobbs is a leading cheerleader of the anti-immigrant group. These forces often spread untruths, such as that immigrants commit more crimes. (In fact, immigrants commit fewer crimes.) The attitude of anti-immigrant groups has led to an increase in hate crimes against Latinos. A site www.truthinimmigration.org has been established to provide accurate data about immigrants and immigration.
Retooling the Teacher Contract

- Moderator: Frederick M. Hess, Resident Scholar and Director of Education Policy, American Enterprise Institute
- Speakers: Nelson Smith, President, National Alliance for Public Charter Schools, John Wilson, Executive Director, National Education Association

Overview
In this session, there was agreement that the American educational system needs to be revamped. There was also agreement on the need for schools to become mission-driven organizations, with teachers brought into and focused on achieving the mission.

However, there was disagreement on the best approach for getting there. John Wilson from the NEA favors schools, districts, and teachers establishing a common vision. He supports collective bargaining and assessing teachers on their practices and processes.

Nelson Smith of the National Alliance for Public Charter Schools championed the flexible manner in which charter schools operate, with flexibility in hiring and firing teachers, an emphasis on outcomes and performance, and the flexibility to adjust compensation on a per-school basis.

Context
This panel, with a representative of the nation’s largest teachers’ union and a representative from the nation’s largest alliance of charter schools, discussed the challenges facing the U.S. educational system and how to go about solving these problems.

Key Takeaways
- Traditional public schools and charter schools have very different perspectives on the need for and value of contracts and collective bargaining.
  
  In John Wilson’s view, collective bargaining—which exists in some form in 42 states—is a way of “leveling the playing field” between teachers and management; it gives teachers a voice. In most states where collective bargaining takes place, it is limited to wages and working conditions. The NEA is involved in negotiating about 10,000 contracts per year, and there are many differences from contract to contract. Some contracts do a great job of focusing on student learning, while others tend to focus more on what is good for teachers.

  In contrast, as Nelson Smith explained, charter schools generally don’t engage in collective bargaining; the teachers at most charter schools are not unionized. They often have one-page agreements stating that they are at-will employees. Despite this, recruiting highly qualified teachers has not been an issue for most charter schools. Teachers who choose to work at charter schools do so for reasons other than the long-term job security; specifically, they want to work in schools that serve low-income students and have a culture of learning and they are attracted by working with people who share the same passion. Mr. Smith gave an example of one charter school that receives 100 applications for every job opening.

  Both panelists agreed that schools and teachers must have a “mission-driven approach”—which traditionally has not been the case for public schools. Most public schools do what they set out to do 50 years ago; while society has changed, schools have not kept pace. Needed in each school district is a clear statement of the purpose of the schools, the mission, the vision, and the values. Getting all parties to agree on these elements can go a long way toward solving the problems that exist.

  “Public schools never ask, ‘What’s our mission? Our vision? Our values?’”
  — John Wilson

  In Mr. Wilson’s view, transforming public schools doesn’t mean moving away from teacher contracts—it means redesigning the entire system.

  - The panelists disagreed on paying teachers differently based on the performance of students on tests.

  The NEA is opposed to compensating teachers based on how well students perform on tests, which is an “output.” Their view is that teachers can’t control the outcomes, which are influenced by multiple factors such as student effort and parent involvement. Instead, the NEA believes the focus should be on the practice of teaching and the processes associated with teaching (the “inputs”). It may be appropriate to reward teachers based on the processes they use in teaching.

  “To improve outcomes, we need to improve the practice of teaching, to improve processes.”
  — John Wilson

  Mr. Wilson also noted that using test scores to assess teachers can backfire. He has seen situations where a district desires to terminate a teacher viewed as a poor performer, but if this teacher’s students have good test scores (which may not be related to the competency of the teacher), it will be very difficult to dismiss the teacher.

  Mr. Smith disagreed. He believes that teachers should be measured based on outcomes, as is done in other professions, and that compensation can be tied to performance. Charter schools generally have the flexibility to reward teachers who consistently improve student performance over time. Despite Mr. Wilson’s contention that tools to assess teachers are lacking, Mr. Smith believes there are assessment tools that can measure a teacher’s ability to improve student performance over time. The key is not to take a snapshot of performance at a moment in time, but to assess the level of student performance when a
teacher starts working with a group of students and to again assess student performance at a later point. This demonstrates the teacher’s impact in helping students grow.

“We have to look at outcomes . . . it is possible to assess change and progress over time.”
— Nelson Smith

The panelists also had different perspectives on whether districts might pay math and science teachers more than teachers in other subjects.

Mr. Wilson supports raising the pay of all teachers, but is not in favor of paying more to teachers of some subjects. He argued that education is about educating the whole student, which makes it difficult to say that a physics teacher should be compensated more than an English teacher. Also, differential pay would undermine the collegiality of the teaching environment. (Instead of paying math and science teachers more, he would rather invest in recruiting these teachers, possibly even paying for part of their college education.)

The philosophy of charter schools is not to have some broad policy on compensation, but to have flexibility to do what is necessary in a certain school at a certain time.

- **No one wants bad teachers. The panelists had different perspectives on how to avoid them.**

  Mr. Wilson believes that the most important time to weed out poorly performing teachers is early in their career, during their probationary period. However, even after a teacher has achieved "career status" (tenure) it is still possible to dismiss a poorly performing teacher. The difference is that for those who have achieved career status, the school must show that the teacher is not competent and must afford the teacher due process.

  Mr. Smith sees tenure for teachers as an outdated concept and believes that attaining tenure is often not a rigorous process. There aren’t other careers where employees are guaranteed a job for life after a short probationary period. Keeping one’s job should be based on continuing to perform well. Charter schools do not provide tenure. Each year principals can decide whether or not to retain a teacher. Because some teachers aren’t necessarily the right fit for a charter school, in a charter school’s early years the turnover rate tends to be about 15–20%.

  “Continuing employment should be based on performance.”
  — Nelson Smith

**Other Important Points**

- **School performance.** Data shows that students in public schools outperform students in charter schools in math and reading by approximately 5 percentage points. Mr. Smith views such data as misleading. First, charter schools often take in students who have performed poorly in public schools. More importantly, numerous studies show that students in charter school improve at a faster rate than those in public schools.

- **Innovation.** The NEA initially supported charter schools, seeing them as a source of innovation. However, Mr. Wilson doesn’t believe that to date charter schools have produced the types of educational innovations that were expected.

- **Adjunct teachers.** With the crisis in finding qualified math and science teachers, one potential idea is to enlist qualified retirees, such as individuals who were scientists or engineers, to come into schools as adjunct teachers. Mr. Smith indicated that charter schools are open to ideas such as this. Mr. Wilson said that the NEA is open to creative ideas, but teaching isn’t just a matter of having subject expertise. Teachers need to know how to write lesson plans and know how to manage a classroom, and require some degree of oversight.

- **Card check legislation.** Card check is proposed legislation that makes it easier for employees to unionize. While most teachers are unionized, many support professionals, such as bus drivers, are not. Mr. Wilson and the NEA support this legislation. Mr. Smith and most charter schools oppose it.
Communicating the Competitiveness Agenda
- **Speaker:** Terrence McNally, Strategic Communications Consultant

### Overview

Storytelling is the most powerful communications tool that exists. Well-told personal stories engage emotions and deliver meaning. Developing concise and compelling stories is essential for leaders of organizations who need to communicate important information and persuade others, especially policymakers.

There are specific techniques and practices for creating good stories that can be learned, applied, and practiced. Using these techniques can result in creating great stories, telling great stories, and ultimately using these stories to achieve one's objectives.

### Context

Mr. McNally described the power of storytelling and provided advice for how organizations can craft and tell persuasive stories.

### Key Takeaways

- **Stories are important for multiple reasons: they convey history, identity, and culture, and are how we remember.**
  
  Stories are part of our nature and our culture. The key reasons that stories are so critical are:
  
  — **History.** Going back to the times of cavemen sitting around campfires, stories are how information is transferred; they are how one generation teaches the next about history and survival.
  
  — **Identity.** Stories are told to describe and define ourselves. We tell stories on dates and business meetings to give others a sense of who we are.
  
  — **Culture.** Stories convey the narratives of the cultural elements that people agree on. Former Labor Secretary Robert Reich wrote a book where he identified four stories that define American culture:
    
    1. **Mob at the gates.** This is the story about a threat that is trying to destroy the American way of life.
    
    2. ** Triumph of the individual.** This is the story of the individual who overcomes obstacles to fulfill the American dream (Horatio Alger).
    
    3. **Benevolent community.** This is the story of people in America taking care of each other, epitomized through a barn raising.
    
    4. **Rot at the top.** This is the story of people at the top who are dishonest. (Watergate, Enron).

  When telling a story, a person or organization should try to tap into one of the narratives that Americans already believe in.

  — **Memory.** Stories help people remember.

  > "If you want someone to remember your facts, put them in a story."
  > — Terrence McNally

- **Good stories have a time-tested structure that engages emotions and delivers meaning.**

  Simple retelling a sequence of events is not a story. A good story has the following elements:

  — **Introduction of a protagonist.** This should be an individual (not an organization) who people can identify with, relate to, and root for. Give enough information about who the protagonist is and what his or her life is like so that people have a sense of knowing the protagonist.

  — **Introduction of an inciting incident.** Something must happen to the protagonist while in the pursuit of a goal. The protagonist must encounter barriers and obstacles.

  **Stories are the most powerful way to communicate and persuade.**

  People and organizations want their voices heard. They want to educate others about their organizations and convince others to support their points of view. The most powerful way to communicate is not through a speech or through sharing data; it is by telling a story, a narrative. The best stories are not about an organization or an idea. They are personal stories.

  > “Storytelling is the most powerful form of human communication.”
  > — Terrence McNally

  Two important considerations:

  — **Combine a story with data and a policy recommendation.** Too often presenters overwhelm their audiences with data, which is a mistake. An effective approach is to open a presentation with a specific, personal story. Then, provide key data and facts, possibly even just one critical piece of data. (Telling a story upfront makes people more receptive to the facts; the facts will be seen as supporting the story.) And then, offer a policy recommendation, linking the story and the data to a clear statement of “here's what we need to do.”

  — **Create an overarching story.** It is critical for organizations to have individual, personal stories. But first, organizations must define their overall narrative, their overarching story. With this larger narrative defined, multiple individual stories can support the overarching story.
— Resolution. The protagonist overcomes the barriers in achieving his or her goal. It is how the hero gets through the barriers that gets listeners' emotions involved.

In addition to following this pattern, good stories have the following qualities. They:

• Connect us and invite us.
• Express and evoke emotions. They touch us.
• Remind us of our own stories.
• Build relationships and trust.
• Are concise, but colorful and compelling. Stories are made colorful by providing a few select details.
• Are repeated.
• Are told in the language of the audience. (A good storyteller adapts a story to fit the audience.)
• Are not predictable.
• Contain truth. This doesn’t necessarily mean they are factually accurate, but they are authentic and resonate.
• Are infused with meaning. A good storyteller is overt in pointing out the meaning of his or her story (perseverance, teamwork, courage, etc.) to make sure that others get it.

“A good story is concise enough to be repeated and colorful and compelling enough that someone chooses to do so.”
— Terrence McNally

Organizations can put stories to work to help the organization achieve its goals.

Whether the goals of an organization include attracting members, raising money, and/or influencing policy, storytelling can play a key role in helping to achieve these goals.

Organizations should undertake a process of proactively collecting stories that can be used for a variety of purposes. Some of the best types of organizational stories include the:

— How we got started story
— Nature of our challenge story
— Emblematic success story
— Individual success story
— Lessons from defeat/failure story
— Where are we going story

A quick review of various local Chamber of Commerce websites shows that local Chambers have the ammunition to create outstanding, compelling stories. Each Chamber should go through a process of collecting its best stories.

“In the long run, numbers numb, jargon jars, and nobody ever marched on Washington because of a pie chart. The most powerful communications tool we all have is the simplest one: compelling human stories.”
— Terrence McNally

Other Important Points

• There is a dark side to storytelling. Legislation is passed constantly purely for anecdotal reasons. Elected officials seem to be easily swayed by stories. It seems that staffers are more interested in data.

• Storytelling and the election. Both candidates appear to have used storytelling equally well. John McCain and Sarah Palin are both defined by their personal stories: POW and hockey mom. Barack Obama has also done well defining his personal story, mostly through the book he published.

• Sacred bundles. A sacred bundle is a small set of artifacts that a person carries which him or her to be reminded of their purpose. For example, famed anthropologist Jane Goodall travels the world, speaking about 200 times per year about protecting chimpanzees. When once asked how she remains motivated and doesn’t give up hope, Goodall referred to her sacred bundle, which had three artifacts that reminded her of her mission. Mr. McNally’s sacred bundle is the stories that organizations have created after hearing him speak.

• Additional information. Mr. McNally supplied questions to sharpen your stories, tips, and resources. These are provided on the following page.
Questions to Sharpen Your Stories

1. What changes in the course of the story? What questions get answered?
   • Show us something or someone at the top that changes by the end and/or raise a question (or questions) that gets answered in the course of the story.

2. Who’s the protagonist?
   • Stories need someone -- either an individual or group -- to drive the action.
   • Provide description or background that allows us to see a flesh and blood human being.

3. Have you created a world?
   • People instinctively want to know who, where, when, what, why.
   • Supply a little description up front fixing the story in time and space.

4. What’s the hook?
   • Hook the audience right from the start by beginning the story in a place where the audience can identify with the situation or the protagonist’s goal.

5. What keeps it interesting?
   • Predictable stories are boring. If your story lacks obstacles, what can you do to make the straight-line pursuit more interesting?

6. Where’s the conflict?
   • There is no drama and little comedy without conflict. It helps to have clearly defined heroes and villains with different notions of how the story should end.

7. Do you have telling details?
   • A single telling detail can replace a paragraph of description by vividly and concisely painting a picture of the world you’re describing.

8. Have you created scenes to bring the characters and the story to life?
   • Ingredients: time, place, circumstances, characters, action, (and if possible) dialogue

9. Are you tapping emotion?
   • An audience subconsciously enters into a contract with the storyteller: They want an emotional experience that makes the time worthwhile.

10. Is the meaning clear?
    • If not, how can you make it more explicit without “spoon-feeding” the audience?

11. Are you showing rather than telling?
    • Show what is happening. Don’t tell about it from a “safe distance.”
    • Don’t let important action happen “off-screen.”

12. Are you speaking in the language of the audience

Ten Tips for Storytellers

1. Stories are about people. (And people have names – even if you have to make them up.) Instinctively, your audience will want to know whom they will be following on this particular journey, and they also will want a mental picture of that person, so it helps to provide at least a few physical details.

2. One or more of the people in your story has to want something: to do something, to change something, to get something. A story doesn’t really get started until the audience knows what the goal is and has a reason to care whether or not it is attained.

3. Stories need to be fixed in time and space. Audiences don’t need every detail, but they want to know: was this last week or 10 years ago? Are we on a street corner in Boston, a Wal-Mart in Iowa, or somewhere else?

4. While people in a story pursue a goal, they tend to talk. Direct quotes let the audience hear your characters’ unique voices, bring the audience into the action (which is precisely where you want them), and lend urgency to storytelling.

5. Audiences bore easily. Your story has to make them wonder, “What happens next?” or “How is this going to turn out?” As the people in your story pursue their goal, they have to run into obstacles, surprises, or something that makes the audience sit up and take notice.
6. **Stories speak the audience’s language.** They are colorful (thanks to telling details), concise, and clearly understandable.

7. **Stories stir up emotions.** Human beings (which should comprise the majority of your audience) will not think about things they do not care about. So you have to make them care before you can get them to think about your issue. That’s the test your story has to meet.

8. **Stories don't tell: they show.** Intellectually, your audience will understand a sentence such as, “She felt hostility from the family.” But when you write, “The family wouldn’t look her in the eye,” your audience will see the moment and feel the family's anger.

9. **Stories have clear meaning.** When the curtain comes down, your audience should know exactly why they took this journey with you.

10. **Stories are containers of truth.** At their essence, the best stories are about how we should treat ourselves, how we should treat other people, or how we should treat the world around us.

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**Resources for Further Learning**

*Storytelling as Best Practice* by Andy Goodman, available at agoodmanonline.com

*Free Range Thinking* A free monthly newsletter by Andy Goodman, available at agoodmanonline.com

*The Triumph of Narrative* by Robert Fulford, “Story telling is an attempt to deal with and at least partly contain the terrifyingly haphazard quality of life.”

*The Story Factor* by Annette Simmons, “In a complex environment, people listen to whomever makes the most sense -- whomever tells the best story... Facts don’t have the power to change someone's story. Your goal is to introduce a new story that will let your facts in.”

*Whoever Tells the Best Story Wins: How to Use Your Own Stories to Communicate with Power and Impact* by Annette Simmons, “Storytelling transports people to other points of view so they can reinterpret or reframe what your ‘facts’ mean to them.”

*Storytelling in Organizations* by Yiannis Gabriel, “Storytelling comes to the rescue of meaning in an epoch saturated by information in which meaning is constantly displaced and crowded by noise.”

*Storytelling For Grantseekers: The Guide to Creative Nonprofit Fundraising* by Cheryl A. Clarke

*The Elements of Persuasion: Use Storytelling to Pitch Better, Sell Faster & Win More Business* by Richard Maxwell and Robert Dickman, “A story is a fact, wrapped in an emotion that compels us to take an action that transforms our world.”

*All Marketers Are Liars: The Power of Telling Authentic Stories in a Low-Trust World* by Seth Godin

*Story: Substance, Structure, Style & Principles of Screenwriting* by Robert Mckee

*Screenplay: The Foundations of Screenwriting; A step-by-step guide from concept to finished script* by Syd Field
Presidential Candidates’ Education and Training Platforms

- **Moderator**: Arthur J. Rothkopf, Senior Vice President, U.S. Chamber of Commerce
- **Speakers**: Lisa Graham Keegan, Senior Education Policy Advisor, McCain – Palin 2008 Campaign; Former Arizona Superintendent of Public Instruction
  Jon Schnur, Education Advisor, Obama – Biden 2008 Campaign; Founder and CEO, New Leaders for New Schools

**Overview**

Senators John McCain and Barack Obama agree that the state of education in America presents dire problems that threaten the nation’s economic competitiveness and limit what is achievable by its citizens and enterprises. The situation is both “morally unacceptable and economically untenable,” said Obama advisor Jon Schnur. “It’s not a matter of whether the U.S. is going to fall behind other industrialized nations in education,” said McCain advisor Lisa Graham Keegan. “We’ve fallen.”

Both presidential candidates call for bipartisan unity and innovative partnerships to address a priority that transcends politics. Both agendas would focus on implementing programs that work and rooting out those that don’t. Both candidates plan to institute changes that improve teacher quality, focus on school assessments and accountability, and encourage parental responsibility. The major differences in the two approaches lie in the candidates’ specific solutions at each educational level and a fundamental divide on whether additional funding is necessary to effect sufficient change.

**Context**

Mr. Rothkopf led the education policy advisors for Senators Obama and McCain in a discussion outlining the presidential candidates’ education agendas.

**Key Takeaways**

- **Senator Obama would revitalize the American educational system via investment in solutions that work.**

  For Senator Obama, education will be one of his top three domestic priorities. During the campaign, he made 12 education speeches and proactively raised education in all three presidential debates.

  “Education is a passion for Senator Obama. . . . It’s personal for him. He thinks that every student ought to have the same kind of opportunities that he’s had to get a quality education.”
  — Jon Schnur

  Senator Obama believes the state of education in America is problematic both morally and economically. The United States has toppled from #1 in college graduation rates to #15. The country lags other industrialized nations in high school graduation rates and in science and math achievement.

  Some argue that more money will solve the country’s educational problems; others say that no additional spending is needed—only more accountability. Senator Obama’s philosophy combines a blend of targeted investment, reform, accountability, and an emphasis on what works. His education policy focuses on four areas:

  — **Early childhood education.** Senator Obama would close the huge gap between the number of U.S. children who need early childhood education and those who get it, via a $10 billion investment that would make high-quality early childhood education more accessible to low-income families. Both Head Start (for which funding has been frozen for years) and state-system programs would benefit. Research has shown clear links between high-quality early education programs and kids’ educational outcomes, as well as clear returns on investment in such programs (with every $1 dollar invested saving $7 over time).

  — **K-12.** America’s high school and college graduation rates have slipped dramatically despite the income advantages of a degree (college graduates earn twice as much as high school grads and triple what dropouts make). The world’s fastest-growing economies are succeeding in part because of long-term investments in education. Clearly, America needs to do the same. Better outcomes are achievable, believes Senator Obama, via both investments and reforms focused on:

    - **Teaching quality.** Senator Obama wants to attract and retain talented teachers, lifting up the profession to the revered status it holds in other societies. Investments in teaching quality would include upgrading training and creating career ladders.

    - **Expanded charter and other schools.** This is an area where additional targeted resources are needed to help low-income kids succeed, with more extended learning time and a major focus on science and math education and achievement.

  — **Higher education.** Some 75% of occupations in the U.S. require some post-secondary education, and economists
Driving the Debate: Education and the American Workforce

Senator McCain’s reforms would focus on accountability, assessment, and innovative partnerships to create solutions that work for kids. Some reforms will be controversial, but the time has come, Senator McCain believes, to get past the barriers that prevent America from having excellent teachers, to bring more choice to parents, to set aside political differences, and to unite parents can help advance national education objectives.

— Personal responsibility. Throughout Senator Obama’s education agenda is a focus on implementing what is proven to work, terminating what doesn’t work, and keeping a close eye on results. Such a focus depends on those in government acting with responsibility. That is the same responsibility he demands of himself and will request from parents, via the bully pulpit. Senator Obama has pledged to give an annual State of American Education report to the public (which no U.S. President has ever done) in which he will outline how parents can help advance national education objectives.

• Senator McCain’s plan to revitalize education entails reforms, but no further funding.

Senator McCain also believes American education is in trouble, with potentially dire ramifications for U.S. competitiveness, but he sees a way out of the morass that does not involve spending more. At a time of high expense for the federal government, Senator McCain would freeze domestic spending and take measures to ensure that every dollar invested goes to programs that function well.

"Senator McCain does not believe we will solve these difficulties with just further investments, with just a little bit more money, a little bit more of what we were doing before."
— Lisa Graham Keegan

Senator McCain’s reforms would focus on accountability, assessment, and innovative partnerships to create solutions that work for kids. Some reforms will be controversial, but the time has come, Senator McCain believes, to get past the barriers that prevent America from having excellent teachers, to bring more choice to parents, to set aside political differences, and to unite around what is in the best interest of kids. Some highlights of Senator McCain’s education agenda:

— Preschool reforms. These would raise and standardize the quality of teaching. A strong connection exists between high-quality preschool and long-term educational outcomes. Yet there is a huge quality chasm among preschools in America today. Problems include: 1) many preschool "teachers" are not qualified to prepare kids for kindergarten, lacking language skills and educational training (early education centers in urban settings are often jobs programs that place unskilled workers); 2) there is aversion to testing kids at this age; testing is perceived as running counter to nurturing. But, testing can and should take place in preschools. Senator McCain’s plan would institute assessment standards and certification or degree requirements for preschool teachers.

— K-12 reforms. Senator McCain’s K-12 plan focuses on:
  • Improving teaching quality. This can be done by giving principals more flexibility to hire the best qualified teachers and terminating ineffectual ones.
  • Gauging achievement. There are ways to assess if teachers are effectively moving students along.

  “The job of a teacher is moving kids along. If the child is unfortunate enough to be with a teacher who can’t make that movement three years in a row, [lost progress] is almost unrecoverable. . . . It’s devastating.”
— Lisa Graham Keegan

• Increasing parental responsibility. Like Senator Obama, Senator McCain feels strongly about the need for parents to take personal responsibility for education and be serious with their children about the importance of education.

• Increasing parental choice. Senator McCain has a different vision for what a school district can be. Districts would not assign children to specific schools. They would have a sufficient number of schools, including charter schools, and parents and students could choose which schools to attend.

• Helping high school seniors transition into the next phase of their lives. The educational system should do a better job of connecting students with what comes after high school. This might mean receiving vocational training at community colleges, taking college courses in advance (defraying later costs), or starting military training. The fourth year of high school should change to increasingly focus on facilitating the transition to adulthood—mitigating the time and money lost when graduates wonder what comes next.

  “There should not be this transition that is the end of high school and then deciding what to do next. That ought to be taken care of in high school.”
— Lisa Graham Keegan

— Higher-education reforms. These would focus on simplifying the grant process to make grants and loans more accessible. There are too many different government grant programs. Consolidating and simplifying their processes could save an estimated $3 billion—money that can allow more grants and loans to be offered.

• Both similarities and differences emerged in the candidates’ approaches during the Q&A session.

Questions from Mr. Rothkopf and the audience covered a range of topics, including the following:

Q: How can educational reforms help fill the U.S. economy’s need for more qualified STEM (science, technology, engineering, and mathematics) professionals?
Senator McCain would have a White House person dedicated to science and technology in the United States. He also proposes to improve the quality of STEM teachers by recruiting students for teaching from the top 25% of university classes and paying teachers more. One idea to broaden the pool of qualified candidates is to require high school students who receive scholarships to study pedagogy in addition to other subjects. The message to these top students is that they should consider teaching at some point in their lives.

Senator Obama also favors strengthening teaching, particularly in the STEM subjects. He supports programs that provide scholarships for those who become teachers in math and science, as well as programs that encourage retired science, math, and engineering professionals to become teachers. (He has firsthand experience, having seen successful programs of this type in Chicago.)

Q: How would the candidates change the accountability provisions of No Child Left Behind?

Senator Obama has not called for eliminating No Child Left Behind. He is strongly supportive of the goals of the legislation, specifically high standards and accountability. But, this program has low approval across the country and there is much that needs fixing. In particular, the amount of investment has been lacking, which has prevented upgrading the teaching force. Said Mr. Schnur, “It's hard to reach high standards if you don't invest.” In addition, high-quality assessments are needed.

Senator McCain sees no need for additional funding—since federal funding for education has increased tremendously in recent years—but he is in favor of reallocating existing funding into more operational areas of education, such as technology. He would keep in place the No Child Left Behind requirement that states have standards, would keep in place annual assessments, and would encourage voluntary benchmarking (as opposed to national standards). What he would want to change is the use of a “progress formula” that measures student progress. (Senator Obama agrees with focusing on growth and improvement.) Also, Senator McCain would want to change the speed with which funding is made available to students for intervention and tutoring when a school is failing.

Q: Would either candidate promote a move to regional or national standards for No Child Left Behind?

No. Both senators see standards as a state responsibility.

Q: In communities with high private-school enrollment, how can support for public education be promoted among parents “without skin in the game”?

Senator Obama would use the bully pulpit to engage all Americans to support public education—which in effect is supporting society’s civic health and economy. Senator McCain’s vision of public education is where dollars for kids are equitably available to them and they can choose which schools to attend.

Related to this issue, the candidates have differing perspectives on vouchers. Senator McCain favors vouchers, as they expand parental choice. Senator Obama does not think vouchers work to improve the quality of public education (Milwaukee was cited as a case in point).

Q: What would change in either administration in terms of adult education and partnering with the business community to educate adults?

Both candidates favor job partnerships among businesses and community colleges that focus on job training. Community colleges require stronger political advocates so that they aren’t short-changed on government funding, Senator McCain realizes. Senator Obama’s focus on higher-education affordability and teaching quality reforms would bring community colleges more and better-prepared students. Both candidates support online education as well.

Q: What would change in either administration in terms of adult education and partnering with the business community to educate adults?

Quality instruction, re-envisioned school systems, much higher pay for teachers—all of the elements of the education model Senator McCain envisions will help the U.S. educational system turn out more highly qualified graduates.

Senator Obama will galvanize the business and educational communities to forge innovative partnerships that find solutions to meet companies’ future needs for a well-trained, highly skilled workforce.

Q: Do the candidates see a potential role for private providers of education?

Yes. Both candidates believe that private companies can play a role in education.

Other Important Points

Biographies

Summary 1
Opening Keynote

Governor Edward G. Rendell
Commonwealth of Pennsylvania

Edward G. Rendell, Pennsylvania’s 45th Governor, began a second term of office on January 16, 2007, following a landslide re-election victory. As Governor, Rendell serves as chief executive of the nation’s 6th-most-populous state and oversees a $28.3 billion budget.

Governor Rendell’s unprecedented strategic investments have energized Pennsylvania’s economy, revitalized communities, improved education, protected the environment, and expanded access to health care to all children and affordable prescription drugs for older adults. He championed and signed into law Pennsylvania’s first comprehensive measure to substantially reform the local tax system by providing urgently needed property tax relief to homeowners. In 2008-09 taxpayers will save nearly $800 million in the first year of statewide property tax relief from gaming revenues. In addition, Governor Rendell won passage of the landmark Growing Greener 2 environmental investment package. The $625 million initiative is cleaning up rivers and streams, improving parks, returning abandoned industrial sites to productive use, protecting open space, and preserving farmland.

The Governor and his wife, First Lady Marjorie O. Rendell, a judge on the U.S. Court of Appeals for the Third Circuit, have a son, Jesse. They celebrated their 37th wedding anniversary on July 10, 2008.

Summary 2
The Greening of the American Workforce

Thomas Ginsberg (Moderator)
Deputy Business Editor, The Philadelphia Inquirer

Thomas Ginsberg, a Deputy Business Editor (since February 2008) at The Philadelphia Inquirer, has been a journalist for two decades and has reported from more than 20 countries on business, politics, crime, revolutions, wars, society, and culture, all manner of disasters and various oddities of human nature.

Prior to working at the Inquirer, Ginsberg worked at the Associated Press (AP) from 1986 to 1997. During his initial years at AP, Ginsberg was a member of the team that created the first AP online news site The Wire. At the AP, he worked with newsmen, news editors, and producers.

Ginsberg earned a Bachelor of Arts in political science, history, and Russian from the University of Wisconsin-Madison.

David A. Dzombak, Ph.D., P.E., DEE, NAE
Faculty Director, Steinbrenner Institute for Environmental Education and Research, Carnegie Mellon University

Dr. David D. Dzombak is the Walter J. Blenko Senior Professor of Environmental Engineering in the department of civil and environmental engineering at Carnegie Mellon University. The emphasis of his research and teaching is on water quality engineering and environmental remediation. Dzombak is also associate dean for graduate and faculty affairs for the College of Engineering and faculty director of the Steinbrenner Institute for Environmental Education and Research.

Dzombak has published numerous articles in leading environmental engineering and science journals; book chapters; articles for the popular press; and several books. He also has a wide range of consulting experience.

His current professional service activity includes membership on the environmental engineering committee of the EPA Science Advisory Board (2001-present), the EPA National Advisory Council for Environmental Policy and Technology, Environmental Technology Subcommittee (2004-present), the National Research Council, and is an associate editor of Environmental Science & Technology (2005-present).

Dzombak was elected to the National Academy of Engineering in 2008. Other awards include election as a Fellow of the American Society of Civil Engineers (2002), the Excellence in Review Award from Environmental Science and Technology (2003), Professional Research Award from the Pennsylvania Water Environment Association (2002), Jack Edward McKee Medal from the Water Environment Federation (2000), and Aldo Leopold Leadership Program Fellowship from the David and Lucile Packard Foundation (2000).

Dzombak earned a Bachelor of Science in civil engineering from Carnegie Mellon University, a Master of Science in civil-environmental engineering, and a Doctorate of Philosophy in civil-environmental engineering from the Massachusetts Institute of Technology. In addition, he earned a Bachelor of Arts in mathematics from Saint Vincent College in Latrobe, Pennsylvania.

He is a registered professional engineer in Pennsylvania, a diplomate of the American Academy of Environmental Engineers, and a member of the National Academy of Engineering.

Andy Van Kleunen
Executive Director, The Workforce Alliance

Andy Van Kleunen is the founding executive director of The Workforce Alliance, a national coalition advocating for public policies that fully invest in the skills of all of America’s workers—
including those who are low-income, unemployed, or otherwise seeking advancement—so they can better support their families, and help American businesses better compete in today’s global economy. The Alliance’s national network draws from a diverse range of stakeholders, including business leaders, community-based organizations, colleges, unions, and state and local public officials throughout the United States.

Prior to founding the Alliance, Van Kleunen was director of workforce policy for the national Paraprosfessional Healthcare Institute, where he worked with industry leaders and advocates from across the country to improve job quality and training for low-wage workers within the nation’s long-term care sector. Van Kleunen also spent over 11 years organizing development efforts within several of New York City’s low-income and working-class neighborhoods.

Van Kleunen is the author of several publications in the areas of workforce policy, healthcare policy, and urban community development.

He holds a bachelor’s degree in political science and honors studies from Villanova University and a master’s degree in urban sociology from the Graduate Faculty at the New School for Social Research.

He is based in both Philadelphia and Washington, DC.

Sandi Vito
Acting Secretary, Pennsylvania Department of Labor and Industry

Sandi Vito was appointed by Gov. Edward G. Rendell as acting secretary of the Department of Labor and Industry on Feb. 4, 2008. As acting secretary, Vito heads the fifth-largest agency of Pennsylvania state government, overseeing more than 6,000 employees in 200 offices statewide that serve the worker and business interests of the Commonwealth. Through the administration of programs such as workers’ compensation, unemployment compensation, job retraining and vocational rehabilitation, and numerous enforcement and regulatory responsibilities, the Department directly affects the daily lives of millions of workers, and the more than 250,000 employers in Pennsylvania.

Prior to her appointment Vito, served as the deputy secretary for workforce development where she helped to devise “Job Ready PA,” which greatly boosted Rendell’s economic growth strategy by expanding employment and training opportunities in high-skill, high-wage jobs. “Job Ready PA,” a complete overhaul of the commonwealth’s workforce development system, was urgently needed to adapt skill development, training, and business service models to the global marketplace.

Before coming to the Department of Labor and Industry, Vito served as chief of staff to State Sen. Christine Tartaglione and was the Pennsylvania Democratic Party political director. She also contributed to formulating public policy and advocating for a variety of policy initiatives for non-profit organizations.

Vito holds a bachelor’s degree in economics from Stockton State University and studied community and regional planning and urban studies at Temple University.

James Whaley
President, Siemens Foundation

James E. Whaley was appointed President of the Siemens Foundation in June 2006. He has overseen the Foundation’s management since joining as Vice President in October 2004. In addition to his work with the Foundation, Mr. Whaley also serves as the Senior Director of Corporate Affairs for Siemens Corporation.

Under Mr. Whaley’s tenure as President, the Foundation developed The Siemens We Can Change The World Challenge in partnership with The Discovery Channel and the National Science Teacher Association, this innovative program will focus on educating and engaging students, teachers and communities across the nation in exploring solutions for a more “green” environment built on sustainability practices. The Foundation also expanded its Siemens Awards for Advanced Placement program to all fifty states, recognizing students, teachers and schools for exceptional achievement in AP math and science courses nationally. It launched the Siemens Teacher Scholarship which awards college scholarships to encourage minority students at Historically Black Colleges and Universities to pursue teaching careers in science and math. Mr. Whaley also initiated Siemens Science Day, a national program created to captivate young students’ interest in math, science and technology.

Previously Mr. Whaley served as Director of Communications at the United States Military Academy at West Point. In that position, he executed an innovative communications plan in celebration of West Point’s 200th anniversary. This plan resulted in 24 books, eight network television documentaries, and won the 2003 Public Relations Society of America Award of Excellence and the 2003 PR Week Public Campaign of the Year.

Mr. Whaley has more than 20 years of management experience that includes integrated marketing, strategic communications, media relations, internal communications, crisis communications, and community relations. He is a graduate of Lock Haven University where he received his undergraduate degree in journalism in 1984. He completed his MBA at Embry Riddle Aeronautical University, Frankfurt, Germany, in 1989. Mr. Whaley also attended the Defense Information School, Meade, MD, 1998 and completed the U.S. Army Helicopter Instructor Pilot Course at Fort Rucker, AL in 1990. Mr. Whaley retired after 20 years in the U.S. Army where he received the Legion of Merit, Meritorious Service Medal, Humanitarian Service Medal, Master Aviator Badge and numerous other awards during his career. He serves on the Board of Directors of American Heart Association.
Thurgood Marshall College Fund, and the U.S. Chamber of Commerce Institute for a Competitive Workforce.

Summary 3
Opportunity Cost: Undocumented Students, In-State Tuition, and Financial Aid

Angelo I. Amador (Moderator)
Director of Immigration Policy, U.S. Chamber of Commerce

Angelo I. Amador is director of immigration policy for the U.S. Chamber of Commerce.

As director of immigration policy, Amador is responsible for working with members of the business community to develop the Chamber’s position on comprehensive immigration reform, legalization issues, border security concerns, visa-processing issues, and guest worker programs. He also advocates on behalf of the Chamber and its members before the U.S. Congress and various administrative agencies, including the U.S. Department of Homeland Security, Department of State, and Department of Labor. Amador also chairs the Americans for Better Borders (ABB) coalition, which unites regional business organizations, companies, and trade associations, in manufacturing, hospitality, tourism, transportation, recreation, and other industry sectors. The coalition works to ensure the efficient flow of goods and people across our borders while addressing national security concerns.

Prior to coming to the U.S. Chamber, Amador was in private practice. He also served as law clerk to The Honorable David T. Stitt, judge of the 19th Judicial Circuit of Virginia.

Prior to his clerkship with Judge Stitt, he had worked in Washington, DC for the office of the Governor of Puerto Rico as assistant director and legislative counsel in the Intergovernmental Affairs Division, and as staff attorney in the Mexican American Legal Defense and Educational Fund.

Amador is a graduate of the Robert H. Smith School of Business at the University of Maryland and earned a Master of Arts in international transactions from George Mason University in Arlington, Virginia. He graduated cum laude with a Juris Doctor at George Mason University School of Law and earned a Master of Laws with distinction in international and comparative law from the Georgetown University Law Center where he received the Thomas Bradbury Chetwood Award for graduating with the highest academic ranking in his program.

Amador is an adjunct professor of law at the George Mason University School of Law. He also serves on the faculty of the Virginia Beach Law Enforcement Training Academy.

He is fluent in German, Spanish, English, and Portuguese and is a member of both the Virginia State Bar and the District of Columbia Bar.

Eduardo J. Martí, Ph.D.
President, Queensborough Community College

Eduardo J. Martí was appointed president of Queensborough Community College on July 1, 2000. An experienced educator who has led several community colleges with distinction for more than 25 years, Martí previously served for six years as president of Corning Community College of the State University of New York (SUNY), and for eight years prior as president of SUNY’s Tompkins Cortland Community College. Martí also served as executive dean of Tunxis Community College and acting president of Middlesex Community College, both located in Connecticut.

An advocate for community college education, high standards, and traditional values of education, Martí serves on several boards, including Teachers College at Columbia University, the Community College Research Center advisory board of Columbia University, the Excelsior College Board, the board of governors of the Council for Aid to Education, the College Board’s Commission on Community Colleges, and the California Community College Collaborative at the University of California, Riverside.

Martí has served as past president of the Association of Presidents of Public Community Colleges of the State of New York, member of the executive committee of the American Association of Community College President’s Academy, and member of the Commission on Secondary Education of the Middle States Association.

In May 2007, he was appointed by Gov. Eliot Spitzer to the New York State Commission on Higher Education. In that capacity, he chairs the Workforce & Economic Development Committee.

Martí holds a Bachelor of Arts, Master of Science, and Doctorate of Philosophy degrees in biology from New York University. He is the recipient of the Founders Day Award from New York University and was chosen as the recipient of the New York University Alumni Association’s Distinguished Alumnus Award in November 2007.

David Shreve
Federal Affairs Counsel, Education Committee, National Conference of State Legislatures

David L. Shreve has served as staff director for National Conference of State Legislatures’s (NCSL’s) Education Committee since 1997. This policy committee of state legislators establishes NCSL’s positions on federal legislation. His major areas of focus are elementary and secondary education, special education, school finance, and governance policy. Shreve has been with NCSL since 1987, initially performing research on employment and training issues and then directing NCSL’s Japan Legislative Exchange Program.
Shreve earned a Bachelor of Arts, with high honors, from the University of Maryland in 1974.

Subsequent to graduation, he apprenticed as a carpenter and cabinetmaker; worked as a construction trades teacher in a residential treatment facility for socially maladjusted, learning disabled, and court-referred young men; and served as national manager of construction trades training for the National Association of Home Builders.

Peter A. Zamora
Regional Counsel, Mexican American Legal Defense and Educational Fund (MALDEF)

As the Washington, D.C. Regional Counsel of the Mexican American Legal Defense and Educational Fund (MALDEF), Peter Zamora develops and manages federal legislative strategies regarding education law and policy, voting rights, immigration, and other Latino policy priorities. He has testified before Congress and the U.S. Commission on Civil Rights regarding Latino civil rights issues.

Prior to joining MALDEF, Mr. Zamora served as a bilingual-credentialed English teacher in California public schools, a legal consultant to the District of Columbia Public Schools, and an attorney in a private federal education law practice.

Mr. Zamora has earned a Bachelor of Arts from the University of California at Berkeley, a teaching credential from the University of San Francisco, and a Juris Doctor from the Georgetown University Law Center.

Summary 4
Retooling the Teacher Contract

Frederick M. Hess (Moderator)
Resident Scholar and Director of Education Policy, American Enterprise Institute

Frederick M. Hess is a resident scholar and director of education policy studies at the American Enterprise Institute and executive editor of Education Next. Hess is a nationally recognized authority on education reform and a frequent speaker and commentator on educational issues including choice, accountability, entrepreneurship, philanthropy, collective bargaining, leadership, federal policy, and teacher quality.


Hess currently serves on the review board for the Broad Prize in Urban Education, the board of directors of StandardsWork, the advisory board for the National Council on Teacher Quality, and the research advisory board for the National Center on Educational Accountability.

He is a former high school social studies teacher, a former professor of education and government at the University of Virginia, and has taught as a visiting scholar at Georgetown University, Harvard University, and the University of Pennsylvania.

Hess holds a Master of Education in teaching and curriculum, a Master of Arts, and a Doctorate of Philosophy in government from Harvard University.

Nelson Smith
President, National Alliance for Public Charter Schools

Nelson Smith became the first President of the National Alliance for Public Charter Schools in December 2004. The Alliance is the national nonprofit that works to increase the growth and quality of charter schools through advocacy, communications, and capacity building initiatives.

Previously, Smith served as vice president for policy and governance at New American Schools; was the first executive director of the District of Columbia Public Charter School Board; and was vice president for Education and Workforce Development at the New York City Partnership. From 1985 to 1992, at the U.S. Department of Education, he oversaw numerous programs devoted to improving education through research-based methods.

He has written extensively on the impact of the No Child Left Behind Act on the charter sector. Smith authored studies of the charter school movements in California and Texas for the Progressive Policy Institute, and wrote The New Central Office, an exploration of how central-office functions change as public school districts move toward charter-based systems, for the Education Commission of the States. His articles about charter schooling and education policy have appeared in the Wall Street Journal, Education Next and other publications.

A 1972 graduate of Georgetown University's School of Foreign Service, Smith is a resident of the District of Columbia, where he is active in civic and arts organizations.

He is a member of the board of trustees for the E. L. Haynes Public Charter School.
Executive Director, National Education Association

John I. Wilson, a long-time special education teacher and Association leader, became executive director of the National Education Association on November 1, 2000. The nation’s largest teachers union, NEA also represents education support professionals, higher education faculty, school administrators, retired educators, and education students who plan to become teachers. In all, NEA has 3.2 million members, a staff of 555, and an annual budget exceeding $300 million.

Since coming to NEA, Wilson has championed a minimum salary of $40,000 for every teacher and a living wage for Education Support Professionals (ESP). He also launched an NEA initiative to engage the best teachers in sharing ideas on staffing high-poverty, low achieving schools with the most accomplished teachers.

Wilson has chaired the Partnership for 21st Century Skills, a coalition of 33 businesses and education groups that advocates for every child in America to graduate from high school with 21st century skills. The 3E Institute presented him with the Educator 500 President's Award in 2006 for being “a true entrepreneurial educator.” Wilson currently chairs the Learning First Alliance, a partnership of 18 leading education organizations with more than 10 million members dedicated to improving student learning in America's public schools.

Prior to assuming the highest staff position at NEA headquarters, Wilson served the Association as president and executive director of the North Carolina Association of Educators (NCAE). With Wilson at the helm of this NEA state affiliate, NCAE strengthened teacher training systems, professional development programs, teacher compensation, and teacher recruitment. His accomplishments include the development of new support systems for teachers pursuing certification by the National Board for Professional Teaching Standards. As a result, today North Carolina has more National Board-certified teachers and candidates than any other state. In addition, Wilson led a successful campaign that raised North Carolina teacher salaries from 43rd to 23rd in the nation, and he helped establish the North Carolina Teacher Academy, a state-funded program that provides high-quality teacher professional development.

Wilson has been an NEA activist since his days at Western Carolina University, where he served as president of the NEA student chapter. As a middle school teacher of special needs students, Wilson was an active Association leader throughout his 20-year teaching career. He served as president of the Raleigh Association of Classroom Teachers and the Wake County Association of Classroom Teachers, and also served on the NEA Board of Directors and the NEA Executive Committee.

A true North Carolinian, Wilson was born in Burlington, North Carolina. He graduated with a bachelor of science degree in education and received a master’s degree in education from the University of North Carolina.

Summary 5
Communicating the Competitiveness Agenda

Terrence McNally
Strategic Communications Consultant

As a consultant, speaker, writer, and coach for foundations, public interest groups, public agencies, and progressive corporations, Terrence McNally focuses on message and media mastery.

A graduate of Harvard, where he won its highest academic award, McNally left teaching after a few years, and moved to entertainment in order to reach larger audiences. After 20 years as an actor in TV and film, record producer, music video director, and screenwriter (Earth Girls Are Easy—starring Geena Davis, Jeff Goldblum, Jim Carrey and Damon Wayans—now being developed as a Broadway musical), he realized he wasn’t fulfilling his vision.

He now hosts a radio interview program in Los Angeles (streaming globally at kpfk.org) envisioning “a world that just might work.” Guests have included Norman Lear, Ken Burns, Deborah Tannen, Jared Diamond, Robert Reich, Andrew Weil, Paul Krugman, and Doris Kearns Goodwin. His interviews appear in print at AlterNet.org and as audio files at temcnally.livedigital.com.

McNally is a co-author of Kava: Nature's Answer to Stress, Anxiety, and Insomnia together with Hyla Cass, M.D. McNally brings his wealth of experience in multiple roles and forms of media to help clients clarify and communicate their messages in order to maximize their impact.

Summary 6
Presidential Candidates’ Education and Training Platforms

Arthur J. Rothkopf (Moderator)
Senior Vice President, U.S. Chamber of Commerce

Arthur J. Rothkopf serves as senior vice president and counselor to the president of the U.S. Chamber. His responsibilities include leadership of the Chamber’s Education and Workforce initiative, including the nonprofit Institute for a Competitive Workforce. In addition, he is responsible for supervising the National Chamber Foundation, a nonprofit public policy think tank affiliated with the Chamber. He also supervises the Business Civic Leadership Center, a nonprofit affiliate of the Chamber dedicated to improved business and society relations.

Prior to joining the Chamber in July 2005, Rothkopf served for 12 years as president of Lafayette College, Easton, Pennsylvania, a highly selective undergraduate college of liberal arts and engineering. Before becoming Lafayette president in July 1993,
he was deputy secretary of the Department of Transportation (DOT). He was appointed to this position by President George H.W. Bush and confirmed by the Senate. Before that, he served as general counsel of the department, also a Senate-confirmed position.

Prior to joining DOT, Rothkopf was a senior partner in the Washington law firm of Hogan & Hartson, specializing in tax, regulatory, and legislative representation of U.S. and foreign clients. He was director of the firm’s international operations. He began his career as a lawyer for the Treasury Department and the Securities & Exchange Commission.

Rothkopf earned his B.A. from Lafayette and his law degree from Harvard.

Rothkopf is currently a trustee of American University and president of the Pennsylvania Society. He served as a member of the Commission on the Future of Higher Education established by Secretary of Education Margaret Spellings. He is past board chair of the Council for Higher Education Accreditation and the Association of Independent Colleges and Universities of Pennsylvania. Rothkopf was a trustee of the Smithsonian Museum of American History, the Lehigh Valley Hospital, and the Lehigh-Northampton Airport Authority.

Lisa Graham Keegan
Senior Education Policy Advisor, McCain – Palin 2008 Campaign; Former Arizona Superintendent of Public Instruction

Lisa Graham Keegan is a national leader in the area of education reform and accountability. Lisa is the education adviser for Senator John McCain’s 2008 presidential campaign and former Arizona Superintendent of Public Instruction. She advocates that increased academic performance must be central in all education reform measures.

Keegan has advanced academic standards and accountability, and fought successfully for the implementation of Arizona’s landmark charter school and tuition tax credit laws. She also led efforts to revise the state’s school finance formulas to reflect a commitment to equal access—a job she considers unfinished.

Prior to her current position, she has served as the chief executive officer of the Education Leaders Council. According to National Review, she “created the most effective charter school program in the country.”

Jon Schnur
Education Advisor, Obama – Biden 2008 Campaign; Founder and CEO, New Leaders for New Schools

Jon Schnur is a leading education policy expert and social entrepreneur who consults with policymakers and educational organizations. He has served as an education advisor to Barack Obama since he became U.S. senator. Previously Schnur served as special assistant to U.S. Secretary of Education Richard Riley, as White House associate director for educational policy to President Clinton, and as senior advisor on education to Vice President Gore. Schnur has developed national educational policies on teacher and principal quality, after-school programs, district reform, charter schools, and preschools.

Schnur also serves as a member of the education advisory group for the Clinton Global Initiative.

While he is here today in a personal capacity, Schnur is also the chief executive officer and co-founder of New Leaders for New Schools.