

## Final Report: Mid-Year Check-In with the Koson CIO

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**Date:** Jan 18, 2024

**Related resources:**

- [W](#) CIO Mid Year Reflection 20240102.docx .
- [☰](#) Guidance/Process\_Mid-year Check-in with the Koson CIO

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**Overview:** On January 9th, 2024, members of the Koson Board of Directors and CIO Matt Cartier met in an executive session to discuss the progress Matt is making in his priority goals for 2023-2024. During that meeting, Erin Quigley recorded the feedback (linked [here](#)). After the meeting, Erin was responsible for summarizing the feedback and debriefing it with Matt and the CIO Support and Evaluation Committee at the Jan 18, 2024 meeting. That feedback is summarized below and organized by the 3 strategic priorities.

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### Board Feedback

**Executive Summary:** The reader will note we have observed strong evidence that Matt is making great progress on his strategic goals for the 2023-2024 school year. We appreciate how well he addressed these against the backdrop of a charter renewal, unexpected personnel changes, and other “curve balls” that could have derailed the progress we hoped he would make.

The advice we include here is in the spirit of ongoing collaboration, STEM’s strategic improvement, and Matt’s professional growth. We believe he is doing an outstanding job leading STEM, and we look forward to continuing to support Matt’s work for the long-term.

#### Priority 1: Modeling

*Goal: The CIO consistently models the ownership, teamwork, innovation, and overall commitment to excellence we are driving toward our long-term goal.*

**Board’s Commendations:**

The Board recognized the presence Matt has had as the face of the school. In addition to this, it’s clear Matt has a deep commitment to owning the work and understanding all its facets. He has demonstrated he listens to feedback and “seeks to understand” before jumping into action. These qualities have led folks to act responsively instead of reactively, even during stressful events.

Speaking of staying responsive, we want to acknowledge how well we felt Matt handled a difficult

situation with a parent. He was responsive and proactive and, when necessary, direct with stakeholders about how things needed to change.

We also noted how Matt's demeanor and approach has been authentic, positive, and team-focused, which is what the STEM community needs at this point in his tenure.

**Board's Advice:**

We shared an opportunity for Matt to bring folks (especially other leaders) along in his thinking by sharing his thinking as he's making important decisions. By doing this, Matt can teach his leaders how they might think through difficult decisions. This can help build capacity in them.

We also discussed how Matt might give face time to the STEM community a few times a year so he can share a high-level update on the school's progress and generate excitement for the work ahead. This can serve as a model of how other leaders in the school might present information so it provides clarity and motivates the community. We noted that this is of special interest to parents on the board because sometimes feel they aren't hearing the rationale for certain major decisions, like Standards Based Grading.

## Priority 2: Strategic Planning and Budgeting

*Goal: The CIO initiates and executes a campus-wide strategic thinking and budgeting process to drive the school's priorities.*

**Board's Commendations:**

We are impressed that Matt decided to make a strategic focus on leadership development at STEM. Given the number of priorities, it makes sense to put his efforts into the people who will execute the strategic plan.

Matt shared that he has integrated shorter cycles of strategic thinking/planning. We believe this reflects good judgment on his part because it allows him to provide more oversight on progress and pivot more quickly once he has new information.

**Board's Advice:**

We shared it would be helpful for the board to hear, each month, what progress Matt and STEM leadership are making in their strategic plan (once it's completed with the support of Bellwether). Where are we on track? Off track? Matt asked if we could discuss this during the June/July retreat so we could align on what would be most useful for the board to review each month. We agreed that this makes sense.

## Priority 3: Leadership Development

*Goal: The CIO effectively develops the Shared Services Team by (re)defining roles and expectations, providing regular feedback on performance, and setting up structures for productive collaboration with each other, STEM HR, and future schools.*

**Board's Commendations:**

Feedback is critical to development. Before Matt joined STEM, leadership shared with the Board that they wanted more feedback on their progress so they could develop their skills (the CEO at the time was not

providing adequate feedback). Since Matt joined, we have observed leadership receiving much more feedback and we have heard that they are prioritizing their work more strategically because of it. We commend Matt for implementing new systems for feedback that accelerate the development of our leaders.

At the very beginning of his tenure, Matt needed to make difficult personnel decisions that could have, if not handled well, harmed the culture of STEM. Matt consulted stakeholders and experts to ensure he considered all available information before making a decision. He also engaged board members during the process so they stayed abreast of the situation. Because of this, the change in leadership did not derail STEM's progress and more aligned leadership is now in place.

Matt chose to hold the role of operations and HR until he found the best possible candidates to fill those roles. While this stretched his capacity, we believe his patience and efforts paid off. Both of these new employees bring deep expertise and experience to the work and have already jumped in with both feet.

**Board's Advice:**

Now that Matt has about 6 months under his belt, we shared it is a good time to be more direct with stakeholders (especially leadership) about what he thinks is the best decision. We acknowledge that this shouldn't be done in a way that takes power from his leaders, but we do think it's helpful for them to know where Matt stands on topics that impact STEM's entire education program (ex: Standards-Based Grading). Similarly, we look forward to a more precise description of Matt's dreams for STEM (but only when he believes they're ready to share).

