



Education Policy Fellowship Program

**The Education Policy Fellowship
Program at IEL:**

**Fifty Years of Growing Policy-Savvy
Leaders—and More to Come**



1964 – 2014

April 29, 2014

Friends,

I am both honored and humbled to be presiding over the Institute for Educational Leadership on the occasion of its 50th anniversary—a significant milestone for sure, but more so for a small, not-for-profit organization like IEL.

What began as a small leadership initiative, focused first on the next generation of leaders and, later, on those already in leadership positions, morphed into IEL the organization. Much has changed over the ensuing fifty years, including IEL. While developing and supporting new and established leaders remains a pillar of our work, the IEL of today has a much broader and deeper agenda. IEL now addresses other crucial pillars of success required for young people and their communities to succeed, including building connections between community and public education to support the learning and development of all young people, and developing more effective pathways into the workforce to support youth's transition to adulthood.

This publication, “The Education Policy Fellowship Program at IEL: Fifty Years of Growing Policy-Savvy Leaders – And More to Come,” tells IEL's story through the lens of our very first program. It identifies the brain trust that created IEL, offers a brief tour through the changing decades in America, 1964 to 2014, and describes how IEL's Education Policy Fellowship Program has maintained its focus and continuity. IEL is grateful to the people and organizations who currently run EPFP, as well as the more than 260 former directors and coordinators, who have brought EPFP to life over the years.

IEL's longevity—and the sustainability of EPFP—is a testament to the people who created and nurtured it. While they are too numerous to mention, my predecessors as Presidents of IEL must be singled out: Samuel Halperin, IEL's leader from 1974–1981 who established IEL with his stamp of excellence, and Michael Usdan and Betty Hale, who ably followed in his footsteps.

My colleagues on the IEL leadership team, Curtis Richards and S. Kwesi Rollins, deserve considerable praise for building the 21st century IEL. Finally thanks go to Anne Lewis for helping write this paper, and to Stefani Wilcox and Eric Cline for shepherding it through the production process.

I hope the story of IEL and the Education Policy Fellowship Program will prompt you to work with us to lead across boundaries – to forge alliances and partnerships designed to ensure education equity and excellence and improved outcomes for young people and families. Together, we can be a catalytic force for building learning and action networks that will enable leaders to face significant challenges of today and those yet to come.



Martin J. Blank
President

The Education Policy Fellowship Program at IEL: Fifty Years of Growing Policy-Savvy Leaders—and More to Come

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Education Policy Fellowship Program



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The Education Policy Fellowship Program at IEL:

Fifty Years of Growing Policy-Savvy Leaders—and More to Come

The Institute for Educational Leadership's Education Policy Fellowship Program (EPFP) has survived in the maelstrom of education policymaking since 1964 and has a story to tell. Without a membership base, deep pockets or a zealous ideology, IEL/EPFP reaches its 50th anniversary as a viable and unique influence whose story plays out a thousand-fold in the professional lives of the 8,000 people who have been Fellows. Other well-intended national programs have come and gone, but EPFP endures as a flagship program of IEL and contributes to the policy landscape for very good, strategic reasons.

Because EPFP singularly invests in leadership, its successes play out in people – individuals who spend a year as Fellows, studying, evaluating, and learning about education policymaking at various levels and in different settings. Research and anecdotal evidence confirm that the EPFP experience makes a huge contribution to the policymaking field and across policymaking boundaries. The Fellows become informed and skilled leaders; they become part of a network that provides long-term benefits to their career; and their work environments, whether at national, state, district, or community level, are enhanced because they can draw on the knowledge and expertise of the Fellows.

What purpose does EPFP have and why has it endured?

An Unprecedented Call for Action

By 1964 when EPFP began as the Washington Internships in Education (WIE), the relationships among education policymakers at different levels were already entering unknown waters. The National Defense Education Act of 1958 heralded a new interest by the federal government (with funding) in national education outcomes. The social activism of the early 1960s insisted that a better education, for even the poorest children, was a priority and that the federal government needed to actively pursue an equity agenda.

Aware that this new federal role was here to stay, those who watched education policymaking recognized a huge vacuum: educators had little understanding of policymaking and no experience in thinking about a federal role, and federal officials had little understanding of schools and no experience thinking about policies that could make a difference in outcomes. An investment in helping people, as well as creating programs, was needed.

Concurrent with awareness of the need for policymaking skills for educators and for education awareness on the part of policymakers was a Ford Foundation emphasis on investing in potential leaders. Edward J. Meade, Jr., education and public policy manager at the Ford Foundation, believed that developing people's skills was as important, if not more so, than investing in programs. Many initiatives at the Foundation followed this philosophy, so it was a natural fit for the Foundation to look for a way to support potential leaders in education policy.

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"These new conditions required a new generation of educational leadership, men and women who understood the Federal role and who knew how to get things done in the new climate that was being created. What was needed, they concluded, was a new initiative that would train people both inside and outside government to function in a radically changing arena: education policy."—Anonymous WIE Principal, Seeking Common Ground, Unpublished Manuscript, Bruce Boston, 1981
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Elizabeth Hale (far right) moderates a panel on education policy with (left to right) Barbara McCloud, Samuel Halperin, Paula Bagasao, Michael Usdan, and Ben Perez.

In the Beginning

The initial Ford Foundation investment in 1964 established the WIE, placed under the aegis of George Washington University (GWU). This was the start of EPFP. It changed names and structure over five decades, but continues to stick to its purpose: developing policy savvy leaders. Over the years, the program has helped 8,000 educators and professionals in related agencies to become better informed, more adept at collaboration, and savvier about the policy process and actors. The pool of people chosen as Fellows and the policies that get their attention are different, but EPFP remains an impartial opportunity for people to learn about the education policy environment and how to influence and operate effectively in it.

Initially, WIE focused on giving potential policy leaders across the country a one-year experience at the national level to promote an understanding of the national education policy landscape. They served as interns in federal offices or national organizations and were exposed to promising practices around the country. Four years later, another Ford Foundation investment established the Educational Staff Seminar (ESS) to give those already in policy positions in the federal government an opportunity to explore issues and talk

to each other on bipartisan turf. Other ideas for improving the policymaking environment were proposed, all aimed at shaping informed decisions as the federal role expanded rapidly (the 1965 Elementary and Secondary Education Act created an explosion of policies/programs). These discussions led to a decision to support an umbrella organization to cover the programs already established and any future projects. Consequently, the Ford Foundation gave GWU a grant to launch IEL. The GWU link ended when IEL became an independent, nonprofit organization in 1981.

An impressive leadership group produced the thinking that led to the creation of IEL and to the continuation of

EPFP. It was composed of people immersed in national education policy, including university education deans (Francis Keppel, Harvard); U.S. Commissioners of Education (Harold “Doc” Howe and Keppel); shapers of federal education policy (Sam Halperin); and prominent researchers (Stephen Bailey and Lawrence Cremin); Donald P. Mitchell the Director of WIE; and, of course, Ford Foundation officials. Michael Usdan, with experience directing the City University of New York site of a project to recruit non-educators into educational administration, was a consultant, and both he and Halperin later served as presidents of IEL. This close-knit network of experts was eager to help create a home for growing new policy leadership.

As with any developing entity, some of the ideas envisioned for IEL never happened or gave way to competing priorities; other activities, always with the goal of building leadership skills, took their place. The one survivor from the early, formative days is EPFP.

fices/initiatives (the first ESEA included a provision to support state education leadership).

WIE decided its interns also needed experience at the state level and began sending candidates to state education offices and organizations. This prompted an Illinois sponsor to ask why outside interns were being placed when the state had potential leaders it needed to train. The answer to this question was the first step in turning WIE into an in-service program model. Then, the program changed its name to EPFP and the age requirement was dropped. These changes made it possible to recruit more seasoned individuals and reflected the broadened focus on the state role in education, rather than just Washington exposure to policymaking. Over time, EPFP emerged as a collaboration of state-based partners with IEL serving as the national office. One person who has been associated with EPFP since its earliest days commented:

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“WIE was based on the premise that young people (no more than 40) identified as potential leaders in education should have an opportunity to supplement their formal training with ‘hands on’ experience on the firing line of national education policy formulation. . . . Through their work exposure . . . and in meetings with key educational officials, the Interns would have a chance to broaden and deepen their understanding of educational policy making at this new and increasingly important level.”—WIE Principal, Seeking Common Ground, Unpublished Manuscript, Bruce Boston, 1981
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Going to the Action

WIE (or EPFP as it was later called) was just getting its feet wet in the Washington, DC, environment when a flood of federal programs swept across the policy landscape – and the waters muddled. Starting as bi-partisan agreements to improve education through the National Defense Education Act, then the Elementary and Secondary Education Act and other initiatives, the federal presence eventually became a partisan political tool that added, subtracted, or changed the rules on education policies as political control shifted. “Neutral education turf” where future policy leaders could discuss issues and solutions without having to defend political stances was more necessary than ever. Also, somewhere in the policy hierarchy there needed to be people who could see the big picture, go beyond petty protections of turf, and keep the focus on the educational outcomes they and their institutions supported. EPFP provided that space and developed such leaders.

The policies kept coming. Even though the passionate social activism of the 1960s waned, judicial decisions regarding children with disabilities and non-English speaking students added to national policymaking. All of this activity increased the responsibilities of state and district leadership to manage and monitor new of-

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“What we try to do in EPFP is to develop leadership for educational policy in a way that is non-partisan, to help people learn how to work with all kinds of people with different perspectives, and to develop consensus around educational policy...You want to build a culture supporting that...bridging the chasms is what this program is all about.”—Anonymous MI EPFP Staff, EPFP In Action, 2009
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Ohio and Illinois were the first states to have their own WIE/EPFP program. Initially, these sites’ cohorts were a combination of in-service and nationally recruited Fellows. But, by 1982, EPFP was an in-service program model, oriented to recruiting emerging leaders working in state or local organizations that needed leadership and policy support. Over the years, 21 states, as well as the District of Columbia and Puerto Rico, have operated EPFP sites. The current enrollment (2013-14) in 12 states and the District of Columbia is the highest in the program’s history – 260 Fellows. Michigan and Massachusetts have not missed a year since establishing an EPFP site. Although some sites have dropped from the program, other states have been added and some

states have re-launched their programs after building more sustainable institutional partnerships. Currently, IEL is in the process of developing new program sites because of the ongoing, and intensified, need to be able to talk through education policymaking in an informed manner.

EPFP went through more than a change of name and location. Today, Fellows are nominated by agencies/organizations or apply on their own. For the first 25 years of the program the pool of Fellows candidates was vertical, spanning all levels of educational governance, and the program fostered deep connections among them. The second quarter of the century has witnessed the addition of a more horizontal group of participants drawn from many interests within a state such as school boards, unions, state legislatures, parent groups, education foundations, and social support agencies. Throughout its 50-year history, however, EPFP always has been about preparing cross-boundary leaders.

Another deliberate change brought greater diversity to the Fellows program. IEL sought funding to encourage sponsors to find leaders of color and/or women as participants. EPFP became the setting “for women and minorities to gain a place at the table,” according to Elizabeth “Betty” Hale, former president of IEL and former EPFP Director. By 2002, 35 percent of the Fellows were racial/ethnic minorities and 61 percent were female.

How EPFP is Organized

EPFP State Sites

The state site provides the heart of a Fellow’s EPFP experience. Because each state has unique concerns and strategies for developing education policies and varying power structures, EPFP is organized in different ways from state to state.

In a number of states, a statewide, non-profit policy organization leads EPFP. In Pennsylvania, EPFP and The Education Policy and Leadership Center (EPLC) in Harrisburg started in 1999 at the same time and are intertwined in their focus and networking. The program began with 12 Fellows, and in 2013 enrolled its highest number of Fellows ever – 37 – with others on the waiting list. The Fellows are a mix of mid-career leaders, representing the state department of education, legislature, other state agencies, K-12 administrators,

PTA and state education association presidents, school business officials and higher education administrators and educators. The Coordinator, Ron Cowell, started EPLC after retiring as a state legislator and state education committee chair in the Pennsylvania House of Representatives. He has a deep knowledge of the education policymaking issues in the state and has a broad network that enables him to make expertise available to the Fellows.

Similarly, the North Carolina EPFP, in operation since 1979, was based at the North Carolina School Boards Association, with support from the state superintendent’s office; it moved to the think tank, the Public School Forum of North Carolina, twelve years later. The Fellows meet weekly, giving them time to discuss issues deeply with an array of resource people – legislators, journalists, researchers, judges, agency officials, and business and community leaders. As in Pennsylvania, Fellows study major trends and issues, then hone in on the specifics of policymaking in the state.

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“Education policy in North Carolina tends to be random acts of practice with little coherence. EPFP’s role... is to help Fellows understand and realize that such an approach to policy will not yield the desired results. It connects people and helps them to understand how they fit together as part of a larger whole.”—Anonymous NC EPFP Alumnus, EPFP In Action, 2009
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Other non-profit organizations leading state EPFP programs include the Georgia Partnership for Excellence in Education, the Rennie Center (MA), and the Partnership for Children and Youth (CO). Minnesota EPFP is now housed at the Center for Policy Studies in St. Paul; however, it was started at the University of Minnesota during the 1976-77 Fellowship year. It resided there for thirty-five years under the leadership of the late Dr. Van Mueller, former chair of the university’s Department of Educational Policy and Administration, before moving to the Center in 2011. IEL hosts EPFP in Washington DC, drawing Fellows from the city, northern Virginia, and Maryland.

Another key group of lead EPFP organizations are policy centers at universities. After being led for many years by enthusiastic district-level administrators and then a statewide forum supported by the State Department of Education, Michigan EPFP moved to the College of Education and the Education Policy Center at Michigan State University in 1995 (formerly headed by alumni of EPFP). “Because this clearly is a well-respected research university, we can call on expertise across the state, and people value our policy work,” according to Dan Schultz, a coordinator of the Michigan program since 1981—the longest serving EPFP Coordinator. Fellows meet at Michigan State twice a month for presentations “from people with deep understanding of policy development.” The Michigan EPFP was one of the first EPFP sites “to stretch beyond education,” Schultz says, and enroll Fellows from job training, criminal justice, business, museums, foundations, and other areas. The other current EPFP sites led fully or partially by universities include Massachusetts (Northeastern University), Mississippi (Mississippi State University), New York (Teachers College, Columbia University), and Ohio (Cleveland State University).

EPFP lead organizations in other states include Connecticut’s Area Cooperative Educational Services (ACES) and the South Carolina School Improvement Council (SC-SIC). These education service organizations provide support, training and technical assistance to improve educational outcomes. ACES is both a regional service agency and a local education agency working in southern Connecticut, and SC-SIC is the only state-wide organization in the nation working to assist local School Improvement Councils.

EPFP Sites 2013-2014

- ★ **Colorado:** The Partnership for Families and Children
- ★ **Connecticut:** Area Cooperative Educational Services
- ★ **Georgia:** Georgia Partnership for Excellence in Education
- ★ **Massachusetts:** Rennie Center for Education Research & Policy and Northeastern University
- ★ **Michigan:** Education Policy Center, Michigan State University
- ★ **Minnesota:** Center for Policy Studies

- ★ **Mississippi:** John C. Stennis Institute of Government, Mississippi State University
- ★ **New York:** Teachers College, Columbia University; Westchester Putnam School Boards Association; and the Center for Educational Leadership at Putnam/Northern Westchester BOCES
- ★ **North Carolina:** North Carolina Public School Forum
- ★ **Ohio:** Center for Educational Leadership, Cleveland State University
- ★ **Pennsylvania:** The Education Policy and Leadership Center
- ★ **South Carolina:** South Carolina School Improvement Council
- ★ **Washington, DC:** Institute for Educational Leadership

EPFP Site Leaders

Each state site is led by a Coordinator or by a team of Coordinators. They are leaders in education with policy expertise and vast networks and are responsible for guiding the Fellows’ learning and development. Their constant hard work, enthusiasm for developing policy leaders, and dedication make EPFP successful.

Coordinators generally come from the staff of the lead organization or serve as consultants. Together, Coordinators and the lead organizations are responsible for developing a curriculum that focuses on the professional needs and interests of participants, capitalizing on local assets and their own resources and expertise. Coordinators facilitate sessions and help Fellows connect their learning in order to understand the bigger policy picture. They are also responsible for recruiting each year’s incoming class of Fellows. Coordinators and the lead organization reach out to various groups and organizations (teachers unions, associations of school administrators, state departments of education, state and local boards of education, school districts, businesses, corporations, colleges and universities, foundations and nonprofits, and corporations) to build a class that is cross boundary.

All Coordinators are part of the national Coordinators network managed by IEL. The network helps sites exchange best practices, share insights gained from experience, and raise questions and issues of interest to others. Programs at each site are strengthened by com-

munications across the network. An advisory committee of Coordinators drawn from the network works with IEL to inform EPFP’s national strategic plan, address challenges, and provide guidance on site development, the annual Washington Policy Seminar, and network meeting agendas.

Program Design

The actor and entrepreneur, Robert Redford, credits the success of Sundance in producing new voices and new visions (aka new leaders) for the film making world to several organizational principles including: introduce people to as many perspectives as possible; establish a communal table; and promote story telling about what worked or what failed. These same organizing principles are constants across the EPFP sites.

EPFP provides a unique mix of learning formats and opportunities (seminars, site visits, book clubs, electronic discussion groups, etc.). Many sites have an opening retreat to kick off the EPFP experience. For example, during the North Carolina retreat Fellows discuss broad issues such as changes in demographics and key education issues and then spend a day on policy details such as who are the key policy players, the fundamentals of policymaking in the state, the intersection of local-state-federal policies, and the role of research and data. The opening retreat also provides an opportunity for Fellows to spend time getting to know each other, building social capital – that is, developing the personal relationships that are fundamental to the success of the program and that lead to life-long personal and career networks. For the remainder of the Fellowship year, the Fellows meet regularly, usually monthly or semi-monthly, for sessions that focus on particular topics such as school choice or funding.

EPFP has experimented with various ways to organize the Fellowship cohort. Some programs have recruited individuals working in one primary issue area, focusing their Fellowship year on that issue and identifying the leadership needed. The inaugural site in Massachusetts for example, focused on legislation (PL 94-142) supporting the education of students with disabilities, and, at one time, the Colorado site concentrated on higher education.

Today, EPFP strives to recruit a diverse cohort of Fellows, seeking individuals working on the range of is-

ssues and processes that impact student outcomes. Since the mid-1980s, several states (including North Carolina and Connecticut) have supported the participation of their Teacher of the Year as a strategy to develop and support teacher leadership. Occasionally, IEL has received funding to provide scholarships for individuals working on and/or representing a specific group or issue. Such funding has supported Fellows working in gifted and talented education and special education, as well as Latinas/os in higher education and women and minorities in education research. In the mid-1990s, funding from the DeWitt Wallace-Reader’s Digest Fund (later the Wallace Foundation) established the Collaborative Leadership Program (CLP), a targeted effort to recruit and prepare cross-boundary leaders. The program had a statewide focus in Arizona and New Jersey, and a dual city-wide/statewide focus in Chicago, Illinois and in Arlington and Gloucester, Virginia. The most recent IEL scholarship support funded individuals engaged in high school reform.

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“The opportunity to network with top educational professionals across the state is not one to be missed. Having said that, the most valuable benefit to the Fellowship Program is the complete analysis of education in Pennsylvania. Highly qualified panelists present about K-12, higher education, education/community partnerships, and governmental affairs as they pertain to education in Pennsylvania. This is a must for educational and governmental leaders across the state.”—
Higher Education President, PA EPFP
Alumnus 2012–13
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Employer Sponsorship and Program Fees

EPFP is a fee-for-service program in which the tuition is paid by a Fellow’s employing organization; in rare cases, Fellows fund their own participation. Employers also provide Fellows release time for on-site and national activities whether or not they are paying the tuition. The tuition is set each year by the Coordinators and local sponsors.

Several sites have organizations that sponsor one or more Fellow each year. The program also benefits from having EPFP alumni as frequent sponsors of Fellows. These organizations and sponsors have determined that the cost of the program is minimal compared to the value that it adds to their staff and to their organization.

What Does It Mean to Be a Fellow?

An EPFP Coordinator in Illinois, a former college president, described EPFP as “a year of foreign travel while remaining at home and on the job.” This description captures the essence of EPFP: give developing leaders multiple opportunities to broaden their views. EPFP uses this strategy to support the three goals that are consistent across all EPFP sites:

- ✦ develop and strengthen leadership skills,
- ✦ improve and expand Fellows’ understanding of policymaking, and
- ✦ create and sustain networks.

Develop and Strengthen Fellows’ Leadership Skills

Leadership – a key organizational principle of IEL – can seem an amorphous goal except when studied and practiced as a specific skill. The late John Gardner wrote often about leadership – and carried out his values as president of the Carnegie Corporation, as the Secretary of the Department of Health, Education and Welfare (HEW), and as a mentor to many of IEL’s founders. He contended that great leaders need to be developed and to see their leadership as larger than “simply tending the machinery of that part of society to which they belong (T)hey are not pursuing a vision of what the total society needs.”

Some of the EPFP sites specifically teach leadership skills, using individual assessment tools, book discussions (such as Donald T. Phillips’s *Lincoln on Leadership: Executive Strategies for Tough Times*, or EPFP alumnus Richard Elmore’s book *I Used to Think and Now I Think*, or IEL alumnus John Merrow’s book *The Influence of Teachers*), case studies, simulations, and similar teaching and learning strategies. Other sites form ideas of leadership through osmosis, analyzing how presenters came to their decisions and crafted policymaking.

Almost all of the sites feature a collaborative ele-

ment. Michigan EPFP, for example, summarizes learning priorities from the EPFP applications and divides the Fellows into learning teams. The teams take responsibility for presentations in the spring of the Fellowship year. The Pennsylvania Fellows also divide into teams and prepare policy presentations for the whole group and for legislators. Cowell has deliberately included the issue of ethical leadership in the curriculum, saying, “You can’t have any kind of leadership program without an explicit discussion of ethics.”

An urban school district administrator participating in the Michigan EPFP deftly summarized the leadership skills she encountered in the program:

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“I was placed in a room with many people of different belief systems and professions and had to examine a wide variety of ideas... Things that stand out about the EPFP experience include group processes and self-reflection; personality analysis; group problem solving and utilizing everyone’s expertise; the close ties of policy and politics for problem solving.”—School District Administrator, MI EPFP Alumnus
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One of the most unique EPFP activities is the Regional Leadership Forum co-sponsored by EPFP sites in Massachusetts, Michigan, New York, Ohio, Pennsylvania, and Washington, DC. Every October, Fellows from these sites gather in Gettysburg and Carlisle, Pennsylvania. Tours of the Gettysburg Battlefield focus on strategic leadership on the battlefield in July 1863. At the U.S. Army War College in Carlisle, the Fellows learn about the War College’s curriculum for preparing strategic leaders, and about the vision, culture, and ethics of leadership. A prime message from the Army War College presenters is that management creates surface changes while leadership changes the culture. Or, in other words, “culture eats strategy for lunch every time”. EPFP uses its unique partnerships with Gettysburg tour guides and U.S. Army War College leadership to provide training in strategic leadership concepts.

Similarly, Mississippi EPFP offers the Civil Rights Bus Tour which takes participating Fellows from sites



Participants in the 2013 EPFP Civil Rights Bus Tour visit 16th Street Baptist Church in Birmingham, AL, the site of a 1963 bombing that killed four girls.

across the country to visit communities and landmarks important to the Civil Rights movement. From Philadelphia to Meridian, Mississippi, and on to Selma, Montgomery and Birmingham, Alabama, the Fellows stop at museums, memorials, and other sites to learn about the movement and to talk to the people who were directly involved.

Improve and Expand Fellows' Understanding of Policymaking

Every EPFP site immerses participants in policymaking in various ways: by hearing from those who do it every day, by analyzing the process of developing and implementing individual policies and their impact, and by learning more about the effect of policies on sectors other than their own. EPFP's small group setting intensifies the experience for the Fellows. While Fellows may know the policymaker by name or from the media, the policies come alive when they hear firsthand the details of the process and question the individuals responsible for the policies. As one North Carolina Fellow noted, "You get to hear what goes through their head and you begin to understand why they do one thing or another." Hearing from those with hands-on experience enhances the policy discussion.

In North Carolina, one exercise divides the Fel-

lows into groups representing finance committees in the state legislature and special-interest lobbyists. The finance groups have a week to develop a balanced budget while being pressured by lobbyists. All Pennsylvania, Michigan, Massachusetts and Ohio Fellows participate on a team project related to policy and develop a presentation for the Fellows and, in some cases, legislators. New York Fellows learn about the complexity of policymaking by identifying an issue with the implementation of a state or federal policy mandate in their district/agency. Either individually or in small groups, they work throughout the year on the implications of the policy and present recom-

mendations. Topics for these projects have included school safety, arts programs in schools, the economic benefits of community schools, non-academic influences on school behavior, educator preparation and evaluation, college and career success, proficiency gaps, and labor-management issues.

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"Going to (the Army War College) was pretty powerful... a lot of us went in with pre-conceived notions of what they were doing up there, but after a few hours it was clear that the military has done a lot of thinking and work around developing leaders. It really helped us understand what some of the problems were and how it could help us in education."—Anonymous EPFP Alumnus,
National EPFP Evaluation 2012-2013

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“(The EPFP) gave me a clear understanding of the actual process to introduce and change policy. You suspect... that it is very easy to propose and then enact. However, there are so many other factors that come in to play, some of which do not have any direct relation to the policy, that cause delays on the movement of the policy... There is no one right answer.”—Anonymous EPFP Alumnus, National EPFP Evaluation 2012-2013

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Create and Sustain Policy Networks

Each cohort of Fellows in a state becomes an instant network. The groups are small. The ambiance, often over a meal in comfortable surroundings, fosters a different kind of conversation than the Fellows find in their more formal workplaces. EPFP is a safe place to exchange ideas, argue positions, and find common ground with aspiring leaders across boundaries. The networking component is “huge,” according to Monique Felder, a Montgomery County (MD) central office administrator and coordinator of the DC EPFP since 2008. “It provides what employers cannot – an opportunity to get out of your silo and engage with others about how to improve outcomes for children.” For Ron Cowell, coordinator of the PA EPFP, effective policymaking requires effective relationships among those who create policies, so EPFP establishes a norm that crosses political lines and bureaucracies.

By design, EPFP increases the density of work relationships and networks that are vital to the exchange of knowledge, experience, and resources. The varied EPFP venues promote group interaction which, in turn, facilitates the creation of bonding and bridging social capital. The intent is to help Fellows develop and refine their capacities to cross organizations, cultures, sectors and issues, and to become more skillful at building broader networks for individuals and institutions—that larger view articulated by John Gardner.

In addition to developing a network among Fellows, individual Fellows also develop ties to the people who interact with the program—the experts, research-

ers, legislators, and others who spend time talking about policymaking with the Fellows. Coordinators provide Fellows with the tools to contact speakers and encourage them to do so. Anecdotes from Fellows confirm that they believe the policymakers who contribute to the program are accessible and open to providing help and advice. Often, they are alumni of the EPFP.

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“There are some big-time educators who have gone through the program... Just this January I connected with (another alumnus) who is pretty much a junior college honcho for the state... This program is on the top tier of (networks) in the state. I’ve been through superintendent preparation programs, through local networking activities, but for my professional growth, the EPFP people have given me more access to more people.”—Anonymous MS EPFP Alumnus, EPFP In Action, 2009

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Alumni Networks

In the states with ongoing EPFP programs, strong networks of hundreds of educators and leaders in other sectors have been developed, and the Coordinators in those states consider it important to stay in contact. EPFP alumni serve as program resource people, are part of the recruiting effort, and often sponsor Fellows or encourage others in their organizations to provide this professional development opportunity. Many heads of organizations recognize the value of EPFP and annually sponsor a member of their staff to participate. Sites use various communication strategies to keep alumni and sponsors in the loop about EPFP and the recruitment process.

Michigan EPFP sponsors at least one alumni gathering every year, either a day-long conference or a reception, which is planned by former Fellows. Pennsylvania EPFP invites alumni to its annual “hill” day in Harrisburg. Many sites use the annual welcome reception and/or end of year graduation as an opportunity for alumni to reconnect with the EPFP network. Alumni of the North Carolina program are invited to attend the

graduation of Fellows each year at which time they also meet the new Fellowship cohort.

Michigan EPFP was the first to use e-mail as a way to keep alumni connected, and now IEL and each EPFP site maintain an online community for all Fellows (current and alumni), Coordinators, former Coordinators, and IEL staff.

Washington Policy Seminar

The capstone EPFP experience is the Washington Policy Seminar, organized by IEL for current Fellows, but open to alumni who want to enhance their understanding of national policy issues. IEL hosts the current Fellows and coordinators for a three and one-half day exploration of federal education policy and intensive, wide-ranging discussions with policy thinkers/doers and critics and advocates.

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“The simulation in Washington was an ‘eye-opener’...The most significant development was my ability to look at a situation from more than one angle and see that compromise is essential for anything to get done. What seems so simple never is, and that while it is important for policymakers to fight for what they believe in, the result is a stalemate and inaction.”—Anonymous EPFP Alumnus, National EPFP Evaluation 2012-2013
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The agenda does not dance around issues; it is a blatant attempt to broaden participants’ ability to see all sides of policy issues. The seminar opens with a policy overview and then plunges the attendees into an afternoon of simulated Congressional decision-making called Congressional Insight. Led by the EPFP site leaders from the John C. Stennis Institute of Government at Mississippi State University, the simulation uses computer technology to replicate a Congress member’s first term. Teams of Fellows from across the EPFP sites (a first step in developing the network) go through several rounds in which they must decide which bills to support; which committee posts to seek;

how much time to devote to fundraising efforts; and what tradeoffs must be made amidst pressures from constituents, political parties, interest groups, and the media. These decisions must be made under increasingly tight deadlines, and instant feedback shows how the team’s decisions helped—or hurt—their chances for reelection.

For the next two days, the seminar involves Fellows in large and small group discussions that deal with big issues (e.g., partisanship and its impact on policy-making, an analysis of the “Influence Industry,” what to expect from the current Congress, politics and equity) and nitty-gritty issues (e.g., quality teachers and quality leaders, school-family-community connections, early childhood programs, school choice, etc.). WPS speakers come from the U.S. Department of Education, Congress, think tanks, national education associations, and other national organizations focused on policy issues.

Because the Fellows represent cross-boundary responsibilities, the WPS is unique among Washington, DC briefings. It is not tied to an association agenda or to ideological stances. Rather, it carries out the goal of providing an impartial venue for seeing and assessing the big picture, as well as the “sausage-making” details that produce education policy.

IEL as Catalyst and Guide

IEL is the national program office for EPFP, guiding and supporting the program sites in several significant ways. It is the organizational center for the site Coordinators, convening them three times a year and connecting them through monthly conference calls. These meetings and calls go far beyond housekeeping details. They are designed to give the Coordinators background on the policy landscape and access to Washington experts who can comment on current issues.

Initiatives emerging from state EPFP leadership can count on IEL support. IEL is a partner with the Michigan and New York EPFP sites in what is now a three year old endeavor – the Global Education Policy Fellowship Program (GEPFP). This program enrolls EPFP alumni and other experienced education policy leaders in a study of education in other countries. The GEPFP Senior Fellows participate monthly in a series of two-hour Web-based seminars focused on global policy issues. The nine-month program includes one

overseas study tour (China was the first and second site; the 2013-14 Senior Fellows visited the United Kingdom).

IEL provides research and vision-setting that influence what happens in EPFP initiatives. For example, it gathered a group of “thinkers,” as it celebrated its 25th anniversary, to map future directions. Out of that came a focused effort to include more minorities and women in IEL’s work, involve the business community in leadership, and take advantage of new communications media. All of these themes resonate today in the EPFP sites. IEL has long promoted community schools and community involvement and is a prime national leader in keeping communities involved in public schools. This emphasis rubs off on EPFP agendas and complements the inclusion of Fellows from across the spectrum of interests where policy affects the well-being of children and young people.

Much of the IEL support now comes through the use of technology. In addition to having national contacts and a place to post resumes, initiate blogs, and upload photographs, IEL’s website provides Fellows with space on the online community through a private website for their state. IEL also uses web conferencing for groups of Fellows, allowing them to see a presentation, view documents on a shared screen, and discuss the topic with each other, in real time.

IEL provides information, resources and contacts on cross-boundary leadership not only through the EPFP website but also with a resource newsletter, LeaderShipShape. The resources are geared to the three themes of the program – leadership skills, understanding the policy process, and networking. These resources are available to the over 8,000 Fellows and former Fellows in the IEL database. IEL uses other forms of social media – it maintains a LinkedIn group exclusively for the EPFP network and a Twitter account to share network information and news.

What Are the Results?

Since the impact of an experience such as EPFP is so personal, it is difficult to quantify the results. Positive anecdotal evidence from individuals abounds, but IEL also has tried to capture the importance of EPFP through research studies. The most far-reaching effort was a study and analysis of EPFP as a cross-bound-

ary laboratory addressing the question: How do we get the leaders we need in education? With funding from Lumina Foundation, researchers from the University of Minnesota, led by noted education researcher, Karen Seashore Lewis, conducted a survey of Fellows, a search of the literature, focus groups and interviews to produce a four-part series of reports published in 2009 that included a review of the literature, findings from a survey of WIE/EPFP Alumni, comprehensive case studies of four of the EPFP sites, and a guide to the development of cross-boundary leadership development programs.

The researchers concluded that EPFP could answer the question with gusto: you get the leaders you need by carefully developing them. The study found that the EPFP experience benefitted the individuals and their sponsoring organizations in multiple ways by

- ✦ increasing Fellows’ knowledge base and refining their leadership skills;
- ✦ strengthening Fellows’ ties both within and outside the EPFP group;
- ✦ creating an enduring impact on Fellow’s work efficacy and careers by developing their human capital and creating social capital;
- ✦ enhancing employees’ ability to make research-based contributions to policy and practice;
- ✦ expanding the use of professional networks for gaining access to people and resources previously unknown or unavailable to an organization; and
- ✦ developing over time a larger, savvier systemic leadership capacity in a state.

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“(The positives included) meeting new people and hearing from a varied group of speakers who ALL brought valuable information to the table... Overall, the experience was very positive as it regularly made me rethink many positions I had prior to the session.”—Anonymous EPFP Alumnus, National EPFP Evaluation 2012-2013
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The EPFP study and interviews with coordinators underscore the importance of EPFP to career opportunities. For the most part, Fellows are mid-career educators or organizational administrators “who really get propelled forward,” commented Monique Felder, coordinator of the DC program. “I’ve seen them run for school boards, start charter schools, become principals, generally just take on a lot more responsibility.” The torch is passed down. Alumni of the program who receive promotions not only become resources for succeeding Fellowship cohorts, they also are active in nominating people from their agency/organization to be future Fellows.

This personal benefit is confirmed by the most recent national evaluation of the 2012-13 EPFP cohort by Education Research Institute, Inc. (ERI). Ninety-seven percent of those surveyed agreed that they had opportunities to increase their knowledge of current and emerging education policy issues; 92% agreed that they had opportunities to explore the connections between leadership and policy; 94% said they had gained a better understanding of how policy is made and who influences it; and 96% said they developed professional relationships that would not have been possible otherwise.

As emphasized in the curriculum provided by the Army War College, many EPFP participants describe how their own “culture” changed because of their EPFP experience. Typical is this comment cited in the recent ERI report:

Looking Ahead

EPFP enters its next half-century at a time of crisis. Education is more politicized than ever. Competing philosophies, as well as political parties, speak past each other. The “neutral ground” offered by EPFP and IEL is sorely needed at the federal as well as state and local levels, as are policy leaders who understand the art of compromise and the need to develop cross-boundary professional relationships.

Equally important, our leaders must know how to listen and gather people behind a powerful vision, know how to move ideas and get results, and recognize the extraordinary demographic shifts that continue to change America’s public schools and make the success of public education more important than ever. This, too,

is the work of EPFP and IEL.

EPFP has succeeded by providing a strong curriculum on leadership, plenty of ways to learn about policymaking and networking that follows Fellows throughout their careers. The EPFP sites with longevity have two strengths: institutional support and well-connected leaders thoroughly familiar with policymaking in their states. Even when the Coordinators change, the continued support of state-based sponsoring organizations and higher education institutions helps maintain the programs.

IEL will continue to work to support EPFP sites and to expand EPFP to more states. We know from our conversations with policymakers and practitioners that there is a great need for spaces where people in different roles, in different organizations, and of different persuasions can explore challenging education issues together. We also know that individuals “in the trenches” need opportunities to develop their leadership capacities. We believe EPFP is the vehicle to meet that need.

The designers of EPFP believed in a robust public education system – one that prepares young people not only for college and career but for a role as contributing members of our great democracy. For the next fifty years, developing leaders who can contribute to this everlasting purpose will remain the focus of EPFP and at the heart of the work of the Institute for Educational Leadership.



2013–2014 EPFP Sites

Lead Organizations & Coordinators

Colorado EPFP

The Partnership for Families and Children
www.pffac.org

Peter Huidekoper
 Coordinator Colorado EPFP

Connecticut EPFP

Area Cooperative Educational Services
www.aces.org

Leslie Abbatiello
 Director, Professional Development & School Improvement

Georgia EPFP

The Georgia Partnership for Excellence in Education
www.gpee.org

Dana Rickman
 Policy and Research Director

Massachusetts EPFP

Rennie Center for Education Research & Policy
www.renniecenter.org

Chad d'Entremont (EPFP '04–'05)
 Executive Director

Northeastern University
www.northeastern.edu

John Portz
 Professor, Department of Political Science

Michigan EPFP

Education Policy Center
 Michigan State University
www.education.msu.edu/epc

Christopher Reimann (EPFP '03–'04)
 Director of Communications, Office of K-12 Outreach

Daniel W. Schultz (EPFP '76–'77)
 Senior Development & Policy Advisor, Office of K-12 Outreach

Minnesota EPFP

Center for Policy Studies
www.centerforpolicy.org

Dan Loritz (EPFP '79–'80)
 Senior Fellow and President

Randy Johnson (EPFP '77–'78)
 Senior Fellow

Mississippi EPFP

John C. Stennis Institute of Government
 Mississippi State University
www.sig.msstate.edu

Tyson Elbert (EPFP '07–'08)
 Research Associate

New York EPFP

Teachers College, Columbia University
www.tc.columbia.edu

Robert J. Monson (EPFP '88–'89)
 Adjunct Associate Professor, Department of Education Policy and Social Analysis

Westchester Putnam School Boards Association
www.wpsba.schoolfusion.us

Lisa Davis (EPFP '10–'11)
 Executive Director

Center for Educational Leadership Putnam/Northern Westchester BOCES
www.pnwbores.org/

North Carolina EPFP

Public School Forum of North Carolina

www.ncforum.org

Emma Lee (EPFP '11–'12)

Director of Public Policy and Research

Jo Ann Norris

NC EPFP Coordinator

Ohio EPFP

The Center for Educational Leadership

Cleveland State University

www.csuohio.edu/cehs/departments/CASAL/cel.html

Deborah E. Morin (EPFP '82–'83)

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Pennsylvania EPFP

The Education Policy and Leadership Center

www.eplc.org

Ron Cowell

President

Mattie Robinson (EPFP '10–'11)

Manager of Operations and Communications

South Carolina EPFP

South Carolina School Improvement Council

<http://sic.sc.gov>

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Washington, DC EPFP

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Montgomery County Public Schools

Dahlia Shaewitz (EPFP '09–'10)

Senior Research Analyst

American Institutes for Research

Amy Yamashiro (EPFP '09–'10)

Data Coordinator

Arlington Partnership for Children, Youth, and
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Global EPFP

Institute for Educational Leadership

www.iel.org

Education Policy Center

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www.education.msu.edu/epc

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Mikaela Seligman
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Maurice Sykes
Charles Taylor
Carol Valdivieso

West Virginia

EPFP

Van Dempsey
Craig McClellan

** Deceased*

About the Institute for Educational Leadership



families. Bound by no constituency, IEL serves as a catalyst that helps policymakers, administrators, and practitioners at all levels to bridge bureaucratic silos and undo gridlock to improve outcomes for all young people and their families.

The work of IEL focuses on three pillars required for young people and their communities to succeed:

- ✦ Involving the broader community with public education to support the learning and development of young people.
- ✦ Building more effective pathways into the workforce for all young people and supporting the transition to adulthood.
- ✦ Preparing generations of leaders with the know-how to drive collaborative efforts at all levels.

For a half-century, the Institute for Educational Leadership has championed the need for leaders at all levels to shake off their institutional constraints and work across boundaries to address the needs of young people and their

Vision

A society that uses all of its resources effectively to provide an equal opportunity for all children and youth to learn, develop, and become contributing citizens of our democracy.

Mission

To equip leaders to work together across boundaries to build effective systems that prepare children and youth for postsecondary education, careers, and citizenship.

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