Building an Organization That Can Help the Sector Learn: Creating Team Interdependencies at the Learning Accelerator

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Building an Organization That Can Help the Sector Learn:
Creating Team Interdependencies at The Learning Accelerator

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
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Dedication

For Zev and Joshua: You remind me who I am by being who you are.
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Abstract

In a growing number of school districts across the country, educators are using blended learning (the strategic integration of in-person learning with technology) in order to provide more equitable, accessible and engaging experiences for the students they serve. But in an education system that is not well-organized to scale or sustain innovation, even the most successful models operate largely in isolation with no clear mechanisms to bring them into mainstream practice elsewhere in the sector. The Learning Accelerator (TLA) is a national, non-profit “ecosystem accelerator” that works to address this problem by seeking out and capturing high-potential strategies, building networks to test and adapt them, and then strategically disseminating these strategies at scale. However, given the vast size and complexity of the sector, TLA must not only be able to coordinate and mobilize players in the blended learning space, to be effective it must also build its own capacity to do these things as well.

This capstone describes the development and early stage implementation of a human capital strategy developed for TLA as it transitioned from a small group of solo-practitioners working remotely to an interdependent and growing team capable of executing on a collective impact strategy. The project offers a window into the intricacies of organizational change as seen through the experiences of an ambitious start-up team. In this paper, I provide an overview of organizational structures that foster interdependence, including shared work products, clear goals, and formal structures for sharing information. I also explore the significant influence of team culture and historical narratives on both promoting and impeding change. Finally, the paper ends with reflections on how creating coherence internally can become a mechanism for organizations to achieve greater impact and build the capacity of the education sector as a whole.
Introduction

“Every organization has to prepare for the abandonment of everything it does.” - Peter Drucker

It was with this quote from Peter Drucker that the CEO of The Learning Accelerator (TLA), Dr. Beth Rabbitt, launched the organization’s April 2017 offsite meeting. Drucker’s quote, it turned out, was a particularly appropriate choice for this gathering. In his book, The Practice of Management, Drucker (1954) wrote that good organizational management is largely the practice of defining, prioritizing and enacting specific objectives accompanied by clear measures of success. Rabbitt and her then eight-person team at TLA, a start-up organization dedicated to the effective implementation of blended learning at scale in American K-12 schools, were gathered to talk about just that.

The offsite was intended to set organizational strategy and team objectives for the upcoming year. A conversation about activities, though, quickly turned into a conversation about measuring success. Questions arose from the group: “As our work changes, how will we know when we have fulfilled our mission?” “What does it mean to do a ‘good job’ in our current context?” “When our goals are student-focused but our work is system- and educator-focused, how will we ever know we are having the impact we want to have?” and finally, “What does success mean for us as a team?” A year following the most significant organizational transformation in TLA’s history, which included a change in organizational leadership and the departure of six staff members, the TLA team was in a place of transition - energized by new possibilities, but also seeking areas of clarity and predictability.
I was present at the retreat as a fresh hire, two months away from starting my residency, and was meeting the team in person for the first time. As a new team member, I was motivated by the warmth, the humor, and the comradery of the group. As an observer, I was also struck by the way the team seemed to effortlessly move between laid-back joking and intense, focused work. My first impression was that these were people who got things done. It was also a team that asked itself difficult questions. Across the two-day meeting, members acknowledged that they were not entirely clear about their direction and what changes they might have to make in order to fully realize a new strategy – including how to organize themselves in order to be successful.

This question of about how to organize for success as a small intermediary organization within the context of the vast American education system ultimately became the focus of my work with TLA for the duration of my residency. This capstone describes a human capital strategy that I developed and implemented collaboratively with the members of TLA as it transitioned from a group of solo-practitioners to a team organized to execute on interdependent work. It explores various components of organizational change, including the connection between changing behavioral routines and changing mindset, the influence of organizational culture, and most importantly, the ways in which creating collaborative structures within a small team mirror the challenges of creating them more broadly throughout the sector. The paper starts with an overview of The Learning Accelerator, what it aims to accomplish, and the context in which it operates. It then describes the steps we took to support better knowledge-sharing and collaborative practice within the organization and explores the lessons we learned, including an analysis of what worked, what did not, and why. Finally, the paper ends with reflections.
on the implications of this work for The Learning Accelerator, lessons for my own future leadership and relevant insights for the field more broadly, including how creating coherence internally can become a mechanism for organizations to effect greater impact and build the capacity of the education sector.

*The Learning Accelerator and a System Approach to Blended Learning*

TLA is a national, non-profit organization, founded in 2012, that works to advance access to high-quality blended learning experiences at scale throughout the American K-12 education system. Although TLA is a small start-up organization, currently employing a team of 12, it aims to have an outsized impact by working in partnership with organizations across the country to advance districts’ capacity to learn from one-another’s practices. TLA defines blended learning as “the strategic integration of in-person learning with technology to enable real-time data use, personalized instruction, and mastery-based progression” (“What is Blended Learning,” 2017), aimed at raising student achievement in a more equitable and holistic way than the traditional classroom generally provides (*Figure 1*).
TLA is part of a pioneering movement of non-profit organizations that have sprung up over the last decade to champion the idea that technology, when used well, can open doors to better content, richer connections, more diverse learning opportunities, and a more level playing field than a non-connected classroom can provide. The birth of today’s blended learning movement can be most directly traced back to the early 2000s, when a hedge-fund analyst named Salman Khan started tutoring his 12-year old cousin, Nadia, in math using videos he created over YouTube (she was in New Orleans and he was in Boston) (Khan, 2012). Three years later, he turned the idea into an organization called the Khan Academy, built around online lessons he had developed. While certainly not the first to create a program of distance education (that is credited to Sir Isaac Pitman
who taught shorthand by correspondence in Bath, England in the 1840s (Kentnor, 2015)), Khan holds a kind of allegorical status as the person who popularized modular, online learning.

Around the same time that the Khan Academy was gaining traction, Harvard Business School professor Clayton Christensen wrote a book in 2008, applying his theory of “disruptive innovation” to the education sector entitled *Disrupting Class*. This book argued that, systemic challenges notwithstanding, the most important thing holding back the American education sector was too little intrinsic motivation for students (due to a one-size-fits-all system) and that the way to combat this challenge would be to customize and personalize education, largely through the creative use of technology (Christensen, 2008). It could be argued that the marriage of these two ideas, that good education does not always have to be face-to-face and that education should be more personalized, birthed today’s blended learning movement. While teachers and students had been using forms of computer-based learning for decades (Chronaki, 2000), it was high-profile influencers like Khan and Christensen who helped popularize the appeal of blended learning as a unique model where students learn “at least in part at a supervised brick-and-mortar location away from home and at least in part through online delivery with some element of student control over time, place, path, and/or pace” (Horn and Staker, 2011).

TLA’s definition of blended learning has roots in these ideas, but also pushes them further to outline a more precise and deliberate goal than simply integrating in-person learning with online delivery. Specifically, TLA’s view of blended learning focuses less on the modality (what kind of technology is used and how) and more on the
objectives of integrating technology into the classroom environment with an aim to, “improve, facilitate, and extend learning within and beyond school time” (“What is Blended Learning,” 2017). This aim for improvement, facilitation and extension has particular objectives: 1) use real-time data to “continuously monitor progress” and create a “cycle of analysis and action to understand and change the trajectory of learning,” 2) develop a “student-centered instructional approach that individualizes learning for each student based on specific strengths, needs...interests… and goals,” and 3) support mastery-based structures “that allow for a student to advance to new content based upon mastery, not seat time” (Figure 2).
Blended learning is the integration of:

**IN-PERSON LEARNING**

- Face-to-face instructional interaction between teachers and students within a school environment. Includes different modalities:
  - Direct instruction
  - Peer-to-peer
  - Group (small and whole)
  - Individual/Reflective

**TECHNOLOGY**

- Online tools (teacher- and student-facing) used to improve, facilitate, and extend learning within and beyond school walls and time. Include:
  - Hardware (devices)
  - Software (content delivery, assessment, and data systems)
  - Internet connectivity (school and home)

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**REAL-TIME DATA USE**
Systems and routines to continuously monitor progress to inform tailoring of instruction to need and choice.
- Clear, understandable record of student progress (activities and outcomes)
- Cycle of analysis and action to understand and change trajectory of learning
- Used at/by multiple levels of system-student, teacher, school, district, and parent

**PERSONALIZATION**
Student-centered instructional approach that individualizes learning for each student based on specific strengths and needs, student interests, and/or individualized goals.
- Allows for differentiation of pace, path, place, and modality
- Creates opportunities for greater student choice and agency
- Requires the flexible allocation of resources, including time, content, space, groupings, and staff/people

**MASTERY-BASED PROGRESSION**
Structures that allow for a student to advance to new content based upon mastery, not seat time.
- Common articulated learning standards
- Definition of and measurement for mastery
- Understanding of the relationships between concepts and how they build upon one another to form a pathway to mastery

Figure 2: TLA’s Blended Learning Framework (“What is Blended Learning,” 2017)
Real-time data use, personalization and mastery-based progression are essential ingredients, but not the end goal, from TLA’s perspective. Rather, the organization believes that these three components further the kind of learning environments that nurture in students the skills and mindsets needed to succeed in college and beyond. Ideally, they also support an environment where teachers can be engaged learners themselves (Figure 3).

Rather than operate as a vendor or fee-for-service consultant in the blended learning space, TLA works as a nonpartisan “ecosystem accelerator” that helps organizations, school districts and Charter Management Organizations (CMOs) understand and implement blended learning more effectively, efficiently and with more support than they would otherwise be able to easily access. TLA carries out its work virtually, which means that there is no “central office” to which members of the

![Figure 3: TLA’s Theory of Action for Blended Learning (“What is Blended Learning,” 2017)](image)
organization commute. Instead, the now 12 members of TLA live across the country, in cities including San Francisco, Seattle, Denver, Austin, and Boston, and communicate remotely. Meetings are conducted via video-conference and phone calls, and make heavy use of online collaborative tools (such as G-suite, which enables multi-person creation and sharing of written content). Team members meet several times each year in person, at conferences or during work collaborations, and twice to plan together as a full team. This affords the team tremendous flexibility and wide networks, but also creates a challenge for both coordination and collaboration.

TLA’s organizational strategy shifted substantially as both its context and leadership changed. TLA’s original vision was to “sunset,” or dissolve itself, after five years. It would do this by hiring people to systematically identify the largest barriers to blended learning implementation that existed in the sector (such as a lack of professional development opportunities for teachers to learn how to teach using blended strategies), and then invest time, resources or money towards removing those barriers. This vision emerged out of a context, in 2012, where many schools had invested in technological devices (the number increased 71% between 1999-2012) with little clarity about how to use them well (Dobo, 2016). Experiments in blended learning, such as flipping classrooms, peppered districts across the country, but were disconnected and often lacked the underlying infrastructure (e.g. human capital, technological know-how, etc.) to succeed long-term (Ash, 2012). There was no clear mechanism for bringing these isolated experiments to scale in a coherent way, or to determine their relative success.

The founding CEO of TLA, an entrepreneur named Scott Ellis, aimed to raise $100 million over five years to build this infrastructure. “If you want the benefit to happen at
the individual level,” Ellis told me in an interview, “you need a series of things to occur - for example, you need connectivity, but you also need devices. And you also need teacher training, etc. This intervention has a lot of pieces, but none of them is rocket science. That’s why it made sense to create a system-level catalyst investing in multiple places at once.”

Ellis, who had two decades of experience in the for-profit sector at companies such as McKinsey and Co. and Hewlett-Packard, held a distinctly market-driven approach to transforming the education sector. He believed that a catalytic reaction would take place with the right investment. “We are already using technology everywhere in our lives,” he explains. “The weird thing is school where we’re still using paper and pencils. If we could show people how to use technology and prove that it’s better for kids, market forces will take over and it will become a wave you can’t stop.” Ellis’s vision was less concerned with the slow, incremental march of, for example, mindset shift or school design, and more focused on what he saw as tangible, shorter-term barriers, such as a lack of broadband access, that the organization could tackle and remove.

At the time of its founding, and for several years thereafter, Scott Ellis created an organizational structure that was “hub and spoke,” built around one-on-one relationships between himself and project leaders running independent streams of work. This structure meant that different project leaders rarely collaborated strategically, focusing instead on their particular corner of the blended learning market. The success of the organization depended on each independent “bet” creating value, rather than building a unified whole.

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1 This quote, and any that follow without direct attribution, have been drawn from my personal communication, including in-person and virtual conversations, and written correspondence.
out of different workstreams. The organizational culture that developed prioritized autonomy, efficiency, and high levels of production.

In its first three years, TLA raised approximately $20 million, expanded to a team of twelve employees (most of whom were called “partners,” to highlight a flat organizational structure), and launched a number of explorations (and substantial investments) into areas such as broadband connectivity, online curriculum resources, professional development, technology procurement, and policy. Several of these ventures, such as Open-Up Resources, a non-profit that provides free online electronic curricula to districts, eventually spun off into their own, independent ventures. But the full $100 million never materialized, perhaps because the organization was ahead of its time or perhaps because funders were not fully persuaded by the reliance on market forces in the context of a fragmented and slow-moving education system. TLA’s own successes also contributed to its funding challenges, as new organizations emerged to directly tackle some of the barriers TLA had identified.

In 2016, Dr. Beth Rabbitt, a founding TLA partner, took on the CEO role to lead the organization. This transition was a substantial change, not only in personnel (the organization downsized as it narrowed its focus) but also in approach. While Ellis’ professional roots were in the corporate sector, Dr. Rabbitt’s were in the education sector. Dr. Rabbitt had been part of a founding team for a blended learning school, led a national study on the state of blended practice, and had led TLA’s human capital practice for several years, working with teachers, school leaders and service providers to bring teacher professional development more in line with the shifting technological landscape.
Under Dr. Rabbitt’s leadership, and based on a year-long review of progress nationally and organizationally, TLA moved away from operating as a funding and incubation organization and focused on a key insight that had emerged over the previous three-plus years of work. This was that lack of capacity, uneven external support and poor infrastructure made the likelihood of districts sharing their insights and resources with each other improbable at best. TLA’s original theory, of channeling investment into such a disjointed system, had proved more useful for addressing technical challenges (like access to broadband) than the deeper, systemic barriers that ultimately drove mainstream practice.

Dr. Rabbitt and her team recognized that TLA had the expertise, appropriate system lens, and high-trust relationships with practitioners and service-providers to help districts coordinate and calibrate around high-quality practice. They pivoted away from targeted investment and doubled down on their role as what Cohen and Mehta (2017) refer to as an “intermediary organization” whose function it is to support classrooms by “building the professional infrastructure… necessary to consistently develop high-quality instruction and assist schools as they learned to use [it]” (p.682).

To develop this infrastructure, TLA focused on the following activities from mid-2015 to mid-2017:

- TLA partners visited schools across the country and captured diverse approaches to both classroom and whole-school shifts using blended learning. On its “Blended and Personalized Learning at Work” website, TLA broke down these models into sets of strategies that teachers, school and district leaders, and researchers can search and explore, including videos of classroom practice,
artifacts (such as downloadable worksheets, implementation guides or classroom rubrics), and explanations from school leaders about how their model evolved and how they fit the pieces together. Monitoring traffic to this site also enabled TLA to see what practices are gaining traction and are proving to be the most helpful to teachers.

- TLA took on a coordination and advisory role among technical service providers in the blended learning space – aggregating information, advising others on their organizational strategies and convening organizations together to share their own best practices and knowledge bases. A 2017 partnership with the design firm IDEO, for example, enabled teachers across the country to be supported bringing forward their own ideas to further personalize learning in their own (and others’) classrooms.

- In order to make sure the organization continued to stay connected to real-world practice, TLA also convened and/or interviewed more than 150 school principals and district leaders across the country to understand the specific challenges they faced, what practices had proven successful, and what motivated them to personalize learning in their districts in the first place. This gave TLA members insight not only into national patterns, but also regional ones, which could then be shared back with schools as well as technical service providers in those areas.

- Additionally, TLA produced (both alone and in partnership with other blended learning organizations) written materials to help districts and CMOs personalize and blend learning at a system level. These include, for example, a Communications Guide for school and district leaders to explain the value of
blended learning to various stakeholders, a Measurement Agenda that walks practitioners through the process of conceptualizing and implementing a rigorous measurement and evaluation process for blended learning, and a Blended Learning Implementation Guide that offers structured and staged advice and resources for district leaders who are looking to implement blended learning as part of their strategic agenda.

Additionally, for the first time in its history, previously independent partners were combined into three sub-teams: 1) Research & Development (R&D), 2) Communications, Dissemination, and Engagement (CDE), and 3) Internal Operations (Ops) (Figure 4). As Dr. Rabbit explained, “We used to be driving on different roads, but now we’re driving on the same road. And so, we need to understand what it looks like to drive in the same direction and not crash into each other...Our work used to be the sum of individual parts, now it needs to be bigger than the sum of its parts.”

Figure 4: TLA 1.0 vs. TLA 2.0: Output Drives Working Structures
By “driving on the same road,” Dr. Rabbitt was explaining that the TLA team would have to build its capacity not only to coordinate more actively with one-another (for example, by increasing the amount of information members shared across projects to avoid overlaps or redundancies), but it would need to build its collaborative muscle as well. When partners each owned different strands of work, there was little need to produce shared work. But Dr. Rabbitt did not envision separate projects in separate spheres, but rather a set of integrated projects that together built up the knowledge-sharing capacity of the sector.

Furthermore, Dr. Rabbitt believed that in order for TLA’s work to accelerate, its activities had to be both coherent and mutually reinforcing, not only for the sake of creating a robust set of outputs, but also because creating coherence is precisely what TLA aimed to do for the field. For innovations like blended learning to have any chance of effecting mainstream change, an almost impossibly disconnected set of actors in the sector must not only adopt similar beliefs about its value, but also have the capacity and willingness to work together to (for a start) implement new classroom practices, create new teacher training, develop new policies, and measure new outcomes. This is particularly difficult in a climate where fears about the impact of technology are on the rise, thanks in part to prominent system failures such as the covert hacking and manipulation of data from millions of Americans on platforms such as Facebook (Rosenberg et al., 2018). It is also made more challenging due to some failed experiments in blended learning itself, where schools, eager to show the value of adaptive technology
created quiet, plugged-in spaces with minimal group interaction (for example, Emerich, 2018).

For a small start-up like TLA, with its 12 members dispersed throughout the country, taking on even a piece of this sectorial challenge is audacious. Yet TLA benefits both from considerable agility (relative to larger, bureaucratic institutions) and also a pristine reputation of neutrality because, unlike many of its peers, it does not sell its services to districts. TLA is therefore in a unique position to bring together other intermediary organizations and leaders and practitioners in districts across the country to create a more coherent narrative about blended learning and to seed an evidence-based approach to implementation. In order to maximize the team’s chance of having a meaningful impact, however, TLA’s leadership is asking members to seek out places where collaboration between teams or projects could lead to more effective and nuanced outputs. This means transforming an organization designed for autonomous practitioners into an organization that braids together activities into interlocking strands. Given the substantial culture shift this requires, TLA’s leadership faces a key problem of practice: *How can TLA effectively shift from a group of individuals to an interdependent team, organized around a coherent collective impact strategy?* More strategically: *How can TLA develop its own collective capacity internally that will enable it to build the capacity of others in the sector?*
By its nature, the act of organizational transformation is a marriage of opposing forces. Deep organizational tradition meets the optimism of new ideas. Predictability meets the unknown, and comfort meets disruption. Ronald Heifetz and Donald Laurie have famously written that one of the key roles of leadership is helping people through the loss that comes from adopting new ways of working, while still maintaining the desire to stay the same (Heifetz and Laurie, 1997). As a start-up, The Learning Accelerator names flexibility and continuous improvement as two of its core values, acknowledging that one of the powers of a small team is to retain an agility and ability to change that large bureaucracies cannot (“Vision-Values,” 2018). At the same time, agility does not remove the pain that change produces.

As members of TLA embrace a new strategy and the excitement it brings, they inevitably face some trepidation about the personal shifts they must make in order to accomplish it. To better understand this dilemma, I have considered two sides of this challenge: What we are trying to move towards (the change) and what forces may keep us stagnant (the challenge).

**The Change**

I. What organizational structures might help the TLA team to collectively reach its strategic goals?
   a. Team structures that foster coherence
   b. The importance of reflexivity

**The Challenge**

II. What can research on behavioral dynamics tell us about what might cause members of the TLA team to be more or less resistant to change? What factors inhibit organizational culture from changing in order to meet a shifting context?
I. What organizational structures might help the TLA team to collectively reach its strategic goals?

There is a sizable and growing body of formal literature on distributed teams, but only a small (and relatively informal) amount on virtual organizations. This is perhaps because the notion of a virtual organization has only gained traction as technology has arisen to enable it. According to Watson-Manheim et al., the common thread that ties together virtual teams is the notion of discontinuity (e.g. gaps in aspects of the work, such as setting, task or relations with other workers) (Watson-Manheim et al., 2002). One of the more elegant (and early) definitions of virtual teams comes from Lipnack and Stamps who describe, “A group of people who interact through interdependent tasks guided by a common purpose” and work “across space, time, and organizational boundaries with links strengthened by webs of communication technologies” (Lipnack and Stamps, 1997). A key challenge for dispersed teams, TLA being no exception, is achieving the interdependence that Lipnack and Stamps (1997) describe.

There is no clear evidence that virtual teams perform better or worse than face-to-face teams; research is inconclusive and contradictory (Maznevski and Chudoba, 2000). Many tout the promise of cross-functional, dispersed teams as a way to induce more speed, creativity and flexibility in the face of a rapidly changing, diverse, and technologically advancing society (Sole and Edmondson, 2002). Through dispersion, teams gain greater access to expertise, can extend their working hours and can create closer relationships with more varied and dispersed partners/customers (Hinds and Bailey, 2003). Members of TLA agree that the diversity of relationships the team holds across the country is one of the most valuable strengths of the organization. Yet as the
team organizes to leverage these relationships in a coordinated way to facilitate a more coherent conversation about blended learning across the sector, TLA’s members also must address the efficacy of their internal knowledge sharing and coordination. What organizational structures might enable TLA to transcend the physical barriers of dispersion and pull together in an integrated way?

Team Structures That Foster Coherence

Despite their different areas of focus (e.g. execution, learning, or innovation, etc.), scholars on teaming, organizational learning, and organizational performance converge strongly (and have likely influenced each other) around structures that enable groups of people to work together in coherent and even interdependent ways. One school of thought, held by practitioners such as Jon Katzenbach and Douglas Smith at McKinsey and Company (1993) and researchers such as Richard Hackman, Ruth Wageman and their colleagues, focus mostly on helping teams become clearly defined (bounded), stable, and well-structured (Hackman, 2002, Wageman et al., 2008). Others, like Amy Edmondson and colleagues David Garvin and Francesca Gino, highlight the dynamic nature of the “complex, adaptive systems” that comprise work in the modern economy (Garvin et al., 2008, Edmondson, 2012). Edmondson writes, rejecting the notion of teams as static entities, “Trying to understand, much less predict, what happens in such systems when one is expecting linear, unidirectional relationships...will produce flawed results” (Edmondson, 2012, online edition). Edmondson focuses more on investing in capabilities, behaviors and mindsets (such as speaking up or engaging in continuous learning through experimentation).
Yet Edmondson and her colleagues also outline organizational structures that enable the development of these capabilities (Garvin et al., 2008). An organization is more than the sum of its parts. As Cook and Yanow (1993) write, “It is not meaningful to say that the ability to play Mahler symphonies is possessed by an individual musician, because no individual person can perform symphonies” (p.377). Individual capabilities alone are also subjective and the perception of them can change based on context. (Johns, 2006). For example, being “an individualist in an individualistic culture might engender different attitudes and behavior than being an individualist in a collectivistic culture” (p.388).

Furthermore, team members’ and leaders’ capabilities can remain unseen or underdeveloped on poorly structured teams (Chouhan and Srivastava, 2014). If an organization is to succeed in the long-term, it must have the capacity to survive changes in personnel and even leadership. There is therefore value in exploring the structures that guide the interactions of people and how they work together, rather than the characteristics of the people themselves.

What, then, is the value of working together? Wageman et al. (2008) write that collaborative structures are required when “complexity calls for debate, for broad knowledge, for synthesized ideas and creative plans, and for the deft orchestration of decisions” (p.30). Beyond the surface insight that complex tasks require many minds working together, the authors are also illustrating that the form of teams should follow the function they perform. Amy Edmondson (2012) is even clearer on this point, writing that teaming is “absolutely critical to success when any of the following conditions are present:
● the work requires people to juggle multiple objectives with minimal oversight
● people must be able to shift from one situation to another while maintaining high levels of communication and tight coordination
● collaborating across dispersed locations
● preplanned coordination is...unrealistic due to the changing nature of the work
● complex information must be processed, synthesized, and put to good use quickly” (p.25).

Because TLA is such a lean organization, team members are continually multi-tasking through numerous projects with different timelines and types of output. Additionally, the organization operates by continually fundraising to support its projects. This means that the rate at which information is “synthesized and put to good use” is particularly urgent.

In a startup culture like TLA’s that prides itself on flexibility and informal working styles, creating organizational structures to foster teaming can feel onerous at best, even if theoretically valuable in the long-term. According to Gulati and Desantola (2016), “Founders tend to view formal structures and processes... as bureaucratic threats to their entrepreneurial souls” (p.4). They also “worry about losing speed, control, and team intimacy. When they eschew order and discipline, however, they pay a steep price: chaotic operations and unpredictable performance.” The authors highlight that clear managerial structures often save leaders from becoming the “bottleneck that hinders information flow, decision-making and execution.” Wageman et al. (2008) agree that it is these disciplined and explicit structures that prevent people with different agendas and visions from having “no team focus, no shared direction, and, as a result, no traction” (p.8). Richard Hackman notes that too much freedom can be just as constraining as not enough, calling it the “tyranny of structurelessness” (Hackman, 2002).
All of this said, some caution must be applied before jumping wholesale into endorsing a litany of structures resembling the large bureaucracies that govern the lion’s share of the education sector (and whose performance is hardly unimpeachable). On balance, public institutions rely heavily on structural change alone as a driver for improvement - with limited success (Childress et al., 2011). The answer, then, is not to rely on structures for their own sake (as Gulati and Desantola, 2016, also emphasize), but to acknowledge that processes left implicit require people to do guesswork. Instead, we might define “structures” as a category of things which should be made reliably explicit between people working together to increase coherence and coordination, rather than set rules that everyone must follow. As Jarzabkowski et al. write, the goal is to “shift the analytic focus from coordinating mechanisms as reified standards, rules, and procedures to coordinating as a dynamic social practice” (Jarzabkowski, 2012, p.907). The following are broad categories that I have seen surface frequently in the literature in service of supporting high-functioning teams.

**A compelling, shared goal:** Katzenbach and Smith write in their article “The Wisdom of Teams,”

The essence of a team is common commitment. Without it, groups perform as individuals; with it, they become a powerful unit of collective performance...The best teams invest a tremendous amount of time and effort exploring, sharing and agreeing on a purpose that belongs to them both collectively and individually. This “purposing” activity continues throughout the life of the team (1993, p.112).

Wageman et al. (2008) agree that a clear goal is as important as a challenging one. “Clarity of purpose,” they write, “make extraordinarily challenging and consequential work...feel possible” (p.62). Clear goals unite a team, especially if they know where they
are going, but have freedom around the means to get there (Hackman, 2002). They also, as Ranjay Gulati and Alicia Desantola (2016) remind us, help start-ups move from “aimless riffing” to developing an ability to predict and measure success (p.7).

Yet for all this clamor about clear goals, it is not always easy to create them. Wageman et al. underline this challenge when they write,

> Of the three qualities of great leadership team purpose - consequentiality, challenge, and clarity - establishing clarity is the hardest. One executive aptly described the typical state of things: ‘Our team purpose is extremely important and extremely challenging...if only we knew what it was’ (2008, p.64).

For TLA, this difficulty is compounded by both the abundance of divergent goals in the education sector as a whole and also by the indirect impact model that TLA holds. Unlike for-profit organizations who typically sell directly to customers and can measure performance directly through revenue numbers, TLA, like many education non-profits, places students at the heart of its mission, but engages educators and sector leaders as its core “customer” base. While establishing clarity of activity (what we do) is a relatively straight-forward, if challenging, strategic matter, showing how those activities will successfully make an impact for the sector is much harder. For instance, if a growing number of people begin to utilize TLA resources, does that mean the organization has had its desired impact? For organizations like TLA that operate at the system level, tracing impact through to classroom experience on more than an anecdotal basis is extremely difficult. Finally, evidence for the impact of blended learning is still being gathered (see Pane et al., 2017, for recent research), so TLA is, in a sense, driving forward with a series of thoughtful, educated guesses that must change as the evidence
accumulates if it is to stay relevant. Thus, setting clear goals for TLA is equally imperative and provisional.

The distributed structure of TLA can make it difficult for team members to engage in shared work. While distributed teams may have access to more diversity of thought, they have a harder time simply working together and making use of that diversity to create shared outputs (Wong, 2004). Soule and Applegate (2009) explain that while “thinking and doing alone” remain unchanged in a virtual organization, “thinking and doing with others” is challenged. “We thus propose,” they write, “that the capacity to engage effectively in a repertoire of different learning practices is crucial for teams comprising members from diverse functions and locations” (p.27).

Explicit working and learning practices create “continuities” that bridge the gaps inherent in distributed working environments (Watson-Manheim, 2002). Members of virtual teams must take extra pains to define things like working norms, group goals and methods to hold each other accountable to make sure that the “discontinuities” of time and space do not erode momentum and mutually satisfying outputs. They must also be purposeful in defining what these shared outputs are to avoid the risk of slipping into “divide and conquer” model, thus never making full use of their diversity and creative potential.

*The ability to take risks (psychological safety):* Amy Edmondson has been the key champion advocating for the importance of “psychological safety” on teams (defined as “a shared belief that the team is safe for interpersonal risk-taking”) (Edmondson, 1999, p.354). The notion is not that teams should be places where no one is pushed out of their
comfort zone, but the opposite: that complex problem-solving on teams is improbable unless team members feel it is safe to take the risk to speak their minds. Edmondson’s focus on psychological safety advances the ideas of theorists like Argyris and Schon (1978) who described in depth the emotional defensive barriers that prevent organizational effectiveness. Argyris in particular has argued that self-protective behavior, leading to a lack of individual and team introspection, is the key barrier to team improvement (Argyris, 1991, and Argyris, 1994). According to Edmondson, psychological safety is the most important predictor of team learning (Edmondson, 1999).

The idea that risk-taking is a critical component to both organizational performance and individual growth sits at the core of Bob Kegan and Lisa Lahey’s more recent work on Deliberately Developmental Organizations (Kegan and Lahey, 2016). Without the safety to expose our struggles as well as our insights, Kegan and Lahey explain, people spend the majority of their working lives hiding from one-another, producing a massive waste of talent and organizational output. Lencioni (2002) also lists absence of trust a key driver of poorly performing teams: “It is only when team members are truly comfortable being exposed to one another that they begin to act without concern for protecting themselves” and can then offer and ask for assistance from others (Lencioni, 2002, p.196).

Hackman explains that teams must make room for dissent and challenge, even if it feels personally risky (Hackman, 2004). But while Hackman agrees that team members must feel safe to engage productively with one another, he suggests that the causal relationship might be the opposite of what Lencioni writes:
People generally think that teams that work together harmoniously are better and more productive than teams that don’t. But in a study we conducted on symphonies, we actually found that grumpy orchestras played together slightly better than orchestras in which all the musicians were really quite happy. That’s because cause-and-effect is the reverse of what most people believe: When we’re productive and we’ve done something good together (and are recognized for it), we feel satisfied, not the other way around. In other words, the mood of the orchestra members after a performance says more about how well they did than the mood beforehand (Coutu, 2009, p. 4).

On a team that is actively problem-solving through an unknown future, psychological safety is foundational for risk-taking, experimentation and, as I will explore below, for enabling reflexive behavior on the team (Widmer et al. 2009).

Because of the “discontinuities” of space and time, building trust in a virtual organization can be a fragile proposition. It can especially be hard to keep trust once it is built, absent the informal warmth of after-work drinks, conversations around the coffee machine or simply standing in someone’s doorway when taking a thinking break (Maznevski and Chudoba, 2000). According to Hinds and Bailey (2003), fewer in-person interactions can make task conflict and affective conflict seem more strongly related than they might otherwise be (e.g. you did something differently than I would and now I like you a little less). Returning to the concept of psychological safety above, it is a small jump from this to suggest that the kind of trust that enables people to take risks (such as the willingness to take up Lencioni’s charge to hold team members accountable to the organization’s mission) can be more difficult to cultivate or simply easier to avoid when working remotely. Therefore, attention needs to be paid to construct deliberate learning structures, such as Edmondson’s four pillars (speaking up, collaboration, experimentation, and reflection) to reinforce (and be reinforced by) that trust (Edmondson, 2012). This responsibility falls largely on the leader, who must create the
conditions for risk-taking exploration and experimentation, but is reinforced through organizational structures.

I extrapolate that clear goals and psychological safety may mutually reinforce one another. Clear objectives motivate collaboration and can stimulate both creativity and high intellectual engagement among teams, especially if achieving them is hard, but plausible. Psychological safety enables all this creative engagement to surface and build, rather than being stifled or held back for fear of negative repercussions. Absent a clear goal, people have no reason to collaborate; absent psychological safety, people do not feel comfortable enough to engage with one another.

**Role, task and decision-making clarity:** Discussions about organizational roles, tasks, and guidelines for decision-making can be painful for entrepreneurs who seek agility. The phrase “navel gazing” is popular at TLA to describe any time spent on team process, rather than pushing out external-facing work. Yet the irony is that clearly delineated roles and areas of authority often enable people to work faster and streamline their working processes (Gulati and Desantola, 2016). Clarity in this case means defining who has responsibility to make decisions, who has input, and who is charged with putting them into action (Rogers and Blenko, 2006). Absent clarity about roles and decision-making authority, people hesitate or overstep, and often waste considerable energy making up stories about why things are happening the way they are.

Clearly delineated roles and areas of authority also enable people to make faster, smarter decisions locally. They streamline the process, rather than gum it up, and promote individuals' development. The more decisions people are empowered to make on the ground, the more they learn and the more accountable they become (Gulati and Desantola, 2016, p.7).
Decision-making clarity is particularly important for teams to make explicit in order to overcome sluggish outputs or conflict. “At many companies,” write Paul Rogers and Marcia Blenko, “decisions routinely get stuck inside the organization like loose change. But it’s more than loose change that’s at stake, of course; it’s the performance of the entire organization” (Rogers and Blenko, 2006, p.53). It is also the performance and investment of each individual: to take a personal example, frustration over a lack of clarity about my own decision-making authority led me to eventually leave a previous job. Over time, clarity enables greater levels of individual commitment to the larger team goal (Lencioni, 2002).

**Transparent knowledge sharing and accountability:** Mutual accountability (that is, when team members themselves define what it means to be accountable to one-another) is one of the key elements that distinguishes a genuine team from a “co-acting” group, where accountability is held solely by a leader (Katzenbach and Smith, 1993). Defining group measures of success can produce higher outputs and greater equity of reward when tasks are complex and multifaceted (because it is often difficult to pin down who did what) (Corts, 2007).

Yet, there is a difference between accountability defined by the group itself, and that set by an external entity. As Elmore and Fuhrman (2004) write, when analyzing the effectiveness of school accountability regimes:

A school’s ability to respond to any form of external performance-based accountability is determined by the degree to which individuals share common values and understandings about such matters as what they expect of students academically, what constitutes good instructional practice, who is responsible for student learning, and how individual students and teachers account for their work and learning (p.68).
In order to be effective, in other words, accountability measures must feel reasonable to motivate those who are being held to account. This creates a special dilemma for virtual organizations when the informal (yet powerful) accountability of seeing a person at his or her desk is absent (Handy, 1995). While organizations like TLA are looking for alternatives to “seat time” as an accountability measure for students, they face their own struggles around how to determine the quality and, more problematic, the efficiency of team members’ work. Handy (1995) writes,

Trust is the heart of the matter. That seems obvious and trite, yet most of our organizations tend to be arranged on the assumption that people cannot be trusted or relied on, even in tiny matters. Oversight systems are set up to prevent anyone from doing the wrong things, whether by accident or design (p.44).

Leaders of virtual organizations have almost no practical choice but to turn this model around and start from a place of trust. Because external performance management by leadership (to anything beyond outputs such as written work or meetings attended) is so difficult to enact, mutual accountability between team members becomes an even more important lever.

Yet performance management is not the only value created. Accountability has a deep and sometimes counter-intuitive relationship to trust (Lencioni, 2002). Far from eroding trust (due to feeling “watched” or monitored), the clarity that comes from understanding how excellence is defined can lead to increased feelings of ease. In a study of accountability systems in New York schools, for example, higher teacher accountability was positively correlated with stronger psychological safety (Childress et al., 2011). Yet, Lencioni writes,
Team members who are particularly close to one another sometimes hesitate to hold one another accountable precisely because they fear jeopardizing a valuable personal relationship. Ironically, this only causes the relationship to deteriorate as team members begin to resent one another for not living up to expectations and for allowing the standards of the group to erode (p.213).

Friendly teams must therefore doubly invest in structures that enable active accountability to one-another. This rings particularly true for a small organization like TLA that team members describe as being “like a family.”

People who live side-by-side can often overestimate their mutual knowledge and ability to hold one-another accountable. One study, for example, found that husbands and wives were more over-confident, but no more accurate, in identifying what their partners were communicating than strangers were (Savitsky et al., 2011). Yet there is no doubt that merely existing in the same place has some benefits when it comes to sharing knowledge. If we are both walking through a rainstorm, we do not have to communicate in order for us to both have that information.

As Sole and Edmondson (2002) explain, knowledge is a source of organizational advantage, and locally shared or “situated” knowledge is unlikely to be dispersed unless its value is explicitly understood in the context of a conversation. Furthermore, awareness of a colleague’s expertise is acquired gradually and informally. It is rarely discussed or documented explicitly and so it can remain hidden or unrecognized by remote team members (Sole and Edmondson, 2002). Cramton (2001) draws an explicit causal link between communication challenges and work output, claiming that with less “shared reality,” good decisions are harder to make, faulty attributions are more common and communication errors are likely to lead to diminished outputs.
All of this suggests that deliberate knowledge sharing, especially of information that may seem unimportant or “off topic” for accomplishing a particular project is vital for members of a distributed organization to hold one-another accountable and to share adequate information. Some virtual organizations, like app coordinator Zapier, for example, have tried to codify some communication tools, but this is still an evolving field where best practices are, ironically, shared informally.

The Importance of Reflexivity

Another key element of successful team performance is an ability to be reflexive. Reflexivity is defined as the extent to which teams collectively reflect upon and adapt their working methods and functioning (Schippers et al., 2012). Far from being a feel-good task that serves to distract from the “real work” of the organization, a team’s reflexive capacity is highly correlated both its effectiveness and its capacity to learn and improve (De Dreu, 2007).

When the potential for information breakdown is high, such as on a distributed team, reflexivity can stem confusion, misunderstanding or withholding of information (Schippers et al, 2014). Schippers explains that this is achieved “by ensuring that teams discuss and assess the implications of team information for team goals, processes, and outcomes” (P.734) (Figure 5).
A number of researchers have also found a direct relationship between reflexivity and higher levels of innovation and creativity, as well as the ability to rally around a shared vision. (Schippers, 2004, Widmer et al, 2009, Schippers, et al., 2015). According to Schippers, West and Dawson (2015), reflectivity brings the self-awareness to a team, even in times of considerable stress, that enables creative problem-solving. Given the new territory that TLA is charting, and the uncertainty that accompanies it, these stressors are ever-present and thus this kind of creative capacity is continually required.

Reflexivity also has a relationship with team diversity. Diversity fosters consideration of non-obvious alternatives, which encourages communication and, in turn, reflexive behavior (Widmer et al., 2009). Yet, as Widmer et al. point out, diversity can also shift the conditions under which teams engage in reflexive behavior. While homogeneous teams can engage in high levels of reflexivity in the presence of a directive leader, heterogeneous teams respond better to shared decision-making. This means that,
as teams diversify, their modes of interacting may need to shift as well to maintain the same levels of reflexive behavior.

II. What might prevent the TLA team from shifting their behaviors and beliefs in the face of new organizational structures?

Leading an organization, even a small start-up, in a change process that includes examining and shifting current ways of working and interacting is not a simple or merely a technical process. As Ronald Heifetz and Marty Linsky (2002) have written, all change involves some kind of loss, be it simple (like a routine) or complex (like an identity). Aaryn Schmuhl, the Assistant Superintendent for Leadership Services in Henry County Schools, Georgia, who has been leading a change movement in his district for several years, calls it a “grieving process.” “People need time to struggle and they need time to let go,” he explained to me. It is not enough to think about organizational structures absent the people who use them. Instead, it is vital to have a deep understanding of what leads people to resist change in order to interpret their actions and reactions effectively and, most importantly, to have the empathy for those we are asking to change.

Resistance to change is wired into the way we make sense of the world. In part, this is due to the unconscious nature of the way we adopt our beliefs and the relatively automatic nature of our day-to-day behavior. (Bargh and Chartrand, 1999; Sterman, 2002; Kahneman, 2011). Daniel Kahneman, the Nobel-prize winning psychologist, who, together with his partner Amos Tversky, inspired the field of behavioral economics, developed a foundational theory for understanding the automaticity of our behavior. According to Kahneman, we have two competing mental processes at work in our brains, which he calls “System One” (the automatic system) and “System Two” (the analytical
system) (Kahneman, 2011). Kahneman’s key insight was to recognize that System One is in control most of the time. He argued that analysis and critical reasoning expends (literal) energy and thus our System Two is lazy, clunky and slow, deferring whenever possible to the elegant meaning-making of System One. Additionally, this process happens without conscious awareness or consent (Sterman, 2002).

This dynamic leads to a kind of “stickiness” of behavior and beliefs that leads us to preserve them without needing any particularly compelling rationale, holding them like we might hold possessions (Ableson, 1986). Harvard researcher Ellen Langer has coined the term “premature cognitive commitment” to describe the phenomenon of locking in on a belief early in life that then becomes stuck because it was adopted without much conscious thought (Langer, 2010). In this way, we “freeze” on ideas and behaviors in order to get cognitive closure without a corresponding way of “unfreezing” in the presence of new information (Kruglanski and Webster, 1996). Broadening this phenomenon to an organizational context, Barbara Levitt and James March (1988) explain that organizations can also hold onto both behavioral and narrative ruts that hold firm even in the face of disconfirmation. For example, if a team believes they do extremely high-quality work, they might hold that belief even when they discover that the work has not produced the desired effect.

Equally important is the effect of people’s expectations, which play a substantial role in our experiences and thus our behavior and our openness to change (Ariely, 2008). Expectations serve as the filter through which we understand our experiences and even how we retroactively construct our past (Greenwald, 1980). We layer our expectations onto others, for example, assuming that those we identify with also share our beliefs and
perspectives (Nickerson, 1999). On teams, individuals’ perceptions of what a team is experiencing (and producing) can be highly influenced by their own prior experiences and their expectations and interpretations (Soule and Applegate, 2009). It is thus critical to understand and frame the expectations of various team members about what a shift in organizational structures and success metrics will mean for them. Absent a clear understanding about these expectations (and the narratives that accompany them), it is too easy to miss big chunks of information crucial for the success of the project.

These dynamics have enormous implications for change work. Because we adopt beliefs and behaviors unthinkingly (Gilbert, 1991), and we often behave differently in practice than we imagine ourselves to act in theory (Argyris, 1994), it may take substantial effort to disrupt our beliefs and behaviors. When broadened out to a team context, this means that if both individual and organizational routines are difficult to shift when made explicit, they would be almost impossible to shift if left implicit. Any change project, then, must start by making both current beliefs and behavioral routines explicit enough to be scrutinized and evaluated by the team before any change can take place.

The relationship between belief and behavioral routines sits at the heart of organizational culture. As organizational culture theorist and practitioner Edgar Schein writes, “Perhaps the most intriguing aspect of culture as a concept is that it points us to phenomena that are below the surface, that are powerful in their impact but invisible and to a considerable degree unconscious. In that sense, culture is to a group what personality…is to an individual” (Schein, 2004, p.8). Yet that does not mean that culture change is possible merely by exploring what is below the surface. Cook and Yanow (1993) write that any organizational learning requires a new situation or action - that it
cannot happen in the absence of a change in behavior. They write, “The focus here is less on what goes on inside the heads of individuals and more what goes on in the practices of the group” (p.385). This does not mean that beliefs do not affect culture, but that mindsets can often change internally only after we observe or participate in a shift externally.

III. Theory of Action

Out of this research, I have constructed the following Theory of Action:

If I:

1. help the TLA team reflect on their implicit beliefs about team success and articulate the behavioral norms that have evolved as a result,
2. lead the team to articulate shared goals for strong team performance,
3. create formal ties between measures of individual and team performance, and
4. guide the team through a set of teaming experiences to determine what works (and doesn’t) for the organization,

then the TLA team will:

1. adopt an updated narrative about organizational success that elevates the importance of team performance relative to individual output, and
2. embrace a more integrated set of working practices,

leading to:

an interdependent team able to coordinate effectively to improve quality and coherence in blended learning practice throughout the sector.
It must be said that while this Theory of Action outlines the frame for my set of activities with TLA, these actions could not be the work of just one person. Within each “I” it should be inferred that multiple (if not all) team members contributed significant effort and input. In particular, TLA’s Chief of Staff, Michela Marini, has been my close collaborator and “partner-in-crime” through the entire process and I would not have gotten nearly as far without her.
The Strategic Project

If you want to build a ship, don’t drum up people together to collect wood and don’t assign them tasks and work, but rather teach them to long for the endless immensity of the sea.

- Antoine de Saint-Exupéry

At the team retreat in April 2017, Dr. Rabbit explained, “The metaphor guiding our team has changed. Scott used to talk about us ‘snorkeling’ to better understand the ecosystem, but we are past that now. We are no longer individual snorkelers, we are now a team building a space station while we are flying it. We have to learn a new way of working together.” From August 2017 through March 2018, I worked with TLA’s members to develop and lead a collaborative human capital strategy to aid this transition.

Starting in the Summer and solidified in the Fall of 2017, Dr. Rabbitt, in conjunction with TLA’s Board, embarked on a formal strategic planning process to update and articulate TLA’s organizational strategy. Rather than stay predominantly in the realm of information gathering, packaging and disseminating, as it had done in the previous year and a half, TLA began to build on its deep pool of relationships to create and facilitate learning networks of and for leaders implementing blended learning initiatives in their districts.

This move was partially based on the team’s growing awareness that the same systemic challenges (including lack of capacity) that prevented districts from creating and sharing information also prevented them from using resources that organizations like TLA were producing. It was also based on a desire for the team to do more than simply be advocates for blended learning. “We believe technology has the capacity to enable important things in the classroom, especially in terms of creating more equitable
opportunities for kids across the country,” explained Dr. Rabbitt. “But our primary interest is helping to create the conditions where leaders and practitioners across the sector can learn from one-another, despite their constraints. Our job is to be an engine for the sector to build collective knowledge.”

To that end, TLA developed a plan to:

2. Bring blended learning leaders together to create robust and supportive communities of practice,

3. Create a space for the coordinated testing of new ideas (for classroom and school practices or for district approaches to implementation and scale) in different contexts,

4. Build evidence to support particularly successful innovations, and

5. Engage a set of diverse “agents” in the field to share resources and innovations that currently exist, but may not be fully utilized (Figure 6).

Figure 6: How TLA works across the field to drive system transformation (Rabbitt, B. Internal Communication)
These activities - convening practitioners and leaders, testing instructional practices, building evidence of value and transferability, and disseminating knowledge - could conceivably be treated as discrete projects managed by different TLA partners. Yet, in isolation they would simply be mimicking the system fragmentation TLA is aiming to help repair. Further, many pieces of this organizational strategy are functionally interdependent. Absent the testing network, the dissemination team has little to broadcast. Absent the identification of high-potential strategies (for example, specific ways teachers are making use of student data, etc.) the network has nothing to test. To offer one concrete example, TLA’s Learning Commons (an online platform where educators can find and share tips, advice, resources, and playlists to aid their implementation of blended learning) draws on content from organizational partnerships managed by the CDE team, from learning networks (managed by part of the R&D team), in collaboration with a technology partner (coordinated originally through Dr. Rabbitt).

Dr. Rabbitt acknowledges, however, that the organization was not designed with this kind of coordination in mind. She explains, “We tend to ask, “Who is doing X?” not “How are we all going to get to X?”’ Conversations with TLA partners reinforce this narrative. According to one, “TLA works like an ecosystem. We all have our different areas and Beth acts as a coach, investing in all of us.” Yet, “we don’t utilize each other as well as we could. Because we’re still working so independently, even if work is transparent, we can’t understand how all the pieces fit together...Sometimes it feels like we’re doing different pieces of the puzzle and then making them fit because of our funding streams.” Another team member mused, “Are we really collaborating, or are we just throwing our work at each other to make sure we don’t crash?”
I embarked on my project conscious of the trap that Heifetz and Laurie describe in their seminal article, “The Work of Leadership,” namely that leaders often apply technical fixes to deeper adaptive challenges to their detriment (Heifetz and Laurie, 1997). I believed that if we attempted to lay new working practices on top of current TLA routines and norms without understanding the motivating forces behind these interactions, I would accomplish little. This was especially true in light of the substantial increase in personnel over the course of my project. Just before I started at TLA, there were seven members of the team. By March 2018, the team numbered 12.

The heart of my challenge was to understand what team members cared about and to make sure that I was helping them define, swim in, and experiment with solutions to the challenges that they themselves felt. This was especially important given the different circumstances of either being new on the team or having a long institutional memory. Without a concerted effort to understand team members’ experience, it would be too easy for the historical solo-practitioner model to emerge as the default working style in a new context where both coordination and collaboration are now required. In particular, I wanted to understand what might enable even the most autonomous individuals on the team to value, and contribute to, a more integrated working structure.

The table below (Figure 7) offers a high-level look at the series of activities I performed, led by my Theory of Action. Instead of creating a fixed plan to be executed in set stages, I instead used a lean start-up process to guide my work. The heart of the lean start-up model is the insight that highly detailed plans rarely survive first contact with the real-world and that iteration in conversation with the end-user is a far more effective way
of meeting their needs (Blank, 2013). I knew that we would be learning as we implemented and that this learning would influence our next moves:

<table>
<thead>
<tr>
<th>If I…</th>
<th>Key Activities</th>
<th>Success Measures</th>
</tr>
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| Help the TLA team reflect on their implicit beliefs about team success and articulate the behavioral norms that have evolved as a result | - Conducted interviews with team members about their beliefs about team and organizational success  
- Developed a baseline catalogue of team practices and norms related to team performance  
- Launched a diagnostic survey on team practice and perceived results of that practice  
- Led quarterly sessions to enable team to reflect on different aspects of its working process | - Team members report a shift in ways of thinking about individual and team success  
- Team members reflect (unprompted) on causal relationship between team culture and organizational success  
- Team members can identify the extent to which past practices aid the new organizational strategy |
| Lead the team to articulate shared goals for strong team performance | - Facilitated working sessions to analyze diagnostic and set team goals for strong organizational success  
- Introduced team-focused goal-setting to bolster goals for external output | - Articulation of measurable goals for team success as it relates to organizational strategy  
- Team identifies focused areas to improve performance  
- Project leads adopt team-focused inquiry to improve internal coherence and coordination |
| Create formal ties between measures of individual and team performance | - Formalized a new set of team capabilities based on TLA core values  
- Updated bi-annual performance conversation framework (PCF) to tie individual goals to both organizational strategy and team success | - TLA formally adopts practices that tie individual performance evaluation and goal-setting to team and organizational success |
Guide the team through a set of teaming experiences to determine what works (and doesn’t) for the organization

- Tested new structures for improving knowledge transfer and collective goal setting during team meetings
- Tested a centralized system for tracking and updating ongoing projects to increase knowledge sharing
- Tested accountability partner system to offer TLA team members additional support for developing professional goals
- Tests developed with full team input
- Measures of test success set by most skeptical team members (to enable their voices to be heard)
- Tests lead to team to adopt new practices
- Team members report improvement in team collaboration and/or interdependence

Figure 7: Key activities and success metrics

If I...Help the team articulate implicit beliefs about team success and the working norms that have evolved as a result

Team Interviews

I first undertook a process to surface the dominant narratives and beliefs team members held (both implicit and explicit) about the value of TLA, what drives its culture and what it means to be successful on the team. Underlying this first step was the logic that organizational meaning-making and memory translates into routines, and these routines influence both culture and effectiveness (Levitt and March, 1988). They can also impede change when left unexamined. Levitt and March explain, for example, that sub-optimal organizational routines can be easily established, never re-examined, and then adopted unthinkingly by new team members, reinforcing a “competency trap” in low-level work (Levitt and March, 1988). To break that cycle, organizations must change the “givens” that govern their work. I believe that this is only possible if we understand what those “givens” are. Through a series of one-on-one interviews with team members,
reflection sessions with Dr. Rabbitt, informal observation during team meetings, and a survey conducted by TLA’s Chief of Staff on organizational culture, I developed a picture of both the explicit, “espoused” beliefs and values that drive organizational behavior (Argyris, 1994) and also some of the dominant implicit narratives, which prove just as powerful.

As an orienting task, I asked the six team members who had been part of the organization for longer than a year to tell me what they believed to be TLA’s value proposition in the education sector. While not directly a question about team process, I felt it was important to understand how different team members conceived of the organization’s value and thus what kinds of team process would ultimately enable the organization to succeed. This was also a way to better understand the culture of the organization by listening to what aspects of TLA’s work different team members emphasized and what drew out their feelings of pride.

While there was some variation in responses, several themes ran through these conversations. The first was that, as one partner put it, “TLA tackles the challenge of poor knowledge transfer in the sector.” A number of team members named specific pieces of their work, such as TLA’s Blended and Personalized Learning at Work site, which catalogues blended learning practices in classrooms across the country. Others spoke about the value of “easy to digest” models or the importance of capturing and sharing what they called “best practices.” In general, all team members felt an inherent value in activities that serve to break down silos in the sector and speed up knowledge sharing of blended learning practices. The value partners placed on knowledge sharing and breaking down silos was notable, since these are the very practices the organization
was looking to improve internally. These conversations illuminated a potential opening for our teaming work, by referencing the significance of these practices in the sector more broadly.

Another value mentioned by a majority of members was the value of being an “ecosystem connector.” One partner explained, “We create the connective tissue between organizations in this space. We help the organizations in the blended learning ecosystem develop a shared vision for what we’re trying to achieve together.” Another team member cited particular networking activities (such as convenings the organization had hosted) as key sources of organizational value. Somewhat related, two partners also mentioned TLA’s role as a mentor organization that other technical service providers and district leaders could turn to for support and advice. “We are a coach in the blended learning space,” explained one partner. “We know who plays what position well and can guide them in the right places.” Notably, few of these expressions of value mentioned interdependence on the TLA team. Team members primarily spoke about the aggregate effect of many individual pieces of work.

Dr. Rabbitt’s description of TLA’s strategy, however, focuses far more on collaborative than individual activities, explaining that ecosystem acceleration cannot be done without both internal and external coordination. “I hate the term ‘best practices,’” she wrote to me, “I want us to focus on making strategies available for testing and adaptation to solve problems and generate evidence.” According to Rabbitt,

There is significant investment in developing new, student-centered and technology-enabled approaches to schooling and a proliferation of new innovations and direct investors. There is also significant small-scale, grassroots R&D underway in districts across the country. Yet there is no real bridge between innovation on the fringe of the sector and mainstream practice.
Dr. Rabbitt calls this the “problem in the middle” and explains that TLA’s key value is to help bridge this gap (Figure 8).

![Diagram](image)

**Figure 8: Tackling the “problem in the middle”: Taking innovations to scale (Rabbitt, B., Internal Communication)**

In order to do this successfully, she argues, the team must embark on a series of integrated and mutually reinforcing activities. In summary, while the team seemed to be in agreement overall about the types of activities in which they should be engaged, there was room for the team to cohere in terms of what they should do to make these activities mutually reinforcing or why that would be necessary in the first place.

The expressions above focus on the organization’s impact on the sector, but there are also beliefs that focus internally, on the team and their behavior towards each other and those with whom they work. In order to understand these beliefs, I traced how formal team values expressed themselves in the team’s day-to-day work, conducted interviews to
understand how team members define individual and team success at TLA, and analyzed the team culture survey, distributed by the Chief of Staff in August 2017.

TLA members have devoted time and energy to articulating a set of espoused values and have published them in a Team Value Statement and Culture Handbook (Appendix I) to which all team members (during the time of its creation) contributed and pledged agreement. The handbook includes the set of values, how each value should express itself in behavioral norms, and what actions the organization will take to operationalize each (Figure 9).

**TLA’S CORE VALUES:**
As a team, we commit to applying the following values internally and externally in our work:

- Kids First
- Urgency
- Equity
- Bold Ideas and Action
- Collective Intelligence and Impact
- Accountability
- Continuous Improvement and Persistence
- Honesty, Trust, Respect
- Fun and Flexibility

*Figure 9: TLA’s Official Core Values*

To take one example, part of the team’s definition of the value Urgency includes “We are proactive and have a bias toward action, and we take initiative for coming prepared and moving work forward through responsiveness and follow-through.” An operational action to bring this value to life is, “Commit to specific, time-bound horizons for our work…by operating in phases focused on shorter-term, but ambitious goals…” Behavioral norms include, “Aspire to a 24hr response time for email, externally and internally…which could include a simple acknowledgement of receipt of the message.”
The creation of this handbook was driven by Michela Marini, who leads the organization’s culture work, but is remarkably present in TLA’s working life. Members cite these values frequently in team conversations (for example, “How will this project promote our value of urgency if we don’t have an end-date in mind?”) New team members are asked to both read and commit to the values, and are invited to contribute ideas to make them more robust. Even the organizational “swag” (objects like t-shirts and postcards printed with the organizational branding) state TLA values (for example, “Kids First” or “Catalyst”). It is fair to say that TLA members hold these values with authentic pride and that they serve as a driving force for engaging in work that can often feel distant from the students the organization was created to serve.

Given the importance these values hold, it is worth examining what role, if any, interdependence plays within them. One of TLA’s core values, Collective Intelligence and Impact is the nearest neighbor, although its definition (starting with: “We don’t “own” the solution or the capacity to produce the change we seek; we are betting on the power of many organizations and people-- including teachers, students, and families--working together to transform education”) focuses more on sector than team. Still, under this value is a written acknowledgement that “our success is connected and we share credit.” Interviews with TLA team members reinforce this value. As one team member reflected, “To succeed at TLA you really have to try to be egoless. You’re a more successful TLAer the less competitive you are within the organization. We are all supporting each other. There’s nothing to compete for.”

There are other allusions to working together including, under the value Accountability, that “We take responsibility individually and as a team for delivering
results and meeting the commitments we make” and, under Continuous Improvement and Persistence, that “We are not afraid to ask for help when we need it, or to ask questions. We share with others and are each other’s mentors.” At the same time, there is no stated commitment to the kind of team interdependence that Dr. Rabbitt suggests her strategic plan requires. The values as written could quite comfortably fit a team that operates as a group of individual practitioners.

Team interviews also drew out competing commitments. According to one team member, “You have to trust your colleagues and that they are getting their work done. Assume positive intent and assume they share your passion for the work...To be successful you have to believe in others, even if you don’t always know what they’re doing.” This person expected infrequent collaboration and thus saw “faith” as a critical piece of team success. In contrast, another (newer) team member explained,

There’s a lot of collaboration going on and [to be successful] you have to be a kindred spirit to collaboration. Taking the time to loop team members in. Even in the past two weeks with all these challenges coming up, it's so much more effective if we talk about it on an ongoing basis. Collective knowledge making things better. That works so much more efficiently than trying to solve it on your own. If you prioritize getting their opinion, it makes life easier.

Diagnostic of Organizational Practices

Peter Drucker (1992) wrote that the key job of teams in a knowledge economy is “the integration of specialized knowledge into a common task” (p.95). If we accept this charge, then identifying team beliefs is insufficient to make progress towards interdependence. We must also define the working structures that arose as a result of these narratives and that support or hinder integration of individual skills and knowledge towards accomplishing organizational goals. Rooted in my survey of research into
effective team practice, I aimed to understand the extent to which TLA’s working structures, processes and norms modeled those of high-functioning, collaborative teams.

In order to perform a methodical diagnostic, I wanted to use a structured framework to guide my investigation. There was, however, no single framework I believed to be sufficient: Hackman and Wageman’s (2008) focus on structures was helpful, but lacked the learning imperative (as well as the dynamism) highlighted by Edmondson (2012) and Kegan & Lahey (2016). Lencioni (2002) (influenced, perhaps by theorists like Chris Argyris), added insight about why letting go of defensive mechanisms is vital for team success. Other writers added powerful, insights - such as Katzenbach and Smith’s (1993) focus on shared work. In order to do a thorough diagnostic, I built a new framework for my work that highlighted areas of overlap I had uncovered earlier between the different theories on teaming and organizational effectiveness (Figure 10):

The framework highlights the foundational nature of both psychological safety (as

![Figure 10: Organizational structures that promote integrated performance and growth](image-url)
demonstrated by a culture that supports risk-taking and vulnerability) and a clear direction (what Hackman would call “The mountain we are climbing together”). But it also then offers four categories of structures that support integrations between individual and team performance:

- **Defined Sandbox** (“We know the boundaries of our roles, what decisions we are empowered to make, what tasks each of us should be working on and what it looks like to be done.”)

- **Accountability Structures** (“We can clearly articulate metrics of success and our work is transparent enough that we can keep track as we go.”)

- **Learning Systems** (“We have systems for ongoing feedback, professional learning, idea sharing and team reflection. We challenge ourselves to learn and grow.”)

- **Systems for Working Together** (“We have explicitly articulated our norms and expectations and systematically share information. We have shared work products, not just individual ones.”)

**Appendix II** lays out the elements of this framework in greater detail. Articulating this framework also allowed me to think through what we might observe in the absence of these structures (*Figure 11*).
In order to compare TLA against these various structures, I conducted a number of data collections. First, I interviewed members of the team about various pieces of the framework. The questions I posed during these interviews were inspired by Richard Hackman’s insight that there is a strong relationship between what I have identified as one’s “sandbox” (the lines that delineate our roles, tasks and decision-making authority) and a team’s overall effectiveness. In particular, he explains that teams do well when leaders express where a team is going, but the team has decision-rights over the means by which they get there (Hackman, 2004). The Team Diagnostic Survey (TDS) developed by Hackman, Wageman and Lehman (2004) also dedicates a section to this distinction. I therefore focused attention on this ends/means distinction and how team members understood the bounds of their decision-making authority (see Appendix III for interview protocol and breakdown of the different kinds of decisions we covered).
I also distributed an anonymous survey ([Appendix IV](#)) to gather more comprehensive data regarding team practices and attitudes regarding collaboration and interdependence. Much of this instrument was adapted from the TDS, but I also included questions on team reflection from Garvin, Edmondson and Gino (2008), questions a colleague and I adapted from Kegan and Lahey (2016) about individual growth and several questions from Lencioni (2002) on team dynamics. The aim of this survey was both to triangulate data from observations and interviews and also to get a more comprehensive overview of where the team generally felt confident and clear and where they had questions.

Finally, I also used observational data that came from everyday practices of the team. I worked with Michela Marini to catalogue the various official TLA team processes in the context of the framework, above. This helped us understand where energy and effort had already been put into place as well as give us a sense of the impact or value of these different practices. I also went through the agendas for each of the full-team meetings we had held since my arrival in July 2017 and coded each agenda item into one of four categories:

- Reporting/Information Sharing
- Discussing (e.g. ideas of interest)
- Decision-making
- Problem-solving

The aim of this investigation was not to pass judgment on our use of time, but rather to level-set our understanding about how we made use of our full-team time to ensure that it aligned with our organizational needs.
If I... Lead the team to articulate shared goals for strong team performance

Our next step was to play back the results of the team diagnostic so that the team could reflect together and set goals for future work. We synthesized our findings and presented them to the team in early December. We used the framework I had developed to shape the conversation, walking the team through the results of our interviews, survey and observational data capture. See Appendix V for the full presentation.

What we presented served as the foundation for goal setting with the team. We highlighted the strength of the team’s foundation - that people reported high levels of psychological safety and high levels of dedication to a compelling and challenging organizational mission. Another strength the diagnostic reflected was general clarity on the team about roles and tasks. Team members felt that they knew what value they added to the team and felt appreciated for their contributions. At the same time, team members also expressed a need for more clarity about what the organizational goals were and how they would be measured. The diagnostic showed that team members were also interested in developing clearer systems for information-sharing, decision-making and feedback (Figures 12 and 13).
Figure 12: Key areas of strength identified by the TLA team

Figure 13: Key areas of growth to develop identified by the TLA team
Out of this conversation, we set the following goals for the team (Figure 14):

![Figure 14: TLA’s team goals for organizational development](image)

It is important to note that one thing we did not do as part of this process was to create a team definition of what a “strong, interdependent team” means for TLA. Instead, I used the diagnostic framework as a starting point to discuss goals. I will explore this later in my analysis, but I believe this could have been an opportunity to garner more ownership and engagement had we created that definition together.

*If I... Create formal ties between measures of individual and team performance*

Dr. Rabbitt and I felt that we had a unique opportunity to codify the espoused values of the team into a more formal set of team competencies that could serve as a benchmark for team and also individual performance. This was also a step towards clarifying team goals because it allowed each team member to track what elements of their own, individual performance would be directly valuable to the growth of the team.
overall. It would also serve as a set of metrics against which to evaluate team growth, strengths, and weak areas.

The term “competency” has been defined in a number of ways from an “underlying characteristic of an individual that is... related to superior performance in a job” (Boyatzis, 2007) to “skills, abilities, and personal characteristics” that are directly observable (Chouhan and Srivastava, 2014). Because the aim in defining competencies at TLA was to help team members identify areas of development they could explicitly track over time, we chose a definition that highlighted visible behaviors and skills:

Competencies are observable skills, behaviors, and attributes that help people succeed in their work at TLA and, ultimately, lead to organizational success. The competencies are the expression of what TLA means by “high quality performance.”

As my aim was to capture the essence of the TLA team in its strongest form, I therefore anchored the competencies on the TLA Values as my system for classification. By working to understand the competencies that could support these values, we could enable both consistency in the language of individual goal-setting and also tighten the relationship between individual and team. (See Appendix VI for list of competencies.)

Once the first draft was created, I brought the team together to examine our performance relative to these competencies (Appendix VII). Each team member identified areas of strength, weakness and also competencies they felt were “mission critical.” This discussion enabled us to hold a mirror up against ourselves in terms of where the team was strong and well-integrated and where we needed development. The process surfaced that the team felt its strongest competencies were those areas that supported individual performance, for example: taking initiative, communicating persuasively, responsiveness and credibly leveraging expertise. Those team members
identified as weakest were more closely tied to working together, such as seeking feedback, working with transparency, being equity driven, and collaborating. Team members also noticed that some areas of strength, for example leveraging expertise, were not listed by team members as mission critical, while others listed as areas of weakness, like collaborating or being equity driven, were identified by at least half the team as critical. Finally, the team puzzled through the fact that the majority of the team had listed think strategically as mission critical, but that team members listed it as neither a strength or weakness. One team member stated, “I don’t feel like we have a lot of strategy discussions, individually or as a team. Occasionally we bring strategy up but it does not seem prioritized. I don’t necessarily see a connection between our strategy for the next couple of years and our mission.”

I revised the competencies based on feedback from the team and then used them in the redesign of our bi-yearly Performance Conversation Framework (PCF). The TLA performance review had traditionally been a time for team members to individually set goals, check progress against past ones, and have an open conversation with the CEO, but it did not touch explicitly on ways that individuals were contributing to overall team effectiveness. I wanted to keep the open, warm dynamic of the performance review while more actively tying individual goal setting to team performance. By using the newly developed competencies, individuals could ensure that they were developing skills that were relevant to team performance. In order to accomplish this, I made the following updates:

- Tied individual strategic goals to global organizational goals
• Offered a new frame for setting personal goals that invited team members to reflect on the competencies they wanted to develop

• Added a new goal category focused exclusively on the individual’s contribution to team success

This new PCF was piloted in the Fall of 2017, after which we collected feedback from all members of the team about the changes and the impact they had on the quality of the conversation.

If I… Guide the team through a set of teaming experiences to determine what works (and doesn’t) for the organization

The next phase of work was to take the goals the team had identified and create a set of tests for new processes or structures the team could experience and give us feedback about. We wanted to strike a balance between making changes that were disruptive enough to be useful tests of new working processes, but not so disruptive as to feel overwhelming or hindering to the team’s work. We designed five prototype ideas to enhance mutual accountability, knowledge sharing, and decision-making on the team. After the initial design, we convened team members in small groups in the months of December and January to give us feedback and enhance the ideas. We asked groups:

• What would have to be true for this idea to have high value to you?

• What would a successful test of this idea look like to you?

I crafted these questions to deliberately steer the conversations away from a yes/no paradigm (“I like it” or “I don’t like it”), but instead to have a conversation that would enable us to create systems that team members themselves had a hand in designing. We
also provided space for team members to say which ideas had no value to them, although this proved rare.

Based on the small group design sessions, we presented three new systems to test at the beginning of February. These included:

- **Project Map.** A central repository of all key team projects that provided concise information about who the project lead was, project milestones, who would be involved, projected timeframe, and connection to the organizational strategy. This project map also created a centralized space for short project updates so that all members of the team could track the progress of different projects over time. More importantly, the regular updating structure aimed to provide a venue for team members to see areas of overlap between their projects and see opportunities for collaboration or integration of activities.

- **Pre-Project Toolkit.** This toolkit clarifies guidelines for launching and communicating about new projects. The toolkit includes a set of unified expectations for what project leads will make available to the rest of the team (e.g. a one-pager that gives an overview of the project, its milestones, and its timelines) as well as a set of optional tools to help project leads clarify decision-making structures and set project goals (e.g. a protocol for a Before Action Review and a framework for determining project goals and metrics). This toolkit was a first step in creating a coherent process for team communication about projects and also for bolstering general team knowledge management. The focus on consistent information sharing and reflective goal setting are not ends in and of themselves, but serve as the opening stages of what Jarzabkowski et al. (2012) call
“coordinating as dynamic social practice” (p.907). The aim is to make implicit thoughts, needs and expectations explicit to avoid the emotional distancing or disappointment that can accompany clashing expectations. As Hinds and Bailey (2003) remind us, this is a particular danger for distributed teams.

- **Accountability Partners.** Two pairs of TLA team members launched a test of a new accountability partner system to offer a more formal structure to solicit feedback and support for personal and professional goals. This system tested the hypothesis that if team members are actively responsible for the growth of others, in addition to their own, it could have spillover effects across the team – even for people who are not formal partners. This test encompassed a six-week period of three sessions, which included a set protocol (Appendix VIII) to keep the test as consistent as possible.

In addition to these three tests, we have also convened, at Dr. Rabbitt’s request, a small group to redesign our full-team meetings, which began launching tests of new meeting structures in early March 2018. This team is exploring what it is the team ought to be doing on a regular basis and will propose possible structures for achieving it. The aim with this redesign is to make sure that the team is not just “going through the motions” by reporting out to one-another, but that all members are adding value to one-another’s work and that the team is working as effectively as possible.
Evidence of Change

What is the evidence of the impact of my Theory of Action and the results of the steps I took? According to the plan I laid out, I was looking to fundamentally do two things (my “then” statements):

1. Help the TLA team develop an organizational narrative that shifted the team’s understanding of “high performance” from a focus on individual output to focus on team-based output.
2. Guide the team to adopt a more integrated set of working practices that enabled interdependent work.

Both of these objectives served to help the team activate a new strategy that called for interdependent work streams and knowledge sharing. To that end, there has been some strong evidence of change and also a great deal of work left to be done for these changes to show visible impact on TLA’s work in the field. The table below summarizes the key evidence of change (Figure 15).
<table>
<thead>
<tr>
<th>If I…</th>
<th>Goals We Set</th>
<th>What Actually Happened</th>
<th>Progress to Date</th>
<th>Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help the team articulate implicit beliefs about team success and the working norms that have evolved as a result</td>
<td>Team members report a shift in ways of thinking about individual and team success</td>
<td>Direct conversations about what implicit beliefs might be driving working practices</td>
<td>Launch post-survey to measure change in beliefs about team success and what has caused (or impeded) change</td>
<td>Engage in a direct conversation with team about the impact of culture on team performance</td>
</tr>
<tr>
<td></td>
<td>Team members reflect (unprompted) on causal relationship between team culture and organizational success</td>
<td>Clear articulation of strengths and weaknesses of working norms on team effectiveness</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Team members can identify the extent to which past practices aid the new organizational strategy</td>
<td>Unprompted team reflections on the influence of TLA 1.0 on team integration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lead the team to articulate shared goals for strong team performance</td>
<td>Articulation of measurable goals for team success as it relates to organizational strategy</td>
<td>Sub-teams have articulated impact goals that align with organizational strategy</td>
<td>Align team around organizational goals that align with strategic plan</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Team identifies focused areas to improve performance</td>
<td>Team has focused on knowledge sharing, mutual accountability and decision-making as areas of focus for team development</td>
<td>Prioritize subset of metrics that team can use to independently track progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Project leads adopt team-focused inquiry to improve internal coherence and coordination</td>
<td>Unprompted use of Before Action Review on sub-teams to improve team coherence and coordination</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goals We Set</td>
<td>What Actually Happened</td>
<td>Progress to Date</td>
<td>Next Steps</td>
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<tr>
<td>----------------------------------------------------------------------------</td>
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<td>---------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Create formal ties between measures of individual and team performance</td>
<td>TLA formally adopts practices that tie individual performance evaluation and goal-setting to team and organizational success</td>
<td>New TLA competencies created and vetted by team</td>
<td>Align team goals with goals set during individual PCF conversations</td>
<td></td>
</tr>
<tr>
<td>Guide the team through small tests of interdependent teaming to determine what works (and doesn’t) for the team</td>
<td>Tests developed with full team input Measures of test success set by most skeptical team members (to enable their voices to be heard) Tests lead to team to adopt new practices Team members report improvement in team collaboration and/or interdependence</td>
<td>Four tests currently in process for increasing mutual accountability, team knowledge sharing and clearer decision-making structures New sub-team launched to re-design team meeting structures Measures of test success have integrated full team input and have been set by those who have articulated the highest bars</td>
<td>Evaluate tests and use feedback to determine which processes to establish more permanently Tie team meeting redesign to larger human capital strategy</td>
<td></td>
</tr>
<tr>
<td>Then the TLA team will...</td>
<td>Adopt an updated narrative about organizational success that elevates the importance of team performance Increased 1:1 conversations surfacing different models of team success Some (healthy)</td>
<td>Use conflict as the springboard to talk directly about how to leverage diversity on the team</td>
<td></td>
<td></td>
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</tbody>
</table>
Organizational change is slow, incremental work. People do not change their habits easily, and, as Kahneman (2011) reminds us, for understandable reasons. We have only so much brainpower to dedicate to non-automatic actions if we want to be capable of living our day-to-day lives. Yet there have been a number of small shifts that indicate momentum forward in terms of our organizational change work at TLA. Over the past three months, various members of the TLA team have voluntarily started using several new tools I introduced that aim to increase team interdependence. Two team members voluntarily used the competencies we developed as the foundation for their bi-annual performance review. Their feedback was so positive (they both said it enabled them to focus on developing areas they knew would have value to the team), that we have now altered questions in the PCF to directly include TLA competencies.

The use of a Before Action Review (BAR) has also filtered through the team on a voluntary basis. I used this tool with one team member as we launched a collaboration together and then she, in turn, used it when she launched a new project several months later. Two team members then requested that we bring the use of a BAR to the more long-standing R&D sub-team, which encompasses more than half of TLA. The language
used when team members made this request was particularly informative. “It’s a good opportunity for us to take a step back and do some reflective work about what it means to be on this team. I’m not sure we’ve taken the opportunity to work that through, yet.” A different team member expressed to me, “Not only did the BAR make me more invested in the team, but it made me more invested in the individual goals of other members of the team.”

It is also notable that the team has engaged with the various team process tests we are running even if they are unsure what the outcome will be. Given the value the TLA team attributes to flexibility and autonomy, the adoption of these tools and structures shows a growing willingness to also prioritize knowledge sharing and reflexivity for the purpose of collaborating more effectively. Particularly notable has been the team’s approach to creating an accountability partner system within the organization, to formalize individual goal-setting, and also to institutionalize the notion that team members are responsible for one-another’s success. The team members who tested this structure all reported that it would be beneficial to institute throughout the organization. One explained, “I think everyone should do this. It gave me a chance to address priorities that are important, but not urgent. If I had had these conversations a year ago, I think I would have been a better team-mate and produced better work.”

There has also been a subtler, but equally important, shift in the language different team members use when describing the value of collaborative and reflexive activity and also in the way they elect to share information. One team member who offered me a number of cautions at the start of my project (e.g. “Really, how much time can we spend on things that take us directly away from our work?”) recently mused that
she felt optimistic that we were communicating new and valuable information to each other. She explained, “This is so new for our team. We never did any of this work before this past year and so, even though it’s a bit overwhelming, it’s clearly valuable.” Other team members have started to make deliberate links to organizational strategy and team goals when making presentations about their individual projects, and have called out how others on the team can get involved, rather than simply reporting out on their plan or their accomplishments.

Also, though not a direct causal relationship, there is a strong correlational connection between the launch of my project and the priorities that Dr. Rabbitt has shared with the team. Over the past three months, Dr. Rabbitt has re-activated an internal data team to work on organizational metrics of success, requested the launch of a temporary team to make recommendations about how we might better utilize our team meetings to build better team integration and effectiveness, and has prioritized helping TLA sub-teams develop clear team strategies. While certainly not solely a result of my strategic project, there is a growing feeling on the team that it makes sense to spend time investing in team process.

Finally, there is an observational piece of evidence that the team is becoming more integrated. This is that I am witnessing more conflict on the team than I did when I joined. While it may seem counterintuitive that conflict would be evidence of successful collaboration, I believe heightened conflict shows evidence that people are simply working together more. TLA is a remarkably low-conflict organization with strong personal connections and a generally welcoming and energetic affect. Yet team self-assessments have revealed general tendencies to avoid conflict and/or accommodate and
compromise, rather than compete or collaborate. As some team members have speculated, these may be related and also amplified by a team culture that promoted autonomous work. As one team member mused, “I wonder if our tendency to avoid is in part a reflection of our early work because we didn’t have to collaborate very much?” While it is not always easy or appropriate to foster conflict, it can naturally arise when different personalities are tasked with doing work together. In the case of TLA, it may serve as a springboard for even deeper, more meaningful collaborative relationships.

Revisiting more directly the success metrics that I articulated earlier we have made some solid progress (*Figure 16*)

<table>
<thead>
<tr>
<th>Success Metric</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team members have an opportunity to access previously implicit values and beliefs about team success</td>
<td>This has happened sporadically, but we have not talked about implicit beliefs in an integrated way as a team</td>
</tr>
<tr>
<td>Team members report shift in ways of thinking about individual and team success</td>
<td>This has happened informally and in different ways for different people</td>
</tr>
<tr>
<td>Team members reflect (unprompted) on relationship between organizational culture and working norms</td>
<td>Again, this has happened individually and informally</td>
</tr>
<tr>
<td>Articulation of measurable goals for team success as it relates to organizational strategy</td>
<td>Sub-teams have created goals and Dr. Rabbitt has articulated organizational goals. Team has not yet fully aligned around metrics of success (i.e. “how will we know if we have accomplished our goals?”)</td>
</tr>
<tr>
<td>Team identifies focused areas to improve</td>
<td>Yes – team identified three core areas of focus</td>
</tr>
<tr>
<td>Spontaneous use of reflective tools</td>
<td>Yes, although not universally</td>
</tr>
<tr>
<td>TLA adopts formal practices that tie individual performance evaluation and goal-setting to team and organizational success</td>
<td>Yes – team has adopted new competencies and PCF process</td>
</tr>
<tr>
<td>Tests developed with full team input</td>
<td>Yes</td>
</tr>
<tr>
<td>Measures of test success set by most skeptical team members (to enable their voices to be heard)</td>
<td>Yes</td>
</tr>
<tr>
<td>Tests lead the team to adopt new practices</td>
<td>Not yet clear what processes will stick</td>
</tr>
<tr>
<td>Team members report improvement in team collaboration and/or interdependence</td>
<td>Sporadically, although not coherently</td>
</tr>
</tbody>
</table>

*Figure 16: Progress against metrics. Key: Green = significant progress, yellow = some progress, red = beginning or not yet started*
In general, the metrics that we have only partially hit are ones that require the team to come to a place of shared clarity (e.g. setting shared team goals, reflecting on implicit beliefs about team success, etc.). Up to now, much of this evidence has been case by case, with some team members fully engaged and others less so. We have not yet come to a place of shared commitment about team structures and process because we are still in a testing phase, but meaningful adoption of new practices would ultimately demonstrate evidence of change.
Analysis: Why Did What Happened Happen?

System change, even in small systems like start-up organizations, is full of complexity and interwoven factors. Thus, it is not always easy to tease apart causality, especially as we hold a vested interest in our own success to have a positive impact for people and a sector we care for deeply. Acknowledging this handicap, there is still value in making the effort so that we can strengthen our leadership skills for future work. In the same way that reflexivity correlates strongly with team effectiveness, so does it promote effective leadership (Kegan and Lahey, 2009). Leaders inevitably find ways to impede their own progress, but the outcome is not all or nothing. While I can see a number of things I would have done differently, I am also proud of my contribution to our success at TLA.

Personal Contributions to Change and to Challenge

Success: Leading from Genuine Need. Throughout my time at TLA, I insisted that my project be guided by genuine team need and that any solutions would address real, felt challenges. I did not come to a quick determination about what the team “needed” and then proceed to recommend changes. Instead, at each stage of the process, I asked team members to talk me through their experiences, contribute to the process, and offer feedback on the recommendations. These were deliberate actions, based on my belief that when people feel they are being asked to participate in a structure they had nothing to do with creating, they will not actively engage. This belief was drawn from experience, but also strongly influenced by design thinking and by what I was learning from the blended learning movement itself. As design thinking has spread through the business and
education world, one of its key contributions is the insight that all good design must come from deep user understanding. Designers must have the capacity to empathize with the needs of those they are designing for, and leaders are no exception.

Insights from district leaders I have met in the field have also strengthened this belief. In districts like Greeley-Evans, CO or Henry County, GA, for example, leaders in the central office have cultivated expertise in facilitating school redesign by helping individual schools set their own goals to match their unique needs. They have not layered on a pre-fabricated model for schools to emulate. The result is higher engagement. In Henry County, for example, leaders shared that there are more schools applying to participate in the change process than the district has capacity to manage at one time. I witnessed some similar excitement on the TLA team when we focused on issues team members had personally identified as meaningful. One team member, who had requested a more coherent system to track work, not only expressed excitement over having been heard, “I’m really happy we are taking active steps to share this information,” but also volunteered to help build the system. Another team member told me, “these are conversations I’ve been trying to get the team to have for six months.”

Taking another page from design thinking, another contribution to success was understanding the importance of identifying “unmet needs” in addition to those that team members articulated explicitly (Brown, 2011). Unmet needs are not always overt and clear, even to those who have them, but can be uncovered through careful questioning, listening and observation. For example, one team member told me early that “All I really want is to be left alone to do my work.” And yet, I observed her frequently volunteering to help with team-related projects. Further conversations clarified that what she really
wanted was to know the bounds of her decision-making authority. Another team member told me that she did not want to take on a leadership role for a particular project, yet came alive with energy and creative ideas when given the opportunity. I believe that taking the time to hear the “music” playing under the dialogue helped me to make a more accurate diagnosis and lead the development of genuinely valuable new team processes.

Another thing that I believe contributed to success was creating prototypes that team members could experience, rather than simply talking about changes on a theoretical level. As I will explain below, I believe that I could have started this much earlier to garner more team support. On a highly action-oriented team, offering tangible experiences (such as the revised performance evaluation) gave us concrete things to talk about and grounded reflection in practice.

**Success: Collaborative Partnership.** Partnering closely with TLA’s Chief of Staff, Michela Marini, was one of the best decisions I made during my residency. From the outset, I knew she would be a key stakeholder in the project, because she had led the team’s culture work and would continue to do so in the future. I made the choice to work with her as a full partner, rather than simply keep her “informed.” This meant that we worked together to perform the diagnostic, talked through our analysis and co-presented on our findings. We met at least weekly to discuss our various projects but also to share insights from the fields of education, design, and organizational change. Not only did her active involvement make the project more effective, but her support lent credibility to the effort and offered context for why the work was important. It has also meant that, as I move to wrap up the next phase of work, TLA will have deeply embedded structures and
internal knowledge to continue the work into the future. On a personal note, her partnership also offered me joy and propelled me forward, for which I feel no small measure of gratitude.

Our partnership also served as a valuable microcosm for what, I believe, makes collaborations effective. We started our work together by articulating clear goals, both for the project and also for the partnership. Each of us explained what success would mean to us and why and we also made direct requests that the other give us targeted feedback in areas we felt we needed support. Because directness and openness was something we both valued, we set a goal that we would manage at least one conflict directly within the first 2-3 months. This became somewhat of a joke between us when none occurred in the first few weeks, but setting that goal ultimately led to us managing a conflict together when one did arise. This has increased our mutual trust enough that I was recently able to send her fairly sizable feedback on a meeting agenda she distributed (which could have led her to feel unappreciated or stressed) and her response was, “I LOVE this idea…talk on Monday so I can hear your point better?” This example serves as a nice illustration of Amy Edmondson’s insistence that psychological safety emerges, in part, from the freedom to speak our minds (Edmondson, 1999).

It also points to a challenge the TLA team as a whole continues to face, which is balancing the warm “familial” feeling of the team with the fear that being too direct about conflict might rock the boat. “I don’t feel right criticizing others,” admitted one of the younger members of the team, “I just wouldn’t want to be the one to make things uncomfortable. I’d rather just deal with the issue myself.” Yet, a different junior team member recently overcame his nervousness about engaging in conflict and gave me direct
feedback during one of our one-on-one meetings. Not only did it not cause conflict, it deepened our interpersonal relationship and, most importantly, made my work better. The connection between effective collaborative work and direct feedback is advancing slowly but steadily on the team.

**Challenge: The Importance of “Small Wins.”** Debra Meyerson, who has coined the term “tempered radical” to describe people who can successfully effect change from within an organization, highlights the importance of early, small wins (Meyerson, 2001). That is, she advocates for taking on “a limited, doable project that results in something concrete and visible.” The Learning Accelerator is a team that puts very high value on small wins. TLA team members view themselves as individuals whose value lies, at least in part, in their ability to produce high-quality content on an ongoing basis. While reflecting on what success means at TLA, for example, one person explained, “My interpretation [of those who do less well on the team] is production oriented. We care about creating stuff that is meaningful to our audience.” Another remarked how quick production is “a source of social capital.” In early conversations, Dr. Rabbitt made sure to tell me, “Our team generally shares a desire for tangible work product.”

Yet my own inclination is towards reflection and analysis, traits which do not always match a culture of urgency. At the start of my time at TLA, I was new to the blended learning space and so I took time to bring myself up to speed so that I could ground myself in the new context of the organization and also of this new area of the sector. By holding back as I gained expertise, I did not set myself up quickly as someone with tangible value. This also became apparent in the moments that I recommended the
team slow itself down for the purpose of building in more reflection. Because I had not established myself as someone who understood the importance of fast output, it was harder to gain credibility to ask people to step out of their comfort zones.

In a conversation with Dr. Rabbitt about team process, for example, I advocated for lengthening the time of a subgroup meeting to include more conversation focused on goal-setting. Dr. Rabbitt’s (partly joking) response, “doing work to do work isn’t really doing work” revealed our different priorities. Her worry aptly surfaced an assumption many team members hold, which is that that focusing on the team, rather than the work the team produces, creates drag. The key lesson for me was the importance of understanding what it means to build credibility in one’s local context, as well as to have the ability to understand what allows others (especially those with different workstyles) to feel heard and motivated. Had I found ways to establish small wins early, I might have had more informal authority to ask the team to take bigger leaps later in the process.

**Challenge: Balancing Comprehensiveness with Clarity.** Upon reflection, I suspect that by trying to create a “unified” theory of team development, I ended up dispersing my time and energy and, even more importantly, the message I offered to the team. I asked the team to contribute to and reflect on their team competencies, surveyed them about team processes and structures for things like accountability and feedback, interviewed team members about decision-making structures, and nudged the team to create more actionable goals. While all these activities are related, they could also each prove meaty enough fodder for a 10-month project. Because we looked at team integration in so many different ways, the overall effect may have been a dilution of meaning. Team members
talk about “our culture work” in somewhat general ways and some have expressed a feeling that we are, “navel gazing and finding a lot of crud. It can be a little overwhelming to process.”

This was, perhaps, a result of the way I embraced my own exploration and learning. Not only was I attempting difficult work on the fly, but I was eager to share my learning as I went, possibly creating an impression that this internal teamwork had no clear purpose beyond a vague idea of, “collaborating better.” While I had worked hard to continually show the relationship between team interdependencies and higher effectiveness, I did not drill this down into tangible drivers of that effectiveness. A narrower focus may have meant that members of the team would be better able to articulate a nuanced team purpose, rather than taking it on faith. Ironically, one of the key elements of team integration that I have promoted is the notion of shared work, and yet much of the work of my own project was something I did either on my own or in tandem with the Chief of Staff. In this way, while we have made some good progress, there is still work to do to transfer responsibility and ownership of teaming structures to the team itself.

*Challenge: The Pull to Mirror Team Culture.* Peter Drucker has been famously quoted as saying, “Culture eats strategy for breakfast” (Cave, 2017). Whether or not this attribution is correct, the sentiment describes why organizational change is so difficult. This is true at an organizational level, but also at a personal one. Looking back at past months I can see a variety of ways that I may have inhibited my own success by unconsciously adopting the behaviors my project was tasked with shifting.
To offer one important example, I internalized the team’s bias towards speed and action specifically in my whole-team interactions. I unconsciously adhered to a perceived rule that full-team activities should be short and should drive to “next steps” as quickly as possible. This meant that I found myself holding back my bolder, more creative ideas for things we might try on the team and opted instead for technical, straightforward changes. Tellingly, Dr. Rabbitt commented at one point that she was surprised the ideas we produced were not more “whimsical” or out of the box. I had engaged in a pattern of activity where I gathered information in one-on-one interviews and through surveys, processed it with my work partner, and then played the findings back to the team, opting for various “show and tell” moments over facilitating more ambitious interactions that may have fostered deeper shared understanding and commitment. The result is that the formal change has been relatively technical and incremental, although it is possible that people’s own internal change may quietly run deeper. (I suspect this to be the case.)

Small, technical changes have value, even on small teams, as they allow people to adjust bit by bit to new ways of interacting and behaving. That said, one of the advantages of small teams is the promise of agility in the presence of new goals. I believe that the TLA team may have welcomed a bolder agenda, especially if we had had the advantage of more face-to-face time together. As we look ahead to future work together, it will be important to keep in mind, as Lindblom (1969) cautions, that it can be all too easy to rule out changes, “for no other reason than that they are not suggested by the chain of successive… steps leading up to the present” (p.80).
Team-Based Influences on Change

Window of Opportunity. John Kingdon (1995) coined the phrase “policy window” to describe political moments that are ripe for change due to a transient intersection of factors. While policy is a different context than organizational development, the analogy holds. There are times when people are simply more open to change. My time at TLA coincided with one of those moments.

The beginning of my residency overlapped with the end of Dr. Rabbitt’s first year of leadership, and the transition from Scott Ellis to Dr. Rabbitt had been substantial. Team members experienced the transitions in different ways, but each spoke about it as a critical moment of disruption. One team member described the transition as a moment of coming to terms with aspects of the organization she had not previously seen:

Part of the reason the transition was so traumatic is because we thought we had more decision-rights. The culture was that we were all deciders and the culture was transparent. And then suddenly [the decision] was made and announced. [Scott] always said, “You will know if we have big decisions, you'll have a lot of lead time” and then I got the call. We were led to believe that there was more transparency than there was.

Another team member saw the change in leadership as the start of a new set of possibilities for growth and development:

I was so excited about the transition. It was like, ‘holy shit, there’s a young woman who is going to be our leader.’ It almost makes me cry to think about it. I had so much admiration for Beth to take this on. The transition was a very empowering moment. It almost seemed like I had a new job. I was excited to re-learn who I was working with. There was a real growth moment for me.

The team had been shaken up and then had a year to settle into the new team dynamics. Upon my arrival, the team was no longer in a state of flux, but it had also not completely settled. The team was expanding (in my first two months, two new team members were
hired and another two were staffed by March) and, with every new hire, was absorbing new working relationships and dynamics. This interplay between stability and change created favorable conditions for new conversations about how the organization wants to think about team integration.

**Lean Startup Culture.** While much of my strategic project focuses on understanding and shifting parts of TLA culture and practice, there are also important elements of the organization’s culture that make this work possible in the first place. The TLA culture handbook names the following actions under the category continuous improvement and persistence: “We adopt practices that help us-- individually, as a team, and as a community-- constantly get better. We set high goals, develop hypotheses, prototype, and measure our progress as frequently as possible.” As with many of TLA’s articulated values, members of the team interpret and live out these values continually, if not always consistently. It is not uncommon for team members to have informal one-on-one conversations where they share feedback on work products and, increasingly, on interpersonal challenges. TLA content often goes through several iterations that includes feedback from practitioners in the field to ensure it creates genuine value. This mentality of continual iteration had enabled TLA to be responsive to changes in the sector, and it also inspires a willingness to be “persuadable” about the value of trying new things.

The impact of this part of TLA’s culture is that the members of the team have genuinely engaged in the process of testing new team processes, have been forthright with their concerns, and have willingly offered ideas for what we might try together. Team surveys and interviews revealed general preferences for more feedback, and the
atmosphere of the organization is quite welcoming to opposing ideas. In the TLA culture survey, team members were asked to reflect on their level of comfort with sharing ideas with the team, and the extent to which they felt they could bring their “whole selves” to work. No team member expressed a lack of psychological safety on the team. In fact, the only person who was ambivalent (giving a “3” out of 5) for two of the questions was me (responding cautiously as a new hire) (Figure 17).

Email discussions support these results. The TLA team often has spirited discussions about articles or other pieces of media both in meetings and online. Here is an example of one recent exchange over email (truncated for ease of reading):

Partner 1: “Dr. <name removed> (Associate Researcher from Harvard) said that in many ways ed tech developers are modeling the design elements that we would want the larger consumer product developers to emulate. The goal of ed tech is student-centered, about teaching and learning, learning goals are the core...and these are humane goals as
opposed to just keeping the kid on the app for as many hours as possible (YouTube, Snapchat, FB, etc).”

Partner 2: Thanks for sharing! On a personal note, I've been using the Moment app for a few weeks now and love it (recommended in the “tips” link). I also just switched my phone to grayscale [to limit my own phone use]. Looking forward to trying that out.

<Several team members write about ways they are limiting their personal usage>

CEO: Hmm... I'm probably in the minority, but I'm more worried about blanket reactions here than being “addicted” (note this is a hijacking of a medical term). I'd argue for taking a more measured, personal approach. I don't look at my phone during meetings/work day time, have set times for checking social media, and try to be present when with people. I value my phone as a reading and picture-taking device, so won't be moving to grayscale. Just wanted to express this difference in opinion.

Partner 3: I see your point, but I do think for generations younger than us, there is actual addiction (as in, meets the medical definition of the term) happening, which we're potentially modeling as parents/adults who constantly respond to our phones. Personally, there are definitely times I've found myself refreshing a FB feed and craving a new post/like/anything (that it's FB rather than Snapchat marks me as Xillenial, lol.)

This dialogue, a common one to play out in the TLA team, shows a general comfort of many members of the team with trading ideas, even with the CEO. This comfort is not limited to team members with a long tenure. In an interview, just weeks after being hired, here’s how one junior team member described her experience at TLA, “I feel like this team makes it really easy to ask questions. I make gaffes all the time and [my colleagues] made it really easy for me. There’s a lack of judgment about when things go awry. There’s no feeling of: Wow, you really messed that up.”

The effect of this culture on the success of my strategic project is that it has created a far more hospitable environment for my own iterative strategy. Even the most skeptical team members have told me that they are willing to try out new ideas and have followed through. On a team of concrete thinkers who like to produce, this willingness to suspend disbelief is particularly helpful. As a final point, I will add that I believe Dr. Rabbitt’s influence was particularly important. She displays an ongoing willingness to be
self-reflective and vulnerable even as she expresses strong, direct opinions. Her leadership in this regard enables others to follow suit and maintain an open stance in face of uncertainty, even if this is not their natural inclination.

“What is the value of shared work?” The TLA team has not historically had clear priorities for what it has meant to accomplish together (as opposed to separately). When asked on a confidential survey whether or not the team does a whole, identifiable piece of work together, only half the team replied affirmatively. Tellingly, one respondent wrote into the survey, “I’m not sure I WANT us to be doing a whole, identifiable piece of work together.” Wageman et al. (2008) write:

Teams are at their best when they are challenged and are providing real value to the organization...yet leaders frequently over-challenge individuals and under-challenge teams...consequently, the work of the team inevitably feels less important than the work of the individual members, and they wander away to focus on what they see as the most important of their accountabilities (p.61).

The TLA team rarely engages in work all together, but instead uses time together to inform one another about their different pieces of work. A quick coding of team meetings that I attended from July through December revealed this pattern. In the 18 meetings, 78% of the team’s time was spent informing one-another about different pieces of work and/or the status of the field via relationship and project updates. Another 18% of the team’s time was spent in discussion (e.g. discussing opinions about a new piece of research in the field). Only 3% of the time was spent making decisions or actively problem-solving together.

Wageman et al. (2008) write that when team members largely come together to report in about individual areas, their “sense of purpose evaporates,” and “members soon
perceive their team interactions as a waste of time, and they give little time and energy to them” (p.61). Absent opportunities to solve difficult problems together and engage in meaningful shared work, TLA team members may continue see their own, individual work as the heart of their contribution to the organization. It is possible that a further factor holding back team coherence is a shortage of time working together to set and then track clear and compelling team-wide goals that motivate team members to achieve them, even while attending to their own projects.

However, Dr. Rabbitt has rightly pointed out that organizations rarely task the full complement of employees to attempt hard work together, but rather delegate these challenges to sub-teams. This brings into relief the distinction between “organization” and “team.” I have operated from the beginning of my residency with an implicit assumption that TLA “the organization” should also function as TLA “the team,” but it has taken several months for me to be able to articulate why. It is that by puzzling through organization-level challenges together, that the team will be more likely to align and to coordinate action, and also heighten team members’ sense of commitment and engagement with one-another’s work in a collaborative way. Absent some measure of common teaming effort, the siloed pieces of the organization will not integrate.

*The Influence of 1.0.* Two key challenges in creating organizational change are the expectations and habits adopted by the team in earlier years, and the divergent perspectives held by those who lived through those early years and those who did not. Talking about “TLA members” as a group, much like talking about “averages,” creates a false sense of uniformity between people. The staff of The Learning Accelerator are not
always aligned and they group themselves in various ways. There are the “West coasters” and the “East coasters.” There is the Research & Development team and the Communications, Dissemination & Engagement team. Perhaps, however, the most significant divide is that between “1.0ers” and “2.0ers.” The 1.0ers are team members who were hired by, and worked for, Scott Ellis during TLA’s founding years. The 2.0ers, myself included, are people who were hired by Dr. Rabbitt after the transition and who therefore do not have an experiential memory of TLA’s first phase. The historical memory of TLA’s 1.0 phase as well as that of the transition itself plays a dominant role in the underlying assumptions of the TLA 1.0 team.

While strongly loyal to Dr. Rabbitt, the members of 1.0 carry with them warm memories of the organization in its founding days. When asked to describe the organization under Scott Ellis, descriptions border on nostalgic. “In TLA 1.0, we each decided our paths for ourselves, along with Scott, but there was a lot of collective decision-making. Now we don’t really have those individual ownership pieces.” Those in the 1.0 group also make consistent, periodic reference to the early days being “bold” or goals being “bigger.” One partner explained to me, “I liked the system-level approach of TLA 1.0 – looking at all the pieces in the sector and seeing how to make wholesale transformation through investment. It was a big and bold vision.” Another told me, “In 1.0, we had big, aspirational goals that we could align to. Those are the kinds of conversations I’m craving more.”

At the same time, the same team members also see substantial benefits in both Dr. Rabbitt’s leadership and in the strategic pivot. Most of these partners have told me that they believe the current strategy to be more practical and potentially impactful. Partners
also acknowledge the value of moving away from the hub-and-spoke model. In an interview one partner told me, “We had more autonomy then, but we were siloed.”

Another partner explained that the TLA culture was far more avoidant in past years. A member of “2.0” recently told me, “One of my frustrations is the way a lot of people make decisions without sharing, or share them once, but without building buy-in. It can’t just be an FYI, it has to be about building engagement and buy-in. People aren’t going to collaborate unless they feel connected.”

Historical routines have a habit of being hard to change, even if we do not have a clear idea of why we do them (Kahneman, 2011). We may adopt liberal ideologies or religious beliefs as children, for example, and internalize them as values without ever subjecting them to logic-based scrutiny. Similarly, organizational routines can get entrenched and then remain unquestioned, even when context shifts. I came up against some of these historical structures at various times throughout my project, including why meetings are structured as they are, what it is reasonable to ask of others or even how many times a year we should meet in person. Over time, however, the team is starting to question these norms. In our last team meeting, for example, Dr. Rabbitt asked the team to reflect on whether we should be adding a second in-person retreat each year. When I posed the same question to a team member five months ago, she responded, “Personally, I agree. But that’s not the way we do it.” The work of reimagining the value of the team is made easier when historical norms can yield in the presence of new people and new organizational challenges.
Implications for Site, Self and Sector

*Implications for Site*

In an interview with Scott Ellis, he explained that a hub-and-spoke structure offered him a strong measure of control over the organizational culture when he was CEO of TLA. As he described it, “I could put into place the often-invisible infrastructure that enabled an effective culture to blossom. It enabled it to be my vision that drove the organization.” Ironically, what many team members perceived as a flat, egalitarian culture was being deliberately constructed, leaving significant power in the hands of the CEO. Dr. Rabbitt has added hierarchical layers to the organization which, while appearing to make the organization more centralized, actually disperses some of the influence that Ellis held. This is because as TLA moves from a centrally controlled, flat organization into a more complex organizational structure, nodes of communication also get more complex (a weekly check-in with the CEO, for example, disperses into multiple manager relationships and project teams).

This means that the narrative of the organization (how it is performing, the value it is creating in the sector, what value different team members bring, etc.) is not filtered through one central channel but is instead recreated again and again in conversations at different levels of the organization. The benefit of this is increased opportunity for diverse perspectives, for creativity, and for new models of what the organization could be. But the downside is that in the absence of the team intentionally talking about these narratives they can become scattered or haphazard and may exist implicitly instead of being able to be wielded explicitly. This can lead to privately held measures of organizational success also being scattered or haphazard. My recommendation, therefore,
is that the TLA team take the time to deliberately build that shared narrative – the story of
TLA as it currently stands, not as it was. This is not an origin story, but the causal model
of the current team strategy and how it will lead to impact in the sector. This includes
aligning around a story of success by defining a small set of clear, measurable goals that
define “job done” for the team over a fixed period of time. For a team that values
iteration and adaptability, and which sees its work as ongoing, this may feel artificial. But
without a shared set of clear, measurable goals, team members will have nothing
concrete to align around.

A further benefit to defining clear, shared goals is that it enables the team to begin
to make distinctions between work they can and should manage alone, work that must be
coordinated so that people do not “crash into each other,” (such as which district leaders
TLA partners are contacting), and work that must be collaborative because, for example,
their outputs are interdependent (such as TLA’s ability to attract district partners based on
work it has produced and its ability to create new knowledge with them). If the TLA team
describes all “team work” in similar terms, it may miss that there are different
competencies associated with coordination (e.g. good communication, organized
information management, etc.) than with collaboration (e.g. ability to listen to others,
take intellectual or emotional risks, productively manage and integrate different ideas or
perspectives, etc.). By drawing these distinctions, the team may also avoid the trap
common to small, multi-team organizations of neglecting to properly prioritize important
work over urgent deadlines or of being unsystematic in staffing and other resource use
(Mortensen and Gardner, 2017).
Dr. Rabbitt has laid the groundwork to enable this conversation both by laying out an organizational strategy and also by encouraging sub-teams to set clear goals for the year. She has also initiated a conversation about how the team uses its time together, which also helps build this conversation. The output of an effective goal-setting process would be that any member of the team can answer the following questions:

- What is the “shared work” of the TLA team as a whole?
- What evidence would we need in order to know that we have succeeded as a team this year?

The two questions listed above could enable the team to articulate and internalize the value of shared work, rather than merely acknowledging it on a more theoretical level. In order for this to have impact, however, it will be important to reinforce the connection between effectiveness and reflexivity (i.e. that reflecting on one’s work makes it better) so that team members do not feel like they are being taken away from work that matters to “navel gaze.” It is also critical that team members all have a hand in co-constructing these goals, so that they understand their origin and are bought into them, so they can move towards them in their own ways instead of being told what to do next.

Another recommendation is for the team to deliberately drop the use of the terms TLA 1.0 and 2.0 and opt, instead, for a way of describing the organizational narrative that is free from historical comparison. I believe this shift should infiltrate not only the language the team uses, but also its written output, including small details like how folders on the shared drive are labeled. It also means allowing the team to reimagine “givens” that the previous team took for granted. To use a metaphor, it is similar to a romantic couple living in the house built by a previous marriage. Just as the new couple
would need to renegotiate on its own terms how the house is furnished, rather than assume everything will be left the same, it makes sense that as the team launches into its new strategy with a new configuration of people, it also renegotiates its processes or norms. Context (including historical narrative) “can affect the observed range of organizational variables under consideration” (Johns, 2006, p. 396). By understanding the impact of historical narrative, but not treating it as fixed, the team can continue to expand this range of variables to fit new contexts and future strategies.

| Benefits: | Benefits: |
| Accounts for other priorities team members have | Time to leverage genuine diversity of thought |
| Get through all items built into agenda | Can build on ideas (instead of running with the first ones) |
| High energy boost from accomplishing tasks | More time to get to know individual perspectives |
| Clarity and certainty (around process and the “what” of the task) | Clarity and certainty (around the “why” and “to what end”) |
| Can more easily plan and prep | Deeper reflection and time for feedback |
| High output enables new work to emerge | Opportunity for surprising insights |

| Efficiency | Reflectiveness |
| Limits innovative or creating thinking | Limits efficiency |
| May reduce coherence and/or relatedness | Takes time away from other priorities |
| Privileges quick answers over quality answers | Stalled or lumbering process |
| Feeling that decisions can’t be reversed | Lack of clarity can make planning ahead difficult |
| Desire to not derail momentum may quiet some voices | Potential to privilege loudest voices |
| May promote individual work and collective compiling (rather than genuine collaboration) | Could be used to avoid pushing forward on certain issues |
| | May crowd out certain conversations in lieu of others |

**Figure 18: Exploring the polarity between efficiency and reflectiveness**

One of the narratives the team might explore involves the organizational language around efficiency or “urgency” versus reflectiveness or “navel gazing” (*Figure 18*). This language has emerged in part due to TLA’s real need to produce work continually in order to attain funding. If TLA does not show value in the short term, funders may decide to put their money elsewhere and so the urgency of production is quite real. Yet this produces a catch-22. If the TLA team continually prioritizes efficiency and sees reflective
or learning conversations as unrelated to work, it is likely that quality will suffer in the long-term. It could be valuable for the team to explore this dynamic explicitly to devise internal strategies that maximize the benefits of both without fully succumbing to their drawbacks.

A final implication for TLA is the opportunity to leverage conflict productively as a springboard to talk directly about how to embrace more diversity on the team. As Peter Hawkins has written, “The conflict in a team should be no greater or no less than the system they are leading and operating within” (Hawkins, 2014). The TLA team has launched important conversations about the implications (and importance) of having a more diverse team, and has also taken active steps to consider what diversity means for themselves as individuals and for each other as a collective. One implication of being a moderately homogeneous team (in some, although not all, respects) is that we can fall into the trap of assuming that others think the same way we do and therefore we don’t need to raise conflicts to the surface. Yet as Nickerson (1999) reminds us, our empathic accuracy is pretty weak and the more similar we perceive a person to be to us, the more leeway we give ourselves to make assumptions about what he or she thinks. Again, from Hawkins (2014),

Organizational culture, which we sometimes define as ‘what you stop noticing when you have worked somewhere for three months’, has as one of its functions to ‘create social cohesion’, but in so doing further lessens the amount of independence and diversity. Collective assumptions and beliefs develop and create limiting mindsets that constrain the thinking and creativity of the team. (p.26)

As a team, TLA has taken proactive steps to not only become more outwardly diverse (in terms of visible identity markers), but also to directly embrace diversity of thought. If we address and reflect on conflict as it arises, we can develop stronger
muscles as a team to hold and name challenges that emerge from divergent ways of thinking.

Implications for Self

More than ten years ago, I was participating in a team exercise during my MBA program where we were solving brainteasers together. A team presented their solution, with complex mathematical calculations, but I knew the logic was wrong (because I had seen the brainteaser before). The instructors called me up to explain my critique. But before I started speaking I said, “I’m not a math person, so I’m going to explain this a different way…” The result was that, in a room of engineers and finance professionals, I was unable to convince a single person of the correct answer. The team’s math calculations went unquestioned and I sat down, embarrassed. Later, when others redid the math they realized I was right. But it did not help my credibility. I had disqualified myself as capable of “playing the game.” The lesson I learned then, and find myself continuing to relearn, is that in order to engage people you need to understand the language they speak. This means more than simply understanding the language of the team or organization with whom you are working. You also need to understand the underlying mental models that govern it. In the case of my MBA program, it was a model that privileged quantitative reasoning. At TLA it was the importance of showing oneself to be a “producer,” and the ability to connect abstract theory with tangible practice.

Just as reforms generally fail if they do not solve a genuine problem, influence fails in the absence of deep understanding of those with whom you work. To this end, first impressions matter. A 1993 study showed that students watching clips as short as
two seconds could accurately predict a professor’s end-of year course evaluation ratings (Ambady and Rosenthal, 1993). First impressions can lay the track or throw up walls for future work with others. Even as I know this, it is still a leadership challenge for me. In my own PCF conversation with Dr. Rabbitt, she reflected to me, “You are someone that values creativity and new ideas and that makes you a great strategist. The team does, too, but they take their source of authority from things that have been previously established. When you use tangible entry points and established, accepted frameworks, rather than high-level theory, that is when you’ll be the most successful pushing your work forward with the team.” At the time, I felt she was right and the advice has stayed with me since, even as I sometimes struggle to apply it. This advice has important implications for my future work, however, since most practitioners (and even many theorists) look for concrete entry points to engage.

A further point of reflection is realizing the difficulty of “walking the walk” as a leader. To take one example, I have spent a good deal of time espousing the importance of challenging, shared work (and shared outputs) to ensure that teamwork has purpose. Yet for much of my project, I asked relatively little from team members outside of my partnership with the Chief of Staff. I took it upon myself to do the bulk of the “difficult work” perhaps because I did not want the team to feel like I was making onerous requests on their time or because I was tiptoeing a little too lightly as someone without positional authority. Yet by holding back challenge for others, I missed an opportunity to engage them more actively in the process.

The implication for me as a leader is that we do not affect much change by “espousing” things. We might gain people’s interest with a good presentation, or even
inspire them, but it will not change behavior in a meaningful way. People look at what leaders embody, not what they say. To take a concrete example, this is one of the reasons why the TLA norm to not send emails after hours has remained so constant. Dr. Rabbitt no doubt works beyond these hours, but I can count on one hand the number of times she has emailed me after 5pm. As a mother of two young girls, she has clearly put effort towards embodying the value of work/life balance and this has enabled the rest of the team to do the same. If she started to send regular weekend/evening emails, we would surely see the rest of the team follow suit.

A third implication for my own leadership is an insight that emerged over time as I observed the way I had defined “psychological safety” in my diagnostic. While true that the TLA team in general reports high psychological safety when asked directly, and displays it regularly in particular situations, such as debating current events, there are other ways in which psychological safety is not high. For example, after a recent team meeting that ran short (as, unusually, TLA meetings frequently do) I expressed surprise to a colleague that we had ended so quickly. “There’s no question that we have more to discuss together,” I said. “Why don’t we use the time we’ve allotted?” To this my colleague said, “I totally agree. It’s actually something that frustrates a number of people. I guess people just aren’t interested in stepping up.”

Is it a lack of interest that prevented us from taking action? Neither my colleague nor I (nor any other team member) vocalized this concern on the call itself, even though we were directly asked, “does anyone else have something they want to talk about?” While this could reflect a lack of engagement, I am more inclined to believe that this reveals that there are rules we are subconsciously following (e.g. “Don’t take more time
than absolutely necessary”). While there are certainly areas we are relaxed and psychologically safe, there are others where we still hold back.

The implication for leadership is first understanding that psychological safety – enabling team members to take risks, express bold ideas and opinions, or take an opposing stance- can exist in some areas and not in others and the dynamic is not always readily apparent. As I think about engaging in my own future work, one of the first things I plan to track is what is said publically versus what is only said privately. Rather than asking, “is there psychological safety on this team?” I will be more inclined to ask, “in what arenas does risk taking and direct speech happen and where is it reserved for private conversations?” My hope is that by applying this more nuanced lens, I will be able to add value more quickly and in a more targeted way.

**Implications for Sector**

While this project has focused largely on change within one start-up organization, there are numerous connections between the work we have done internally at TLA and the challenges faced by the broader education sector. First and foremost is the challenge of building capacity. Within TLA, we have been working on strengthening our external impact by increasing internal capacity. We have focused on knowledge sharing, centralizing information, and increasing accountability and feedback not for their own sake, but because these actions (and systems) enable us to have more impact together than we would have as a group of 12 independent practitioners. The TLA team has recognized that we cannot effectively pivot from investment in infrastructure to working on deeper, more systemic challenges inherent to implementing blended learning (such as
equitable access to high quality resources and support or the conditions for district-level culture change) without harnessing our collective intelligence.

Lack of collective capacity is, of course, not just an issue for individual organizations. It is endemic to the sector as a whole and part of what holds back districts from implementing innovations like blended learning with more rigor and comprehensiveness in the first place. A set of 25 convenings that TLA conducted with 120 blended learning school and district leaders from across the country in 2016-17 (Appendix IX) revealed that leaders often felt they were operating with limited capacity “on an island” apart from others doing the same work, and felt that they faced a “cliff” sized drop in support once they moved past an initial pilot phase. Leaders expressed a shared desire for, among other things:

- Increased sharing of practices with other schools/districts
- More aligned supports within districts
- Leadership coaching to build their own capacity

My own interviews with 35 district leaders (including superintendents and directors of blended or personalized learning) across the country revealed similar capacity challenges and the feeling of being isolated, often within their own organizations. Leaders often explained how vital information sharing is to successfully break down these silos. John Rice, former Director of Blended Learning for DC Public Schools (the first to be named in the country, in 2012) explained to me,

When I read a case study, for example, that shows what a school or district is currently doing and what results they are getting, I have an inherent skepticism. I feel like they are not giving me the real story in that summary. Sure, maybe their math scores have increased by 35% in two years, but they don’t share what test it was or explain what kind of trial and error they went through. They just hint at the years in between, but I
WANT to hear the journey. I want to hear the nuts and bolts – that’s what’s going to be genuinely helpful.

Peter Fishman, VP of Strategy at Deans for Impact, spoke to me about the poor state of communication in the education sector as a “learning market failure.” As Fishman explained it, the education system is set up to capture only surface level anecdotes because districts often lack the capacity to reflect on and tell their own story and the third-party organizations that write the case studies frequently have only a surface-level understanding of the districts’ journeys. “The sector is producing exactly what it’s set up to produce,” he reflected.

As a result of this “learning market failure,” leaders of blended learning initiatives will likely only begin to create a rigorous and coherent movement if they are building collective capacity and learning from one another’s real experiences – both the successes and also the failures. This requires coordination not only of information, but also of the intermediary organizations that have sprung up to support districts’ efforts. By working to create more interdependence internally, TLA is cultivating a wider set of skills to help these external organizations cohere and to share resources, negotiate common vocabulary, align around definitions of quality, and push for approaches that genuinely serve all students.

One of the key lessons we have learned from our internal work over the past number of months is that people often need to experience something themselves to fully engage with it – be it an instructional practice for the classroom or an internal team process. Most knowledge sharing in the education sector, however, is done by non-experiential means, translating research or practice into discrete pieces of curated
information. Theorists or practitioners give talks at conferences, teachers visit others’ classes and take observation notes, or, as I explained above, we read white papers written by people who are not actively engaged in the day-to-day work of teaching. Even those of us in the sector who are searching for better alternatives to the traditional one-way downloading of information common in our public-school classrooms often struggle to change the way we communicate (and attempting to drive behavior change) ourselves.

Yet the best successes arose at TLA when we asked people to engage in small behavioral experiments - to change how they acted before attempting to change how they thought. I have witnessed a similar lesson by speaking at length with people championing blended learning in various districts around the country. In a survey that we have currently out in the field to leaders of personalized and blended learning, 56% of respondents say that their district has favored teacher-led, experiential implementation, while only 25% favored a more comprehensive, top-down approach. For example, in districts such as Greeley-Evans School District 6 in Colorado or Chicago Public Schools, leaders have opted to decentralize implementation of blended learning in order to give individual schools the opportunity to go through their own trial and error process, and thus genuinely own it. By creating networked learning communities, TLA is also attempting to tackle the challenge of connecting evidence-based theory with on-the-ground experiences of practitioners.

Another lesson is that change work may be slow and incremental, but it is next to impossible without shared goals. For even in a small start-up organization, shifting the historical narrative and generally accepted models of how the organization works is very difficult. What I discovered through my work with The Learning Accelerator is that
establishing clear goals and a clear purpose (one that is tangible enough to track progress) is a prerequisite for coherent organizational change around a shifting paradigm. The ability to unify around a shared set of objectives creates energy and direction, and also provides a reason for people to come together, rather than operating in silos. Without that purpose, even incremental change is unlikely. What is the implication, then, in a sector that has no unifying purpose but rather serves a variety of conflicting objectives? (Cohen and Spillaine, 1992, Labaree, 1997). Charles Lindblom (1959), writing about the development of public policy, asserted that because, in a world of conflicting priorities, it is virtually impossible to decide which deserves the most attention or has the most merit, the general practice is simply to enact a series of small incremental changes based on what can garner the most support. As Cohen and Mehta (2017) have demonstrated, this generally holds true in the education sector as well. The most successful system reforms (at least in the American educational system) generally take the form of being readily digestible and of requiring relatively little change in day-to-day practice.

Rather than be disappointed by incremental change, however, we can instead look at ways to rally and organize partner organizations (including districts) to focus collectively on small but clear improvements. Michael Fauteux, the Director of Innovation of Leadership Public Schools, names this strategy of seeding micro-changes through his system, “disruptive incrementalism.” “Micro-changes add up,” he explained to me. Some of these changes happen from the ground up, as with teachers’ use of student “exit tickets,” but the most consistent and coherent changes demand that actors at multiple levels of the sector work with common information towards shared goals. Just as
there must be formal structures for sharing information within organizations, even “micro-changes” will not scale without collective effort.
Conclusion

In *The Flat World and Education* (2010), Linda Darling-Hammond argues that the American struggle to fulfill its promise of educational equality for its young people is not only about access to schooling, but access to “an empowering form of education – one that can enable people to think critically and powerfully to take control of the course of their learning, and to determine their own fate – rather than merely to follow dictates prescribed by others” (p.28). This kind of educational environment – one that prioritizes giving all students a voice in deciding how and what they learn and access to high-quality learning experiences – is a primary goal of the blended learning movement. Leaders who have spoken to me about their reasons for scaling blended learning initiatives have expressed, in particular, a keen awareness of inequitable achievement gaps throughout their districts or schools, and a desire to find scalable ways to close them. Dr. Leviis Haney, the Principal of Lovett Elementary school in Chicago, for example, explained in an interview we captured on film,

> We realized that in any given classroom, our students were at varying levels, and we found that giving them instruction in one way was just not working for them. We found that some of our students were disconnected from learning… some of our students were left behind. The biggest piece to our model was – how do we give our kids what they need and when they need it? (“Why make the shift” 2017).

The mechanisms for providing all students “what they need and when they need it,” however, are relatively easy to test in pockets, but extraordinarily difficult to scale system-wide in a sector that lacks a cohering, underlying infrastructure that could support meaningful, widespread reform (Cohen and Spillane, 1992, Cohen and Mehta, 2017). School districts generally lack internal capacity to innovate in consistent or rigorous
ways, let alone to share their learning with others. This means that even in places where innovative models like blended learning are leveraged with success, these models are difficult to sustain, let alone replicate elsewhere.

Intermediary organizations like TLA have arisen to help alleviate this capacity gap, but, as leaders of these organizations well know, they have constraints of their own, including over-extended teams and continual pressure to fundraise and to justify their value. Formal structures for information-sharing, clear metrics of team success, and transparent accountability systems make it easier for team members to push ahead without wondering why or how they should be doing their work, but structures alone are not sufficient. In order to build their capacity, teams must develop a shared narrative that concretely links the purpose of their shared work to better outcomes in the field. In TLA’s case, developing that shared narrative means breaking with some of its past identity and redefining its purpose to better serve the current needs of the sector.

In a 1992 Harvard Business Review article entitled, “The New Society of Organizations,” Peter Drucker argued that unless organizations develop the agility to let go of old practices and ideas, while simultaneously creating and adopting new ones, they will become obsolete in the new knowledge economy (Drucker, 1992). This idea approaches cliché today but in 1992, only two years after the invention of the term “World Wide Web,” the idea of a knowledge economy was relatively new. “In this society,” Drucker wrote,

Knowledge is the primary resource for individuals and for the economy overall... at the same time, however, specialized knowledge by itself produces nothing. It can become productive only when it is integrated into a task. And that is why the knowledge society is also a society of organizations: the purpose and function of every organization, business and
non-business alike, is the integration of specialized knowledge into a common task (Drucker, 1992, p.95).

Over the course of my year with The Learning Accelerator, I have come to appreciate the importance and also the difficulty of Drucker’s challenge to organizations. As TLA shifts from a young start-up organization to a more established one, it must engage with both of Drucker’s imperatives: maintain an ability to adapt while simultaneously creating formal systems to channel the specialized knowledge of its team members toward a coherent goal. Continual change is antithetical to both individuals and organizations, but it is not impossible. This balancing act will be playing out continuously in the background as TLA pushes forward in its efforts to raise the sector’s collective game on behalf of all students.
Bibliography


Appendices

Appendix 1: TLA Culture Handbook

TLA MISSION AND VISION:
Our mission is to transform K-12 public education by accelerating the implementation of high-quality blended learning in school districts across America. We envision a future in which every school in the country implements high quality blended learning and all students receive an effective, equitable, and engaging education that is personalized, informed by data, and mastery-based, enabling them to reach their full potential.

ABOUT THIS DOCUMENT:
This handbook includes information on TLA’s values- the pillars of our work and culture. It is intended to be a living document that describes how our team enacts them in our day-to-day work. It is written for:
- Those of us who have been part of TLA for a while and have had a role in our evolutions and, while adapting to them, want to know how to stay involved and on track;
- Our new team members, who ask themselves how we operate and what is “the TLA way of working and operating?”;
- Potential new team members who are interested in our work and how we make it all happen, so they can make an informed decision about whether they want to come aboard; and,
- Anyone interested in knowing how we work in a completely virtual environment where remote work, video calls, and different time zones are the norm.

Our original TLA values were created by the founding team in the summer of 2013. We used a process inspired by Tony Hsieh’s Delivering Happiness culture framework to articulate core beliefs that we wanted to make central to our work- externally as well as internally with each other. As a team, we revisit these values often, making changes as needed. In the pages following, these values are individually described. Further, we articulate the three other additional elements that help us translate our values into action:
- **Operationalization Actions**, reflecting team-level, content-driven actions (or, how do we live by our values as a team)
- **Behavioral Norms**, team agreements about how we operate at the individual level (or, how do we live by our values as individuals)
- **Cultural Artifacts**, the tangible elements that promote connections amongst the team and individuals. They are agents for creating and sustaining the organizational culture and aim to: celebrate individual and team successes, and each other; help colleagues feel like they are one strong team; create traditions that connect and cohere the team.
TLA’S CORE VALUES:
As a team, we commit to applying the following values internally and externally in our work:

- Kids First
- Urgency
- Equity
- Bold Ideas and Action
- Collective Intelligence and Impact
- Accountability
- Continuous Improvement and Persistence
- Honesty, Trust, Respect
- Fun and Flexibility

KIDS FIRST
Our work is about changing the learning opportunities and lives of kids. Period. Technology is a key to enabling this vision at scale, but student learning is the metric against which we assess strategy. Similarly, we try to avoid getting into disagreements amongst adults, aiming to stay objective, free of conflicts of interest, and focused on the larger task.

Operationalization actions
- Set metrics and objectives for success that are focused on student learning, directly or indirectly.
- Talk about technology and blended learning as a means, not an end in itself.
- Be willing to change or renegotiate adult relationships if not meeting goals.
- Abide by a clear team conflict of interest policy to preserve our neutrality.

Behavioral norms
- Never forget our main priority: provide each kid in America with high quality education.
- Be open and willing to ask and explore how our actions, individually and collectively, will forward our “kids first” mission.

URGENCY
We exist to catalyze and accelerate; while we know school transformation will take time, we seek speed and scale. We are proactive and have a bias toward action, and we take initiative for coming prepared and moving work forward through responsiveness and follow-through. In order to maximize our impact, we also use our resources -- time, energy, and financial and human capital-- wisely, never letting perfection get in the way of forward progress or making changes when we recognize our current strategy isn’t accomplishing our goals.

Operationalization actions
Commit to specific, time-bounded horizons for our work (organizationally and sectorally) by operating in phases focused on shorter-term but ambitious goals; we will continue until the job is done, but we keep this focus.

Work proactively with partners who share our aim for scale/transformation.

Behavioral Norms

- Take responsibility to perform as best as we can as a team and individually.
- Come to all meetings as prepared as possible.
- Seek to start and end on time (team punctuality agreement); we don’t take it personally if a meeting starts without us if we’re running behind.
- Aspire to a 24-hour response time for email, externally and internally (team responsiveness agreement), which could include a simple acknowledgement of receipt.

EQUITY

Our work aims at increasing educational equity—we envision a fair and inclusive future in which personal or social circumstances such as gender, ethnic origin, economic, or family background, are not obstacles to achieving educational potential and that all students reach at least a basic minimum level of skills they need to succeed in college and life (a definition adopted from the OECD). This commitment entails both external and internal work on our part. Externally, we believe blended learning can and should be a tool for reducing inequity. At the same time, we must be mindful of the ways our work could increase gaps and divides, so commit to understanding and enacting strategies that ensure that all students in the U.S. receive the benefits of blended learning. Internally, we seek diversity and inclusion on our staff and board. We believe that diverse and heterogeneous skills, identities, mindsets, and experiences lead to stronger organizations, better decisions, and higher impact for kids.

Operationalization actions

- State educational equity as a goal of our work.
- Actively pursue diversity in recruitment and selection of members of the organization and the board as well as in participation in TLA programs and activities.
- Articulate and commit to explicit, diversity, equity, and inclusion strategies in each major workstream.
- Specifically measure the impact of blended learning on subgroups of students, with a focus on ethnicity, gender, language and learning differences and poverty.
- Seek diverse and heterogeneous perspectives in brainstorming and problem solving.

Behavioral Norms

- Are inclusive and supportive of every culture, background, and perspective that each team member brings so that each one of us can thrive and do their best work.
- Being open, vulnerable, and compassionate as learners... this work can be hard!
**BOLD IDEAS AND ACTION**

Our vision is ambitious, and requires us to think big and take risks to achieve it. While we are open to and encourage disagreement, dialogue and continuous improvement, we hold to our convictions. As thought-leaders, we seek to openly share our ideas and in-process learnings. We do this fearlessly, knowing we gain more from learning and encouraging others in the market to do the same than we do from being “right.” Finally, while we deeply understand the context of our work in schools and districts, we also respectfully question (and at times disregard) conventional wisdom, seeking analogies and solutions from other sectors and industries.

**Operationalization actions**
- Make big “asks” of ourselves and others.
- Plan for success; don’t be conservative in our thinking or goals.
- Identify entrepreneurial approaches that help us seize resources outside of our direct control to accomplish goals.
- Engage actively in thought-leadership activities at the national level.

**Behavioral Norms**
- Are action oriented and get things done in a highly productive and efficient way.
- Are not afraid to take the time it takes to do something well, or to work quickly if needed.

**COLLECTIVE INTELLIGENCE AND IMPACT**

We don’t “own” the solution or the capacity to produce the change we seek; we are betting on the power of many organizations and people-- including teachers, students, and families-- working together to transform education. As an ecosystem actor and partner, we are committed to thinking with others and sharing resources and lessons. Similarly, our success is connected, and we share credit. We work very flexibly in the ecosystem— we don’t care what we ourselves do versus what others do, we simply want to ensure that everything that is required gets done with high quality so that America’s kids benefit. We take advantage of our phased-action structure and collaborative approach to create unusual partnerships with other organizations. Where differences exist, we seek to ask questions to gain understanding. The internal processes and structures we adopt reflect our commitment to the collective.

**Operationalization actions**
- Explicitly invest in collaboration time and in sharing out lessons learned by us and others.
- Actively seek out and be open to different views and opinions
- Organize and optimize for a flat structure.
- Create room for everyone to have a voice in the decision making process (even if only for input, but aiming for greater collaboration where possible) and are open to listening to others’ opinions [Note: this doesn’t mean every decision within the
organization will be made by consensus. For those strategy/operational decisions that are open to the whole team, we use the fist-to-five process (team decision-making agreement).

**Behavioral Norms**
- Share openly and make information available to our colleagues.
- Are all equally accessible by other team members.
- Take responsibility for speaking and being heard, as well as creating space for others to be heard.

**ACCOUNTABILITY**
We take responsibility individually and as a team for delivering results and meeting the commitments we make. Our goals are directly connected to the strategies we enact and we assess our progress against them formatively and relentlessly. We aim for transparency and revise as necessary.

**Operationalization actions**
- Take individual and collective responsibility for performance of team and team members.
- Identify and commit to measures for outcomes.
- Share all data; good and bad.
- Pursue “delight” as our standard for quality of service, both externally and internally.

**Behavioral Norms**
As a team of professionals working remotely, we need to be(come) very good at using good judgement, resulting in:
- Doing our diligence to collect the information we need to make the right decisions.
- Demonstrating autonomy in and ownership of our work.
- Prioritizing effectively (for efficiency and to meet the needs of colleagues).

**CONTINUOUS IMPROVEMENT AND PERSISTENCE**
We adopt practices that help us-- individually, as a team, and as a community-- constantly get better. We set high goals, develop hypotheses, prototype, and measure our progress as frequently as possible. We reflect on our achievements, struggles, and failures, identify development areas, and devote resources and time to learning new skills.

We do not expect our work to be easy, and expect to run into challenges along the way. In the same way we are asking students and educators to adopt “mastery-based” mindsets, we seek to do the same in our own learning. We commit to “failing forward fast” and remember that change takes both time and dogged pursuit of good ideas. If others do not agree with us, we keep doors open for future collaboration.

**Operationalization actions**
Presume positive intentions when receiving input and feedback.
Set metrics/objectives for success and consistently track progress.
Transparently identify success and challenge areas.
Consistently apply principles of rapid prototyping to learn and improve.
Engage in individual and group professional development.
Do small projects or activities outside of TLA scope to help us get to know each other better and nurture our passion for this work.
Engage in on-the-ground school visits to understand evolving approaches, opportunities, and challenges.
Ask multiple times if we think we need to.
Use a competency-based approach for measuring our own development.
Keep options open and contingency plan, especially in the face of failure or resistance.

**Behavioral Norms**
*We are a team of constant learners and we always seek improvement. We:*
- Are not afraid to ask for help when we need it, or to ask questions.
- Share with others and are each other’s mentors.
- Are good listeners.
- Embrace failure as an opportunity for learning and improvement.
- Apply principles of rapid prototyping and reiterate where needed.

**HONESTY, TRUST, RESPECT**
We recognize our work is complex and that “change happens at the rate of trust”- we approach all of our work with the curiosity and humility necessary to earn that trust and the respect of each other, our partners, and stakeholders in the ecosystem. We voice our opinions and provide consistent and constructive feedback. We embrace our diversity of backgrounds, experiences, approaches, and skills and presume positive intentions when receiving input and feedback. We move forward together.

**Operationalization actions**
- Act with respect towards our partners and external organizations, their work and their ways.

**Behavioral Norms**
- Assume good intentions as a starting point in all interactions.
- Trust that our colleagues are performing as best as they can.
- Provide constructive and honest feedback regularly.
- Listen, don’t interrupt, make sure our team members feel like they are being heard.

**FUN AND FLEXIBILITY**
Our work is serious but also joyous; we strive to intentionally celebrate successes and to have fun working together in our journey to achieve big. Further, our team is made up of
experienced, committed professionals and our team processes are ours to shape and create. Because we trust in our individual strengths and styles, we value outcomes over inputs and seek to create systems that enable rather than prescribe; by working flexibly and cultivating healthy work-life balance we all perform at our best.

**Operationalization actions**
- Devote time to, and choose a point person for, team-building.
- Aim for least-restrictive work policies, allowing for individuals to choose how to work.
- Remember to have fun! We are doing exciting, fulfilling, important work to help kids.
- Do not have an expectation to put in hours/respond to emails outside of regular work hours Monday-Friday 9-5 (team work hours agreement).

**Behavioral Norms**
- Take care of ourselves: we remember to take a walk, have our lunch and coffee breaks, and take the time we need to feel better if we are sick.
- Similarly, we take the necessary time to take care of our loved ones when needed.
- Celebrate both our team’s and individual professional successes. Celebrate our team as a group of human beings and take each opportunity we can to celebrate personal successes and life milestones.
- Allow team members to agree with colleagues on individual ways of communicating.
- Seek to be flexible in our own approaches to best support colleagues.
Appendix II: Structures That Support Team Effectiveness

Organizational Foundation:

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<thead>
<tr>
<th>Risk-taking and vulnerability supported by leadership</th>
<th>Absent risk-taking and vulnerability supported by leadership:</th>
</tr>
</thead>
</table>
| “I have the ability to try new things and bring new ideas forward to the team. Vulnerability is not seen as a sign of weakness, but as an authentic part of doing hard work.” | Individuals  
• May not risk bringing new ideas to the table  
• May hold valuable information back or operate on “autopilot”  

The Team  
• May have low levels of trust  
• May have large gaps between what it espouses and how it behaves |

<table>
<thead>
<tr>
<th>Clear, challenging and consequential direction</th>
<th>Absent a clear, challenging and consequential direction</th>
</tr>
</thead>
</table>
| “I know what we are building together and, while that goal may be difficult to obtain, it is high value and even inspiring.” | Individuals  
• Will not have clear guidance for work prioritization  
• May lose interest/lack motivation to work hard  
• Will not know how to advance the work of organization  

The Team  
• Will have no basis for creating success metrics and will have no basis for improvement  
• May float along without accomplishing any high-quality work (or may produce haphazard and/or disconnected outputs) |
## Well-Defined Sandbox

<table>
<thead>
<tr>
<th>Role clarity</th>
<th>Absent role clarity:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I know what my job is and how it differs from others’ jobs.”</td>
<td>Individuals:</td>
</tr>
<tr>
<td></td>
<td>• lose sight of what is and is not their responsibility.</td>
</tr>
<tr>
<td></td>
<td>• May take less initiative, vie for attention, or become territorial (as a way to establish clarity)</td>
</tr>
<tr>
<td></td>
<td>• May take on more or less work than they should</td>
</tr>
<tr>
<td></td>
<td>The Team</td>
</tr>
<tr>
<td></td>
<td>• May see increased competition or complaints that things are unfair</td>
</tr>
<tr>
<td></td>
<td>• May not invest in the right skill development</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clear decision-making authority</th>
<th>Absent clear decision-making authority:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I know what decisions I have the authority to make and this authority empowers me.”</td>
<td>Individuals:</td>
</tr>
<tr>
<td></td>
<td>• may hesitate before making decisions,</td>
</tr>
<tr>
<td></td>
<td>• may default to their managers, or overstep their authority in ways that are not helpful to the organization</td>
</tr>
<tr>
<td></td>
<td>• May not inform or seek out feedback from others</td>
</tr>
<tr>
<td></td>
<td>• May get frustrated, feel micromanaged and/or stop taking responsibility for their work</td>
</tr>
<tr>
<td></td>
<td>The Team:</td>
</tr>
<tr>
<td></td>
<td>• May swing unpredictably between centralized and decentralized decision-making</td>
</tr>
<tr>
<td></td>
<td>• May not effectively tap the team’s expertise when a decision gets made</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clear task composition</th>
<th>Absent clear task composition:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I know what I’m supposed to be doing and what it looks like to be finished.”</td>
<td>Individuals:</td>
</tr>
<tr>
<td></td>
<td>• May sit idle</td>
</tr>
<tr>
<td></td>
<td>• May busy themselves with “urgent but not important” tasks.</td>
</tr>
<tr>
<td></td>
<td>The Team</td>
</tr>
<tr>
<td></td>
<td>• Surprises/conflict may arise where, for example, one person thinks something is done and another disagrees.</td>
</tr>
<tr>
<td></td>
<td>• May lack effective and coordinated planning</td>
</tr>
</tbody>
</table>
## Accountability Structures

<table>
<thead>
<tr>
<th>Clear metrics of success</th>
<th>Absent clear metrics of success:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I can clearly articulate when my work is and is not high quality - and others can, too.”</td>
<td>Individuals</td>
</tr>
<tr>
<td></td>
<td>• May not know how to tell if they are doing a good job and leaders lose the ability to evaluate them.</td>
</tr>
<tr>
<td></td>
<td>• May have a difficult time deciding where to dedicate their time (and thus default to easier/more urgent tasks)</td>
</tr>
<tr>
<td></td>
<td>The Team</td>
</tr>
<tr>
<td></td>
<td>• Projects may get done without a clear (or shared) understanding about their value</td>
</tr>
<tr>
<td></td>
<td>• Confusion may arise about how different projects are supporting overall mission of the organization</td>
</tr>
<tr>
<td></td>
<td>• May shift attention away from creating collective results</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transparency</th>
<th>Absent transparency:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Others can see what I am working on (and where it is going) and I can see what they are working on (and where it is going).”</td>
<td>Individuals</td>
</tr>
<tr>
<td></td>
<td>• lose track of what others are doing and how it relates to their work.</td>
</tr>
<tr>
<td></td>
<td>• Can hide from feedback and new ideas</td>
</tr>
<tr>
<td></td>
<td>The Team</td>
</tr>
<tr>
<td></td>
<td>• Surprises may crop up where differing expectations lead to confusion, disagreement or competence-threat</td>
</tr>
<tr>
<td></td>
<td>• May lose sight of the “big picture” and is less able to share relevant ideas</td>
</tr>
</tbody>
</table>

## Deliberate Learning Systems

<table>
<thead>
<tr>
<th>Formal and informal feedback structures</th>
<th>Absent feedback structures:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I regularly get information from others about the quality and impact of my behavior and my work.”</td>
<td>Individuals:</td>
</tr>
<tr>
<td></td>
<td>• Wonder (and make assumptions) about the impact of their behavior/work on others</td>
</tr>
<tr>
<td></td>
<td>• Lose meaningful opportunities to learn</td>
</tr>
<tr>
<td></td>
<td>The Team</td>
</tr>
<tr>
<td></td>
<td>• Cultivates limited trust, more caution, and lower psychological safety</td>
</tr>
<tr>
<td></td>
<td>• Produces suboptimal thinking with fewer ideas considered</td>
</tr>
<tr>
<td></td>
<td>• Finds general stagnation of behaviors and habits</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Absent challenge</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I am regularly pushed out of my comfort zone at”</td>
<td>Individuals</td>
</tr>
<tr>
<td></td>
<td>• Get bored.</td>
</tr>
<tr>
<td></td>
<td>• Lose the urgency to grow and learn</td>
</tr>
<tr>
<td></td>
<td>• Become territorial</td>
</tr>
<tr>
<td>Professional Learning</td>
<td>Absent professional learning</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------</td>
</tr>
</tbody>
</table>
| “I have formal opportunities to develop through training.” | Individuals:  
  - Stay in their roles too long or leave.  
  - Develop a narrow view of their capacity or future potential.  

The Team  
- Loses valuable members  
- Loses out on tapping into its people’s potential |

<table>
<thead>
<tr>
<th>Idea Sharing</th>
<th>Absent Idea-Sharing</th>
</tr>
</thead>
</table>
| “We deliberately share our insights, challenges and expertise.” | Individuals:  
  - Lose out on their team members’ expertise.  
  - Miss moments of inspiration or idea stimulation  

The Team  
- Loses track of what “it” knows.  
- Does not make the best use of its resources |

<table>
<thead>
<tr>
<th>Room for reflection</th>
<th>Absent room for reflection</th>
</tr>
</thead>
</table>
| “We take the time to reflect on our own performance and the team/organization performance on a regular basis.” | Individuals:  
  - Repeat the same behaviors again and again.  
  - People develop a narrow view of their work and their opportunities.  

The Team  
- Systems and norms stay static.  
- Loses the ability to adapt in a changing environment  
- May not make effective determinations about which activities are valuable and which are not |

**Systems for Working Together**

<table>
<thead>
<tr>
<th>Explicit norms and expectations</th>
<th>Absent norms and expectations:</th>
</tr>
</thead>
</table>
| “We know the expectations for how we work together and what it means to be accountable to those expectations.” | Individuals:  
  - May feel frustrated at others’ modes of working and producing  
  - May feel overlooked or overused  

The Team  
- May hold multiple (and likely conflicting) models of what good collaboration and contribution looks like  
- Has no way to hold team members accountable to their responsibilities to the team |
<table>
<thead>
<tr>
<th>Shared work products</th>
<th>Absent shared work products</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;We produce outputs together.&quot;</td>
<td><strong>Individuals:</strong></td>
</tr>
<tr>
<td></td>
<td>• Will not connect deeply to the work of others</td>
</tr>
<tr>
<td></td>
<td>• May form negative assumptions about the value and quality of others’ work</td>
</tr>
<tr>
<td></td>
<td><strong>The Team:</strong></td>
</tr>
<tr>
<td></td>
<td>• May trade off quality whenever entering a “sprint”</td>
</tr>
<tr>
<td></td>
<td>• Misses opportunities for feedback, information sharing and revision</td>
</tr>
<tr>
<td></td>
<td>• Stays siloed and misses crucial areas of overlap and mutual reinforcement</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Information Sharing</th>
<th>Absent Information Sharing:</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;We systematically share information with each other to enable effective coordination, idea-generation and collaboration.&quot;</td>
<td><strong>Individuals:</strong></td>
</tr>
<tr>
<td></td>
<td>• Lose out on opportunities to benefit from others’ experience</td>
</tr>
<tr>
<td></td>
<td>• May feel shut-out or disconnected</td>
</tr>
<tr>
<td></td>
<td>• Become less accountable to others in the organization</td>
</tr>
<tr>
<td></td>
<td><strong>The Team:</strong></td>
</tr>
<tr>
<td></td>
<td>• Becomes more siloed and less coordinated</td>
</tr>
<tr>
<td></td>
<td>• May fracture into like-minded groups who share information informally (leading to information asymmetry)</td>
</tr>
<tr>
<td></td>
<td>• May support overlap and doubling of work</td>
</tr>
<tr>
<td></td>
<td>• May lose out on valuable ideas and/or work solutions</td>
</tr>
</tbody>
</table>
Appendix III: TLA Team Interview Protocol

Objectives: 1) To understand the competencies that TLAers see as core to the work of the organization. 2) to understand how decisions are made on the team

Protocol:

Competencies

1. What led you to join TLA? What personal/professional challenges did you set for yourself? Now, looking back, what do you think you’ve developed the most? The least? What helped you develop?
2. What does it mean to be a successful member of the TLA team?
3. What factors motivate you to work hard (probe: autonomy, experimentation, predictability, recognition, mission, team, end-results for kids)
4. What are some capabilities that you want to develop. i.e. what are you working on?
5. To what extent does TLA help you develop those? How?
6. Is there feedback you’d like to be getting about your performance that you aren’t getting? Describe it.
7. What kinds of capabilities do you think the TLA team overall could use more of? Why are those important to the achieving the mission of the organization?

Ends/Means Decision-Making

For each key decision in the process of developing a project, tell me who you think has the authority to make this decision, who usually makes it and if that process is explicit.

<table>
<thead>
<tr>
<th></th>
<th>Authority to initiate</th>
<th>Usually initiates</th>
<th>Is this explicit?</th>
</tr>
</thead>
<tbody>
<tr>
<td>New project Idea</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project scope/stages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team composition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What success looks like</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course Corrections</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluating team’s performance on the project</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix IV: TLA Diagnostic Team Survey

Questions based on Likert scale (from TDS)
1 - Inaccurate
2 - Somewhat Inaccurate
3 - Somewhat Accurate
4 - Accurate
5 - Don’t Know

<table>
<thead>
<tr>
<th>Framework Category</th>
<th>Question Source</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Defined Sandbox:</strong></td>
<td></td>
</tr>
<tr>
<td>In general, I know which decisions I have the authority to make and which I do not</td>
<td>Original</td>
</tr>
<tr>
<td>My work projects usually have a clear beginning, middle and end.</td>
<td>Original</td>
</tr>
<tr>
<td>My projects have a clear end-date.</td>
<td>Original</td>
</tr>
<tr>
<td>I am often left wondering why certain decisions have been made</td>
<td>Original</td>
</tr>
<tr>
<td>It is hard to point specifically to my particular contribution to the organization’s work</td>
<td>Original</td>
</tr>
<tr>
<td>I am often kept in the dark about information that could affect my work plans</td>
<td>Original</td>
</tr>
<tr>
<td>I know what decisions others on the team have the authority to make</td>
<td>Original</td>
</tr>
<tr>
<td><strong>Learning Systems</strong></td>
<td></td>
</tr>
<tr>
<td>My work is so challenging that I often have to stretch myself to accomplish it</td>
<td>TDS (adapted)</td>
</tr>
<tr>
<td>My work is not especially challenging - achieving my tasks is well within my reach</td>
<td>TDS (adapted)</td>
</tr>
<tr>
<td>Technical training and support are available when I need them</td>
<td>TDS</td>
</tr>
<tr>
<td>This team adequately taps into the special knowledge and expertise of each member</td>
<td>TDS</td>
</tr>
<tr>
<td>This team often settles into habitual routines</td>
<td>TDS</td>
</tr>
<tr>
<td>I regularly have opportunities to help others develop personally and professionally</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>I am clear on my biggest areas of personal growth</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>I am clear on my biggest areas of professional growth</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>I have set goals with my manager about my biggest areas of personal growth</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>I have set goals with my manager about my biggest areas of professional growth</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>Others in the organization besides my manager are clear on my biggest areas of personal growth</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>Others in the organization besides my manager are clear on my biggest areas of professional growth</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>Part of my job is to help others in the organization develop personally and professionally</td>
<td>Kegan and Lahey (2016)</td>
</tr>
<tr>
<td>I sometimes avoid conflict in order to save time</td>
<td>Lencioni (2002)</td>
</tr>
<tr>
<td>During team meetings, the most important - and difficult - issues are put on the table to be resolved</td>
<td>Lencioni (2002)</td>
</tr>
<tr>
<td>At TLA, schedule pressure gets in the way of doing a good job</td>
<td>Garvin, Edmondson and Gino (2008)</td>
</tr>
<tr>
<td>At TLA, people are too busy to invest time in improvement</td>
<td>Garvin, Edmondson and Gino (2008)</td>
</tr>
<tr>
<td>Despite the workload, people in this organization find time to review how the work is going</td>
<td>Garvin, Edmondson and Gino (2008)</td>
</tr>
<tr>
<td>Our team is skilled at capturing the lessons that can be learned from our work experiences</td>
<td>Garvin, Edmondson and Gino (2008)</td>
</tr>
<tr>
<td>The members of this team have the necessary skills and experience to achieve our mission</td>
<td>Original</td>
</tr>
<tr>
<td>I feel like I have the required skills and/or experience to accomplish my work</td>
<td>Original</td>
</tr>
</tbody>
</table>

**Systems for Working Together**

| Members of this team rarely need to work with others in order to get their jobs done | TDS |
| Members of this team have to depend heavily on one another to get the team’s work done | TDS |
| When members of this organization have trouble working together, there is no one available to help them out | TDS |
| Some of our team members don’t carry their fair share of the overall workload | TDS |
| Working with others on the team is a “nice to have” but not a “need to have” to accomplish my own work at a high level | Original |
| I’d like to collaborate with others on the team more regularly than I do | Original |
| I think my work sometimes suffers as a result of insufficient collaboration with others on the team | Original |

**Accountability**

<p>| Carrying out our work tasks automatically generates trustworthy indicators of how we are doing | TDS |
| The work we do provides few trustworthy points of feedback about our team’s performance | TDS |
| The only way we can figure out how well we are performing is for other people in the organization to tell us | TDS |
| Members of this team agree about what high quality work looks like | TDS |
| Once completed, I can clearly articulate the extent to which my work has been successful | Original |</p>
<table>
<thead>
<tr>
<th>I am often unsure how to prioritize my various work tasks</th>
<th>Original</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand what my team members are working on well enough that I’d be able to explain it to someone outside the organization</td>
<td>Original</td>
</tr>
<tr>
<td>I have access to the information I’d need to deeply understand the purpose and activities of others’ work on the team</td>
<td>Original</td>
</tr>
<tr>
<td>I’d like more information about what my team members are working on and what will be produced as a result</td>
<td>Original</td>
</tr>
<tr>
<td>I often find myself doing lower quality work than I am capable of</td>
<td>Original</td>
</tr>
<tr>
<td>Team members call out one another’s deficiencies or unproductive behaviors</td>
<td>Lencioni</td>
</tr>
</tbody>
</table>

**Clear Direction**

The team’s purposes are specified so clearly that all members should know exactly what it exists to accomplish | TDS |
---|---|
As an organizational team, we do a whole, identifiable piece of work together | TDS |
Appendix V: Presentation to TLA Team, December 2017

Our Mission and Vision

TLA envisions a future where every child will have a highly effective, engaging, and equitable education that is personalized, informed by data, and mastery-based.

Blended learning, the strategic integration of in-person learning and technology, is a key mechanism for scaling personalization for every child in every school in our country.

Our mission is to catalyze the transformation American K-12 education through high-quality blended learning at scale.
Project Goals:

1. Clarify what strong performance means (for us as individuals and for us as a team)

2. Develop a team-based strategy for “building and flying” the space station (e.g. internal processes to enable success)

3. Build on TLAs strong culture and values (don’t mess with the good stuff)

What is At Stake?

1. Coherence: making sure that the work we are doing is mutually reinforcing

2. Not losing huge amounts of information if a team member leaves

3. Making sure we don’t inadvertently let informality prevent equity of practice

4. Not feeling like we are busying ourselves with work but not hitting the right targets

“[Start-ups] tend to view formal structures and processes...as bureaucratic threats to their entrepreneurial souls. They also worry about losing speed, control, and team intimacy. When they eschew order and discipline, however, they pay a steep price: chaotic operations and unpredictable performance.”

- Gulati and Desolanta (“Start-ups that Work”)
TLA 1.0 vs. TLA 2.0: Output Drives Working Structures

1.0 Targeted Investment
Solo-managed, targeted investments in key areas of the sector

2.0 Adaptive Learning Networks
Networks and communities of practice to strategically develop, test and share ideas across the sector

April 2017 Offsite:

Beth’s Open Question:
“We have moved from snorkeling to building a space station together. How do we build it together in mid-flight?”

Key Team Questions:
1. How will we know we are achieving our mission?
2. How do we clarify our decision-making processes?
3. What does team and individual success mean at TLA?
Logic of Project Flow

**RESEARCH**
- Culture and Organizational Practices Surveys
- Research teaming, organizational learning, virtual organizations, scaling start-ups
- Team Member Interviews and “Loop Backs”

**CREATE**
- Individual and Team Metrics of Success (e.g., competencies)
- Proposed structures for achieving those goals
- Iterative tests to figure out which structures work best

**DEFINE**
- Structures that enable us to reach our individual and organizational goals

---

Don’t We Already Get the Work Done?

“Our sets of activities, how we operationalize goals, that can get fuzzy. I kind of know how the work connects, but how do we know we’re making progress?”

“I’m on the R&D Team?”

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Q37: At TLA, schedule pressure gets in the way of doing a good job

<table>
<thead>
<tr>
<th>Competency</th>
<th>Strength</th>
<th>Mission-critical</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Take initiative</td>
<td><strong>4</strong></td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Flexible approach</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Think entrepreneurially</td>
<td>0</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Work collaboratively</td>
<td>0</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Communicate persuasively</td>
<td>0</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>“Do big”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Innovation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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Working as a Distributed Team

Small differences create pressures that split even the best functioning teams. What are the things we can be attentive of when working in a distributed team to alleviate some of those pressures?

Structure - what should the composition of the team look like
Process - what do we need to once we've assembled the team to keep it moving in the right direction
Learning - how do we increase learning and not suffocate it across different locations
Interaction - how do we see the balance of non-work and personal interaction with work-based interaction
Talk - how does communication plays out. It matters who says what, when.

Individual and Team Capabilities are Enabled by Organizational Structures

Defined Sandbox
(role clarity, decision-making authority, task composition)

Accountability Structures
(clear metrics of success, transparency)

Learning Systems
(Feedback, challenge, learning and reflection)

Systems for Working Together
(norms, shared work products, and information sharing)

Enabling organizational structures

Individual and team performance and growth

Risk-taking and vulnerability supported by leadership

Clear, challenging and consequential direction

Foundation
Individual and Team Capabilities are Enabled by Organizational Structures

- Defined Sandbox (role clarity, decision-making authority, task composition)
  - **Absent a Defined Sandbox:** People take less initiative or become territorial, may hesitate before making decisions or busy themselves with "urgent" but not "important" tasks.

- Accountability Structures (clear metrics of success, transparency)
  - **Absent Accountability Structures:** People may start to question the value of their own or others' work. People may lose track of what others are doing or lose sight of where the work is all headed.

- Learning Systems (feedback, challenge, learning and reflection)
  - **Absent Learning Systems:** People get bored or lose the urgency to stretch themselves. Team norms and systems stay static, even in times of transition.

- Systems for Working Together (norms, deliverables, and information sharing)
  - **Absent Systems for Working Together:** People may miss key areas of overlap and reinforcement. People may prioritize personal relationships over collective results.

- Enabling organizational structures
  - Individual and team performance and growth

- Absent risk-taking and vulnerability supported by leadership: Change and growth is not possible

- Absent a clear, challenging and consequential direction: It is difficult to know if you’ve succeeded or care about succeeding in the first place

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**Foundation | We Have Strong Psychological Safety**

- **"Our team feels like a family."**
- **"Because I made my fears clear and Beth allows me that space, we’ve been able to have really frank conversations. I’ve never had that space before. And it helps me trust my colleagues. Just the fact that you can do this project is evidence."**
- **"At my old job, the longer you work, the more you show off. Whereas at TLA if you say you worked until midnight they say, "Why? Go the fuck to sleep." The understanding of workplace balance is transparent and we talk about it."**

- **4. I can bring my “whole self” to work**
- **36. We have open and free expression of ideas, opinions and beliefs**

---

**Risk-taking and vulnerability supported by leadership**

**Clear, challenging and consequential direction**
**And a Consequential Mission**

- “Our mission is to catalyze the transformation American K-12 education through high-quality blended learning at scale.”
- “What ultimately made me join was that there was a social impact piece. It was for the greater good.”
- “My belief in our mission is my biggest fuel.”
- “The biggest thing is the “kids first” value and that it sits at the center of what we do. It’s what attracted me to the field in the first place. It connects me back to my own purpose. If I ever get distracted, I can say I’m working with these great people doing really important work.”

**How Do We All Pull Together in the Same Direction?**

- “We need more clarity around strategic goals and metrics of success. I’m not always sure why we’re doing what we choose to do.”
- “I’m not sure I WANT us to be doing a whole, identifiable piece of work together.”

- Risk-taking and vulnerability supported by leadership
- Clear, challenging and consequential direction
**Defined Sandbox**

**Enabling organizational structures**

- **Accountability Structures**
  - Clear metrics of success, transparency

- **Systems for Working Together**
  - Norms, deliverables, and information sharing

**Individual and team performance and growth**

**Risk-taking and vulnerability supported by leadership**

**Foundation**

**Clear, challenging and consequential direction**

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**We Are Skilled At Clarifying Roles and Tasks**

"I enjoy the autonomy of this team. I HATE being micromanaged. Knowing that I'm trusted to do the work I'm doing is really motivating."
**Defined Sandbox | But Our Decision-Making Structures Are Less Clear**

- "There’s a general lack of clarity for me around why things get decided the way they do."
- "There are certainly times I’ve made assumptions that who should be working on a project and it’s been vetoed. There’s never been a conversation about who gets to decide."
- "Our process for initiating projects isn’t explicit. I think that’s where a lot of the confusion lies."

**Q5 - I knew what decisions others on the team have the authority to make**

**Q6 - I am often left wondering why certain decisions have been made at TLA**

---

**Organizational Structures | Accountability Structures**

- **Defined Sandbox** (role clarity, decision-making authority, task composition)
- **Learning Systems** (feedback, challenge, learning and reflection)
- **Enabling organizational structures**
- **Individual and team performance and growth**
- **Accountability Structures** (clear metrics of success, transparency)
- **Systems for Working Together** (norms, deliverables, and information sharing)
- **Risk-taking and vulnerability supported by leadership**
- **Clear, challenging and consequential direction**

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Accountability Structures | Are We Accountable?

"It feels like some projects "seem" successful. Maybe not clearly defined, but deemed successful if it’s completed. And people agree that it’s useful. And then we hope it’s useful."

Q4A: Once completed, I can clearly articulate the extent to which my work has been successful.

Q4B: Giving self and our work tasks accountability generates trustworthy behaviors at least we are thinking.

Q4C: We hold ourselves and our team members accountable for results.

"I don’t think there’s great clarity on who has authority or standard operating procedure in terms of quality control. I think the last thing we do is go to the person who has done the poor work. We either go in and fix it ourselves or if it’s big we think, "Ugh, this is going to be fraught."

Accountability Structures | The Importance of Interpersonal Accountability

"An absence of accountability is an invitation to team members to shift their attention to areas other than collective results..."

...Team members who are particularly close to one another sometimes hesitate to hold one another accountable precisely because they fear jeopardizing a valuable personal relationship. Ironically, this only causes the relationship to deteriorate as team members begin to resent one another for not living up to expectations and for allowing the standards of the group to erode." - Patrick Lencioni

Learning Systems I We Have an Opportunity to Make Our Goals More Explicit

| The members of this team have the necessary skills and experience to achieve our mission |  |
| Part of my job is to help others in the organization develop personally and professionally |  |
| This team adequately taps into the special knowledge and expertise of each member |  |
| I feel that I have the required skills and/or experience to accomplish my work |  |
| I have set goals with my manager about my biggest areas of professional growth |  |
| My work is so challenging that I often have to stretch myself to accomplish it |  |
| Technical training and support are available when I need them |  |
| I regularly have opportunities to help others develop personally and professionally |  |
| I have set goals with my manager about my biggest areas of personal growth |  |

| I am clear on my biggest areas of personal growth |  |
| I am clear on my biggest areas of professional growth |  |
| Our team is skilled at capturing the lessons that can be learned from our work experiences |  |
| Others in the organization besides my manager are clear on my biggest areas of personal growth |  |
| Others in the organization besides my manager are clear on my biggest areas of professional growth |  |

<table>
<thead>
<tr>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Somewhat Inaccurate</td>
<td>Somewhat Accurate</td>
<td>Accurate</td>
<td>I don't know</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Learning Systems | We Are Challenged and Developing in Our Roles

“To be successful at TLA you need to take ownership of what you’re doing. You need to be confident in what you’re doing. The times I don’t feel successful is when I take a step back and let someone else do it.”

“I’m learning on the job. I feel like I’m being groomed. I don’t come in with that capacity. I appreciate those opportunities to present to the team or publicly...those things scare me to death.”

“There was a super steep learning curve around blended learning and the content side of it when I started. I feel like I’ve accomplished all my goals deeply. I still shy away from saying I’m a blended learning expert, but I probably am.”

“Owning more decision-making is scary, too. Because you own it. Personally, for me, it was about stepping into more strategic thinking. I like to push my skill level forward and I felt I could do that at TLA.”

Learning Systems | We Lack Systems for Giving Each Other Feedback Beyond Work Products

“I think everyone is open to feedback but because there aren’t explicit structures it doesn’t happen. I think it would be helpful to have both downward and upward feedback. Beth has never given me the impression that she doesn’t want feedback.”

“I feel like I can freely provide feedback to my colleagues

31. I feel like I receive feedback from my colleagues on a regular basis

32. I feel like I receive feedback from my colleagues on a regular basis
Organizational Structures | Systems for Working Together

- Defined Sandbox (role clarity, decision-making authority, task composition)
- Accountability Structures (clear metrics of success, transparency)
- Learning Systems (feedback, challenge, learning and reflection)
- Systems for Working Together (norms, deliverables, and information sharing)

Individual and team performance and growth

Risk-taking and vulnerability supported by leadership

Clear, challenging and consequential direction

Systems for Working Together | “Collaboration” Has Multiple Meanings and Associations at TLA

“I don’t think it’s lack of strategy that makes it hard for us to collaborate. I think it’s lack of processes. We keep going around in circles setting goals, but we don’t have clear systems for working together to advance them.”

“I don’t think it’s autonomy that motivates me. I really like it when there are team processes that happen together where I can motivate them and they can motivate me.”

“I think my work sometimes suffers as a result of insufficient collaboration with others on the team.”

Q20 - ‘I think my work sometimes suffers as a result of insufficient collaboration with others on the team’

Q24 - ‘I’d like to collaborate with others on the team more regularly than I do’

[Bar charts showing data]
Systems for Working Together | Where Does the “Work” Happen?

Q29: During team meetings, the most important and difficult issues are put on the table to be resolved.

<table>
<thead>
<tr>
<th>Issue</th>
<th># of full team meetings (End of July-December)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intense</td>
<td>18</td>
</tr>
<tr>
<td>Somewhat inaccessible</td>
<td></td>
</tr>
<tr>
<td>Somewhat inaccessible</td>
<td></td>
</tr>
<tr>
<td>Important</td>
<td></td>
</tr>
<tr>
<td>I don’t know</td>
<td></td>
</tr>
<tr>
<td>“Team Hours” spent meeting</td>
<td>236</td>
</tr>
<tr>
<td>% Reporting in and info sharing</td>
<td>78%</td>
</tr>
<tr>
<td>(e.g., relationship update)</td>
<td></td>
</tr>
<tr>
<td>% Discussing (e.g., article discussion)</td>
<td>18%</td>
</tr>
<tr>
<td>% Making decisions together (e.g., more</td>
<td>3%</td>
</tr>
<tr>
<td>postcards?)</td>
<td></td>
</tr>
<tr>
<td>% Problem-solving together</td>
<td>0%</td>
</tr>
</tbody>
</table>

“Intensity” Pattern for Effective Virtual Teams

- Intense, longer problem-solving meetings (preferably 2+)
- Shorter, light-touch meetings

Key Takeaways:

Our Strengths:
- We have the flexibility to set our own metrics of success and shift as our environment changes
- High psychological safety and high levels of caring (both about each other and the organization as a whole)
- Task and job clarity
- High opportunities for learning

Our Challenges:
- Creating explicit mechanisms for growth and development
- Accountability (to link our activities to our mission and know what success really means)
- Robust systems for working together (getting beyond the “report in”)
- Establishing clear decision-making processes

Action Steps:

<table>
<thead>
<tr>
<th>GOALS</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarify what strong performance means (for us as individuals and for us as a team)</td>
<td>- Define individual and team competencies (Done)</td>
</tr>
<tr>
<td></td>
<td>- Create an explicit definition for “quality work”</td>
</tr>
<tr>
<td></td>
<td>- Bring individual measures of success into PCFs (In process)</td>
</tr>
<tr>
<td></td>
<td>- Communicate joint organizational objectives (emerging from individual PCFs)</td>
</tr>
<tr>
<td></td>
<td>- Define compelling organizational metrics of success</td>
</tr>
<tr>
<td>Develop a team-based strategy for “building and flying” the space station (e.g. internal processes to enable success)</td>
<td>- Do an inventory of team structures against our areas of strength/weaknesses (Done)</td>
</tr>
<tr>
<td></td>
<td>- Pilot structures to enable: 1) Clearer decision-making protocols, 2) Better information sharing, 3) Higher quality collaboration (In Progress)</td>
</tr>
<tr>
<td></td>
<td>- Choose the structures that work best for the team</td>
</tr>
<tr>
<td>Build on TLAs strong culture and values (don’t mess with the good stuff)</td>
<td>Take care not to “bureaucratize” TLA Build competencies out of values (Done)</td>
</tr>
</tbody>
</table>
Appendix VI: TLA Competencies

TLA Competencies Fact Sheet:

1. **What are competencies?** Competencies are observable skills and attributes that help people succeed in their work at TLA and, ultimately, lead to organizational success. The competencies are the expression of what TLA means by “high quality performance.”

2. **Where did these come from?** Through team interviews, we drew out specific skills that we felt best operationalized our values. We also consulted with other like-minded organizations and did background research into competency development to help us broaden and reinforce our thinking.

3. **What are these meant to accomplish?** While TLA is a “small but mighty” organization, we have high standards and know that the quality of our work must be high in order to accomplish our mission. Identifying specific competencies not only enables us to live our values, but it also sets specific, achievable targets for individual growth and development.

4. **How will we use them?** We all engage in two performance conversations each year that act as spaces of reflection, feedback, and planning. These competencies are meant to help people identify particular areas of strength and growth as they set their performance and growth goals. We will also use these competencies in future hiring processes to ensure a competency match with potential hires. Finally, these competencies are a way to further communicate our values to those outside the organization.

---

**TLA: Who We Are and What We Believe**

**We are thought leaders...** We create new connections in the sector, launch ideas to push thinking, and use our networks to link together people and ideas that would otherwise stay separate.

**...who act boldly and transparently.** We are data driven, but we do not wait for perfect information to take action. We share our work early and often with one another and are transparent about our challenges. We believe that we learn more by producing work than by talk alone.

**We are versatile specialists...** While we all embody different areas of expertise, we are willing to pitch in when needed, take on leadership roles, learn new areas of content and apply ourselves in new ways in order to get the work done.

**...working with humility.** Our first duty is to the students we serve, not our own egos. We do not compete with one another but instead we place our trust and our compassion with our team members and work together to maximize our impact.
**Urgency**

**Decisive:** We are able to make difficult decisions in a timely manner.

**Proactive:** We identify what needs to be done and take initiative, doing it before being asked or before the situation requires it.

**Short-cycle oriented:** We are able to rapid-prototype: we put ideas on the table quickly and run low-cost experiments in order to iterate and improve.

**Fast-paced:** we set ambitious deadlines and agree that good is sometimes better than perfect. We are not afraid of working fast.

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**Equity**

**Committed to Equity:** We share a demonstrated commitment to equity both in the projects we undertake and within the organizational structures we create.

**Community Driven:** We learn from 1) the practitioners in the sector and 2) the community members and students they serve.

**Inclusive:** We share a commitment to see each person as an individual without making assumptions based on race, gender, nationality or other group identifier.

**Diversity Driven:** We act from the conviction that the best innovation emerges from a diversity of perspectives (thought), backgrounds, and experiences, even when it means challenging our own perspectives.
**Bold Ideas and Action**

**Think Entrepreneurially:** We can look past "what is" to imagine and execute against a vision for the future. We identify ways to leverage resources outside of our direct control to achieve our goals.

**Think Strategically:** We use data, analysis, and synthesis to identify problems, articulate solutions, and prepare for and mitigate risks to execute against plan.

**Communicate Persuasively:** We plan and deliver written and verbal communications that make an impact and persuade their intended audiences.

**Go Big:** We imagine bold ideas, have faith in our ability to achieve them, and muster the courage to go after them.

---

**Collective Intelligence and Impact**

**Collaborate:** We prioritize what is best for the team above own personal gain. We work cooperatively with others and engage others regularly our work.

**Diversity Driven:** We act from the conviction that the best innovation emerges from a diversity of perspectives (thought), backgrounds, and experiences, even when it means challenging our own perspectives.

**Build partnerships:** We develop, maintain, and strengthen partnerships with others inside and outside the organization to foster mutual assistance and support.

**Leverage expertise:** We have, and are committed to further developing, expertise in the content areas associated with our work. We share that expertise daily with others inside and outside of the organization.
**Accountability**

**Transparent:** We share our work and our expectations early and often in a way that others can make sense of and/or use.

**Accountable:** We hold ourselves accountable to high standards of work, ensuring that our work is complete and accurate. We check in with others to ensure that agreements and commitments have been fulfilled.

**Responsive:** We react quickly and professionally to both internal and external requests.

---

**Continuous Improvement and Persistence**

**Growth Invested:** We invest in the development of ourselves and others on the team. We prioritize development of team members by naming and not “smoothing over” challenges as they arise.

**Reflective:** We take the time to evaluate our individual and collective work output and figure out what improvements can be made in the future.

**Feedback seeking:** We actively solicit feedback on the value of our work products and the impact of our actions.

**Resilient:** We don’t let setbacks and uncertainty prevent us from moving forward and trying something new, and we are able to see opportunity in ambiguity.
**Honesty, Trust, Respect**

**Approach others with Curiosity:** We approach conflict with kindness and interest in others’ perspectives. We ask others about their intentions, rather than assuming we know.

**Cultivate Credibility:** We care about being responsible, reliable, and trustworthy and work to cultivate that reputation.

**Vulnerable:** We are willing to be uncertain, take risks, and expose our emotions in service of our team and mission.

**Trust the team:** We trust in our team members’ abilities to accomplish our shared goals. We demonstrate that trust by 1) sharing work tasks 2) being open about challenges and 3) honoring different working styles.

---

**Fun and Flexibility**

**Flexible:** We are open to different and new ways of doing things; we are willing to modify our preferred way of doing things.

**Keep Perspective:** We can laugh at our own mistakes and challenges: We play the “long game.”

**Self-knowledgeable:** We know what we individually need to get our work done and can ask for it.

**Resilient:** We don’t let setbacks and uncertainty prevent us from moving forward and trying something new, and we are able to see opportunity in ambiguity.
Sources

These were largely drawn from interviews with the TLA team. Other sources include:

Model: Hewlett Packard Learning Competencies
Model: CASL Competencies
Model: Character Lab Growth Card
Model: Innovation Competency Model
Model: NYC Department of ED School Leader Competencies
Model: U.S. Office of Personnel Management
Book: Leading the Learning Organization: Communication and competencies for managing change
Article: Building Competency Models: Approaches for HR Professionals
Literature Review: Understanding Competencies and Competency Modeling—A Literature Survey
Article: Recruiting Teachers for Personalized, Competency-based Schools
Article: The Value Added Employee: 31 Skills to Make Yourself Irresistible to Any Company

Organizational Competencies Consulted
1. Transcend
2. KIPP
3. New Profit
4. Education First

Also, big thanks to Beth’s Ed.D. Capstone!
Appendix VII: TLA Competency Conversation Pre-work

To be completed for our team meeting on Tuesday, November 14, 2017

(Please read through these definitions before doing the activity, as it will clarify what these all mean. Base your answers on your view of TLA at its best.)

1. From the list below, what are our team’s core existing competency strengths? (i.e. what do we currently do really well?) These should reflect where we are currently strong, which may or may not correspond to where you think we should be. Choose between 5 and 7.

Put a GREEN STAR (*) beside the ones you choose.

2. Now choose 5-7 competencies that you feel are mission critical for all TLAers to cultivate. These should be “table-stakes” for anyone being hired into the organization. (Note: they may or may not correspond to the ones you selected above.)

Mark these with a BLUE ARROW (⇧).

3. Finally, choose a few competencies that you think we are generally weak on as a team. Choose no fewer than 3 and no more than 5.

Put a RED MINUS (-) next to those competencies.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Strength</th>
<th>Mission-critical</th>
<th>Weakness</th>
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</thead>
<tbody>
<tr>
<td>Decisive</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Take initiative</td>
<td>****</td>
<td>⬆ATTRIBUTE</td>
<td></td>
</tr>
<tr>
<td>Short-cycle oriented</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Think entrepreneurally</td>
<td>*</td>
<td>⬆ATTRIBUTE</td>
<td></td>
</tr>
<tr>
<td>Think strategically</td>
<td>*</td>
<td>⬆ATTRIBUTE</td>
<td></td>
</tr>
<tr>
<td>Communicate persuasively</td>
<td>****</td>
<td>⬆ATTRIBUTE</td>
<td></td>
</tr>
<tr>
<td>“Go big”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collaborate</td>
<td></td>
<td>⬆ATTRIBUTE</td>
<td></td>
</tr>
<tr>
<td>Seek ideas</td>
<td>*</td>
<td>⬆ATTRIBUTE</td>
<td></td>
</tr>
<tr>
<td>Build partnerships</td>
<td>****</td>
<td>⬆ATTRIBUTE</td>
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<tr>
<td>Leverage expertise</td>
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<tr>
<td>Transparent</td>
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<td>✡</td>
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<td>★★★</td>
<td></td>
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<tr>
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<td>✡</td>
<td></td>
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<td>★★★</td>
<td></td>
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<tr>
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<tr>
<td>Inclusive</td>
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<td>★★★</td>
<td></td>
</tr>
<tr>
<td>Diversity driven</td>
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<td>♦</td>
<td></td>
</tr>
<tr>
<td>Feedback seeking</td>
<td>★★</td>
<td>♦</td>
<td></td>
</tr>
<tr>
<td>Resilient</td>
<td>*</td>
<td>★★★</td>
<td></td>
</tr>
<tr>
<td>Cultivate credibility</td>
<td>★★★</td>
<td>★★★</td>
<td></td>
</tr>
<tr>
<td>Vulnerable</td>
<td></td>
<td></td>
<td>-</td>
</tr>
<tr>
<td>Trust the team</td>
<td>★★★</td>
<td>★★★★★</td>
<td></td>
</tr>
<tr>
<td>Start with why</td>
<td>♦</td>
<td></td>
<td>-</td>
</tr>
<tr>
<td>Flexible</td>
<td>★★★★★</td>
<td>★★★★★</td>
<td></td>
</tr>
<tr>
<td>Keep perspective</td>
<td>★★★</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-knowledgeable</td>
<td>★★</td>
<td></td>
<td></td>
</tr>
<tr>
<td>See opportunity in ambiguity</td>
<td>★★</td>
<td>♦</td>
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</table>
Appendix VIII: Accountability Partner Protocol

WELCOME ACCOUNTABILITY PARTNERS!
Everything you need to know about the testing process*

What Is an Accountability Partner?
While we are all well-intentioned, the day-to-day business of life can get in the way of 1) making steady progress on personal goals we have for our own development and 2) reflecting on things that have happened in the course of our working lives that can serve as good sources of learning. Your accountability partner is someone who gives you an extra boost to help you accomplish your goals, provides a “home base” for your personal reflections, and, with permission, pushes your thinking. The purpose of accountability partners is to give you a rich support for things YOU want to do. They are cheerleaders who listen more than talk, ask questions rather than offer advice, and keep an eye and ear out on your behalf even when you are not in a 1:1 meeting.

Why Is This Important for TLA?
One of the most consistent requests from TLAers is for more/richer/consistent feedback systems. Both in the culture survey, and in the follow up work on team structures, we found that these kinds of structures are inconsistent at TLA. We have also discovered that we are a largely conflict avoidant group (although not entirely), so interpersonal feedback does not always happen naturally. Yet, many organizational researchers have focused on the importance of individual growth and development on teams. When people feel like they aren’t developing, they get bored or overly comfortable, fail to productively challenge themselves and, eventually, either settle into mindless routines or leave to find other work. Prioritizing people development also means your work team is continually improving, which makes organizational success more likely to achieve. It allows for strong internal promotion and better team cohesion. Finally, having people who know you better and care about your development is a benefit in and of itself.

How Should I Choose My Growth Area?
Your growth goals should be meaty enough that you care deeply about working on them, but contained enough that you can tell if you’re making progress. For example, “Learn Excel” is not meaty enough, even though it might be an ambition of yours, because it doesn’t
touch widely enough on your personal or professional development. “Become a better person” is far too big (how would you know if you did?). Growth goals sound more like, “Develop my capacity to listen more than speak in team meetings,” “Share my work earlier and solicit feedback, even if I’m not yet proud of the work.” or “Share what I’m thinking in my head out loud, instead of keeping it to myself.”

Each of the examples above correspond to one or more of TLA’s team competencies. We recommend that you look at the competencies and select 2-3 that resonate strongly with you as areas you’d like to develop. By bringing the competencies into your accountability partner conversation, you not only ensure that your development benefits you, but also that it benefits the organization as a whole.

Should Accountability Partners be my Close Friend?
Not necessarily. In fact, people who start out friends often have a hard time adopting an AP relationship because they find themselves continually slipping into their “friend speak” that includes chatting about other things in their lives or venting about their day. These are important conversations, too, but different from the role of an AP. Given the structured nature of the AP role, people don’t have to be the same age or have the same issues or experience to be excellent supports for one-another.

How Will This Testing Process Work?
There are two pairs of accountability partners for this test. Each pair will meet three times, over the course of 6 weeks, for one hour. If you like, these meetings can take the place of your normal 1:1, but the hour should be sacred (i.e. don’t try to do the AP work quickly and then move on to other topics). At the end of six weeks, we’ll invite you to share your reflections about the process with the rest of the team, including: what worked and what didn’t, what you learned, what advice you have about the process going forward, etc.

Because we want the test to be somewhat rigorous, if not entirely scientific, we have created a conversation protocol for partners to follow. The protocols will create some consistency between partner pairs, which will give us better data. They will also hopefully be helpful, especially at the outset, to avoid the “what should we do now?” “Mmm...not sure” conversation.

Below you will find the conversation protocols for the three “testing” conversations. Please keep a running written record of notes from your conversations. These will not be publically shared, but they will help us gather better feedback from you.

Any other questions? Contact Ellie or Michela.
Happy Testing!
Accountability Partner Meeting #1  
(60 mins)

15 minute pre-work:
Come to the first conversation having:
• Read over the questions below and give them a few minutes of thought.
• Looked at the TLA competencies and chosen 2-3 that you would like to work on. Spend 10 minutes reflecting on why these matter to you.

Conversation Protocol
These questions are just prompts. For a few numbered items, we have asked a question multiple ways (because people’s brains work differently). It’s fine to just pick one and run with it. Do take the time to hit each number, don’t feel the need to answer each individual question.

1. What do we each want to get out of this partnership? What does success mean for each of us? (i.e. what are we each doing here?) (suggested time: 10 mins)

2. In order for me to feel really comfortable with this process, I’d need____________, because_________.  
   (Suggested time: 3-4 mins each)

3. What are some structures or norms that will help us reach our goals? (e.g. what commitments might we make to each other? Meeting norms? Actions in between our meetings? What does it mean to prepare for a meeting?) Discuss: How will we track our goals and our conversations?  
   (Suggested time: 10 mins)

*Note* Questions 2+3 can be combined, if that makes more sense for your process.

4. For each partner in turn:  
   a. **Partner A**: Share which competencies you chose and explain why you chose them.
   b. **Partner B**: (some possible question prompts)  
      i. Why are these (is this) important to you?
      ii. Tell me more about…
      iii. What would growth in these areas look like for you?
      iv. What is one step you could take and tell me about next time?

(Then switch roles - suggested time, 12 mins per partner or 24 mins total)

5. +/- and Next Steps:  
   a. What worked well for us during this hour? What would we like to do differently next time?
   b. What would we like our next steps to be?

   (Suggested time 5-6 minutes)
Accountability Partner Meeting #2
(60 mins)

1. **Settling in.** Share with your partner one triumph of the past week and one place where you weren’t successful.
   *(Suggested time: 5-10 mins)*

2. **Focus on Partner A:**
   a. Is there anything specific on your mind you want to talk about?
      b. In what way has your goal (have your goals) been relevant in the past two weeks?
      c. Why is that important for you?
      d. What is one specific goal you’d like to set for the next two weeks?
      e. How can I be helpful in supporting you in that goal?

   *(Note* don’t let your partner tell you “nothing.” There is always some way we can support each other’s development. Feel free to offer some suggestions or just wait until they suggest something themselves.)*
   *(Suggested time: 20 mins)*

3. **Switch Roles and Focus on Partner B.** (Same as above)
   *(Suggested time: 20 mins)*

4. Decide together how (and where) you will keep track of your goals and progress *(if you have not already)*
   *(Suggested time: 5 mins)*

5. What worked well for us during this hour? What would we like to do differently next time?
   *(Suggested time: 5 mins)*
Accountability Partner Meeting #3
(60 mins)

1. **Settling in.** Share with your partner one funny story from your childhood that has become part of your family “lore” or that still makes you laugh.

*(Suggested time: 5-10 mins)*

2. **Focus on Partner A:**
   a. Is there anything specific on your mind you want to talk about?
   b. Last time you set a goal of __________, How did that go? (Tell me more about…)
   c. If it went well, why do you think it went well? If it didn’t go well, why do you think it didn’t go well?
   d. In terms of your goal, what do you want to accomplish in the next two weeks?
   e. How can I be helpful in supporting you?

   *(Note* Again, don’t let your partner tell you “nothing.” There is always some way we can support each other’s development. Feel free to offer some suggestions or just wait until they suggest something themselves.)

*(Suggested time: 20 mins)*

3. **Switch Roles and Focus on Partner B.** (Same as above)
   *(Suggested time: 20 mins)*

4. **Reflect together:** Overall, how is this process working for us? What has been surprising (in good or not good ways)? What recommendations would we make to the TLA team if others were going to do this?

*(Suggested time: 10 mins)
Appendix IX: Selected Think Tank Findings, Fall 2017

**A Framework for Supportive Ecosystems**

Leaders Navigate Four Critical Areas to Enact Change

As leaders pursue change (innovation, adoption, implementation), they report supports and challenges in key areas.

<table>
<thead>
<tr>
<th>Area</th>
<th>Definition</th>
<th>Factors cited</th>
</tr>
</thead>
</table>
| Legitimacy and Investment | Organizations, people, and policies that create legitimacy and support for work (resources: time, $, people, support). Define – intentionally or unintentionally – “rules of the game” that open up or constrain approaches. | * District policy and structures  
* Funder beliefs, strategies, grants  
* Community perceptions  
* Metrics for accountability |
| Personal Leadership   | Resources leaders turn to to support their own learning and development in order to design, lead, and sustain change. | * Leadership coaching  
* Other administrators  
* Learning networks  
* Improvement processes |
| School Capacity       | The levers, resources, and conditions that exist within a leader’s own institution. These include people, processes, tools, and structures a leader calls on or builds as they lead and sustain change. | * Current approach/baseline  
* Existing human capital (teachers, students, flexibility)  
* Infrastructure |
| External Supports     | The external partners and resources outside of the formal institution (school, managing network) a leader turns to for help and additional capacity. | * Service partners and technical assistance networks  
* Tools and curriculum  
* Human capital pipelines |

**Lopsided Investment in Innovation Rather Than Transformation**

Leaders face a “cliff” in support once they move beyond initial redesign

Leaders are engaged in the task of school transformation. At initial stages, the focus is on innovation, but as the work progressed they shift greater emphasis to continuous improvement and learning.

However, supports, grants and funder-created programs are currently heavily weighted to the beginning of the transformation experience. Leaders report significant opportunities to participate in design opportunities as well as to access initial funds. They later feel starved for resources (dollars, people, time, network access) just as the work gets really hard. Metaphorically speaking, we (funders, supporters) are taking away the oxygen just as leaders and school teams reach heights where they need it most.

As existing blended and personalized leaders develop, and later adopters seek to bring innovations into their own schools, supporters must correct this imbalance.

<table>
<thead>
<tr>
<th>Early Supports for Innovation and Design (Maintain/Replicate)</th>
<th>Later Stage Investments Needed for Learning and Growth (Must Identify/Build)</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Design fellowships with teams</td>
<td>* Networks for learning new ideas, co-problem solving</td>
</tr>
</tbody>
</table>
| * Consultants to support planning/implementation              | * “Small bets” investments to support:  
- dedicated BL/PL staffing  
- teacher/staff release time  
- resources to enable sharing/codification                       |
| * Start-up grants (though they need not be large – leaders would prefer sustained support) | * Quality open materials for sharing/dissemination                           |
Lack of Measurement Clarity and Capacity
Leaders need better metrics, including those for “apples to apples” learning

Schools lack resources and clarity on what and how to measure, as well as how to know if outputs and outcomes are indicative of success.

This measurement challenge is certainly true within accountability contexts – many report that they are being asked to shift to more innovative approaches but that state/district aligned metrics have not done the same.

Perhaps more importantly, leaders struggle to measure for the purposes of learning. The lack of commons measures – particularly in non-academic areas – is as a major hindrance to quality, sharing, and the building of an evidence base.

- Absent common metrics, leaders struggle to know whether or not their work is successful or how to gauge, and when to potentially adopt, the practices of others.
- Leaders want more guidance on:
  - what they should measure
  - how to measure it
  - how to know when they are seeing success
- They also want more capacity to do it

The field must begin to agree on and identify, at the regional but also national level, a few common metrics of success. Further, we must invest in connecting schools with support for ongoing implementation measurement. (* See appendix for TLA’s measurement viewpoint.)

Leadership Support Void
Major gaps (and opportunities) in leadership pipelines, support, and networking

While there are some resources to turn to to support design processes, leaders at the school and program (BL/PL director) levels are under-networked, under-supported, and generally left on their own to identify personal support and development.

There is a clear argument to be made to purposefully network and develop these leaders:

1- Leaders express strong desire to participate in and report great value from national and regional networking (including getting to be change agents within region). Most must rely on informal networks (such as Twitter) and conferences to sustain their learning and growth.

2- Leaders are likely the best disseminators of knowledge and builders of buy-in within regions. (The top resource for their learning was reported as “other leaders.”)

3- Absent networks, leaders are reinventing the wheel and not gaining access to knowledge and energy to sustain their work. A lack of support and peer-to-peer engagement contributes to burnout and fatigue.

The field must tap into mechanisms for networked leadership support as a means for accelerating our work.