



Creating coherent systems of data collection and analysis : a case study in the collection, analysis, and use of client feedback data at Expeditionary Learning

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Creating coherent systems of data collection and analysis: A case study in the collection, analysis, and use of client feedback data at Expeditionary Learning

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

Submitted by

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Abstract

Mission-driven organizations that want to remain innovative and continue to grow their share in the education sector need to embrace change, seize opportunities for improvement, and commit themselves to consistent and continual learning and growth. Such a commitment to improvement and to consistent and continual learning relies on the development of coherent, unified systems to collect, analyze, use, and respond to data coming from multiple facets of the organization. This capstone explores how one organization, Expeditionary Learning (EL), desiring to become a more data-driven organization, sought to strengthen its data collection and analysis mechanisms, specifically focusing on feedback and satisfaction data from its clients.

Expeditionary Learning is experiencing a period of tremendous growth and change marked by new opportunities to pursue and refine mission-aligned business. With this growth, comes a need to systematize and organize many aspects of the organization, including structures and processes for collecting, analyzing, and responding to data regarding client experiences and client satisfaction. As the majority of EL's work is client facing, gathering data from these clients with regards to their experiences with EL is crucial to ensuring needs of clients are met and ultimate outcomes of impacting teacher practice and student achievement are reached.

This capstone begins with a historical and contextual background of Expeditionary Learning and places this particular strategic project within that context. Next, literature is examined related to improvement processes, customer satisfaction, and implementing organizational change, providing a rich research base from which the project and its implementation was conceptualized. The project work that occurred

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between July 2013 and April 2104 is described and analyzed. The analysis emphasizes the need to consider the technical and adaptive aspects of implementing organizational change. Finally, the capstone concludes with reflections on the research and the implementation of the project. These reflections also provide potential implications for the author, for Expeditionary Learning, and for the education sector.

Introduction

Expeditionary Learning (EL), a non-profit chartered entity of Outward Bound, began, in 1991, when the New American Schools Development Corporation issued a call for proposals for comprehensive “break the mold” school models to improve achievement in the nation’s lowest performing schools. In response to this call for proposals, Outward Bound organized a team comprised of members of the Harvard Outward Bound Project¹, Harvard University professors, and members of organizations such as Project Adventure, Facing History and Ourselves, and the Technical Education Research Center. This group came together as a design team and wrote a proposal for Expeditionary Learning. In 1992, the New American Schools Development Corporation awarded \$9 million in grant funding to Expeditionary Learning, selecting the proposal submitted by the aforementioned collaborative design team (EL History Timeline, Internal Document, 2013²).

Over the course of twenty years, EL has gone from a small system of 10 demonstration schools in five cities³ to an organization boasting a nation-wide network comprising more than 165 schools spanning rural to urban settings and serving students in grades pre-K through 12; a growing portfolio of revenue streams including a comprehensive suite of professional development and coaching, Common Core aligned

¹ The Harvard Outward Bound Project was a group started in 1987 to raise the profile of experiential education at the Harvard Graduate School of Education while also increasing the level of academic rigor present in Outward Bound schools

² To view the entire Expeditionary Learning History Timeline, see Appendix A

³ In 1992 when the New American Schools Development Corporation awarded \$9 million in grant funding to Expeditionary Learning it selected its model from among 800 applicants. By 1993 ten demonstration schools in five cities including New York, Boston, Denver, Portland, and Dubuque, signed on to partner with Expeditionary Learning.

curriculum, publications, and online tools; a diverse and geographically dispersed staff of 90; and a clear mission and vision to affect change in American public education.

Design Principles

In 1992, when the New American Schools Development Corporation awarded grant funding to Expeditionary Learning, it was based off of a proposal listing ten design principles, which outlined what would distinguish this model from other school reform models, and the principles of the International Baccalaureate (IB) program, which outlined the approach to academics within this newly proposed model. While the tenets of the IB program do not remain exactly true in today's EL model, the ten design principles have endured through EL's twenty-year tenure. These design principles, rooted in the work of Kurt Hahn and his Seven Laws of Salem, Project Adventure, and Eleanor Duckworth and the Harvard Outward Bound Project, are:

1. The Primacy of Self-Discovery
2. The Having of Wonderful Ideas
3. The Responsibility for Learning
4. Empathy and Caring
5. Success and Failure
6. Collaboration and Competition
7. Diversity and Inclusion
8. The Natural World
9. Solitude and Reflection
10. Service and Compassion (Expeditionary Learning Core Practices Benchmark Book, 2011)

These ten design principles lie at the heart of the Expeditionary Learning model and serve as a guide for its work (Cousins, 1998; Cousins, 2000).

Recent Growth and Change

For much of its twenty-year tenure, EL has been a relatively small-scale organization, with minimal centralized oversight, relatively sparse organization wide systems and processes, and a hold on a small market share in the education sector. In 2009, as EL found itself confronting major challenges specifically regarding revenue generated and operating budget, the organization needed to develop a plan to become a financially sustainable and tenable entity. The root causes of these challenges lied in a historic over reliance on single, major funding sources; a limited pipeline of donors and lack of diversity in funding sources; a lack of capacity to handle the aforementioned challenges; limited to no credible, experimental evidence of success and impact; and a staff culture focused on implementation of the design principles and the model, rather than increased student achievement and outcomes, as the ultimate goal (Internal Document: Stepping Up, A Four Year Strategic Budget Plan, 2011). Thus, the drafting of a four-year strategic plan (see EL 4-Year Strategic Pillars in Appendix B), dated from 2011-2015, outlining 5 strategic pillars as drivers and focus areas for work, became a necessary task.

The fifth pillar of this plan “Diversify and grow both earned fee and philanthropic revenue streams,” (Expeditionary Learning 4-Year Strategic Pillars, 2011) led to the organization seeking new avenues for work and contracts and varied lines of funding. Accompanying the organization’s 4-year strategic plan is a 4-year plan focused solely on budget and revenue generation. This plan aims to achieve, “A sustainable budget by

FY15 built on diversified revenues and a manageable demand for philanthropic support,” (Internal Document: Stepping Up, A Four Year Strategic Budget Plan, 2011).

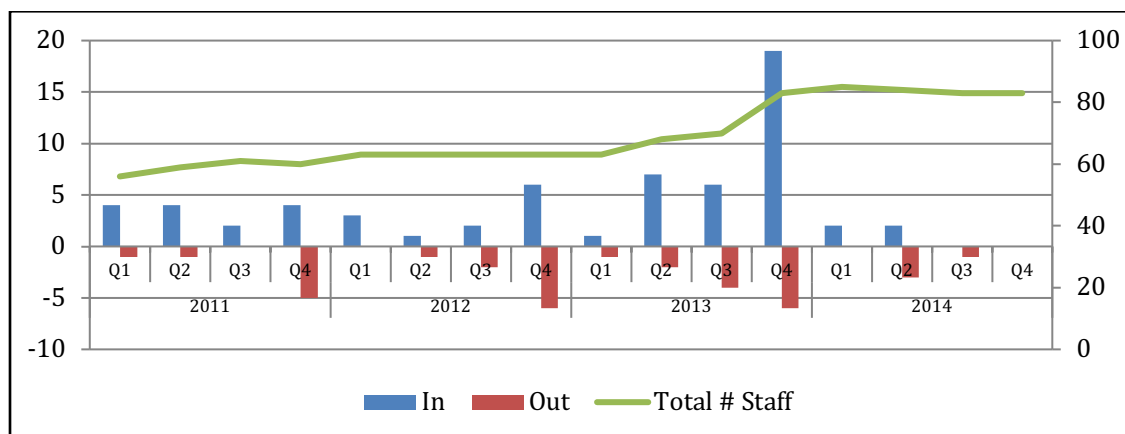
Specifically, the plan aims to increase the percentage of total revenue that earned fee revenue occupies from approximately 60% in FY2011 to 75% in FY2015. In addition to this increase in percentage, the plan also identifies a diversification in the types of earned fee revenue. In FY2011, total revenue consisted of earned fee revenue, grant revenue and individual donations; and 100% of earned fee revenue came from “Whole School”⁴ work. In FY2015, while total revenue will still consist of earned fee revenue, grant revenue, and individual donations, funding will be more diversified across each of these categories. The plan outlines that in FY2015 “Whole School” work will only account for 82% of earned fee revenue and that new school contracts, focused professional development contracts, and new market development will serve as other anticipated sources of earned fee revenue (Internal Document: Stepping Up, A Four Year Strategic Budget Plan, 2011).

To meet the growing demands of diversifying product offerings and revenue streams, EL has also had to grow and expand its staff. In the past year alone (FY2013), Expeditionary Learning has seen its staff grow by nearly 30%. Figure 1 shows the number of staff hired, the number of staff who left, and the total staff count for FY2011-2014 by quarter. This increase in hiring has led to a staff that, on average, has a

⁴ Expeditionary Learning’s “Whole School” work comprises of EL partnering with new or existing public, charter, and private schools across the country. The Whole School Network is divided into six geographic regions: Mid-Atlantic, Midwest, Mountain, Northeast, Southeast, and West. The process of becoming a partner school in the Whole School Network is referred to as the “Partnership Development Process” and is described by the following: “Expeditionary Learning partners with new and existing schools in order to increase student achievement through the strategic implementation of a whole-school framework for teaching and learning. Partnering with EL requires a significant and sustained investment of resources and pushes teachers and leaders to engage in complex, collaborative change,” (Partnership Development Process, EL Document, 2012).

relatively short tenure with EL. In fact, as of the writing of this capstone, 55% of EL employees have been employed by EL for less than 3 years.

Figure 1: Staff numbers at Expeditionary Learning for FY2011-FY2014



Source: Expeditionary Learning Human Resources Department

New staff members were hired into existing positions to support growth in current lines of work and into newly created positions to support diversification of product offerings. Many new director positions, characterized as being non-field staff, being responsible for budget, and reporting to a chief officer, were created. New positions created between FY2012-FY2014 include: Director of Market Development, Lead Professional Development Specialist, Professional Development Specialist, Director of Online Professional Development, Director of Curriculum, Director of Communications, and Director of Professional Development.

EL Mission and Vision Statements

Recently, during FY2013, through a shared, collaborative process engaging EL staff members at all levels and EL board members, the organization revisited and clarified its vision and mission statements. Participants in the process were asked to

answer a series of questions to stimulate thinking and respond to several prompts in order to gather ideas for building a shared vision and mission. Questions included⁵:

- What is the goal – the result – that we are trying to achieve for each of the following groups: schools, teachers, and students?
- What is the purpose – the overarching result – that ties all of these results together? In what ways does our expanding vision of our work challenge or reinforce what we think of as our purpose?

Through this iterative process, the organization landed on the following vision, mission, and approach statements, tested in small pockets as of July of 2013:

Our Vision: When students and teachers are engaged in work that is challenging, adventurous and meaningful, learning and achievement flourish.

Our Mission: To create classrooms where teachers can fulfill their highest aspirations, and students achieve more than they think possible, becoming active contributors to building a better world.

Our Approach: Our approach is grounded in respect for teachers and school leaders as creative agents in their classrooms. We build their capacity to ignite each student's motivation, persistence and compassion to propel growth and success in school, college, career and life. Our definition of student success combines academic achievement, character and high quality work. We believe that academic success is built on strong character qualities of collaboration, perseverance, responsibility and compassion, and that character is shaped through engaging and challenging academic work. (EL Mission Statement, 2013)

While previously the organization had working vision and mission statements⁶, many of them, if not all, were implicit, never being made public. The explicit naming of an organization wide vision and mission, including its board approval and pocket testing,

⁵ To see a complete listing of the questions and prompts used during this process, please refer to Appendix C

⁶ Until the mission/vision creating process in FY2013, Expeditionary Learning did not have explicit, clearly articulated, and published mission or vision statements. However, the organization did operate from several implicit and/or unpublished mission and vision statements. To view historical vision and mission statements from EL, please see Appendix D

marks a point for EL in which a proverbial stake is placed in the ground, representing a commitment to a brand that, until now, had not been explicitly appointed or focused on.

Framing of Strategic Project

Expeditionary Learning is experiencing a period of tremendous growth and change marked by new opportunities to pursue and refine mission-aligned business. With this growth, comes a need to systematize and organize many aspects of the organization, including structures and processes for collecting, analyzing, and responding to data regarding client experiences and client satisfaction. As the majority of EL's work is client facing, gathering data from these clients with regards to their experiences with EL is crucial to ensuring needs of clients are met and ultimate outcomes of impacting teacher practice and student achievement are reached.

EL seeks to change and improve the way in which it engages with data, specifically data and feedback coming from clients regarding their satisfaction and experience with EL's products and services. Central to this issue lies the question: how can we make a change that will lead us in a new direction? As Langley, Moen, Nolan, Nolan, Norman and Provost (2009) state, "All improvement require change, but not all change will result in improvement," (p.2). Therefore, for any organization seeking to undergo changes for the sake of improvement, it is important to determine what changes will result in improvement. Langley, et al (2009) state that the changes that result in improvement are those that, "Alter how work or activity is done or the makeup of a product; produce visible, positive differences in results relative to historical norms; and have a lasting impact," (p. 16).

To that end, I developed questions to guide the implementation of a project to meet the dynamic needs of the organization. These questions are:

1. How can EL become a more data driven organization in order to ensure uniformity of quality of client experiences, and, ultimately, client satisfaction?
2. How can EL use data gathered from client feedback to learn, grow, and continuously improve?

There are several focused sub-questions that underlie these two broad questions. Several of these sub-questions point toward more technical aspects of this work and include determining the best systems and structures for gathering data effectively and efficiently and determining the best methods for disseminating the data in meaningful, effective, and efficient ways. Yet, other sub-questions point toward the more adaptive nature of this work and include defining how and why the data will be analyzed and used to make informed decisions.

This capstone begins with a Review of Knowledge for Action (RKA) that explores bodies of knowledge pertaining to continuous improvement processes and customer satisfaction. Following the RKA, I describe my strategic project, including what I was tasked with, how I implemented those tasks, the results-to-date of the implementation, and an analysis of this work. Subsequently, I explore my learning, ongoing questions, and implications with respect to my own leadership, Expeditionary Learning, and the education sector at large.

Review of Knowledge for Action

There is a great deal of evidence from the marketing, business, and healthcare industries regarding the collection, analysis, and use of customer satisfaction data, which provide a great deal of information on models of best practices including ideas ranging from step-by-step processes for designing a data collection mechanism to more granular tools for survey design and dissemination (Buckingham, 2001; Burford, Greco, Bedi, Kergon, Morrow, Livingston, & Illing, 2011; Castle, Brown, Hepner, & Hayes, 2005; Fluss & Rogers, 2011; Greco, Carter, Powell, Sweeney, & Stead, 2004; Hayes, 1998; McNamara, 2013; Pecoraro, 2012; Scott, 2001). Gathering client data on experience and satisfaction is an important task for Expeditionary Learning to implement in order to achieve its goals of ensuring uniformly high quality client experiences and satisfaction and building a data-driven culture within the organization. Therefore, this Review of Knowledge for Action (RKA) synthesizes several bodies of knowledge in order to inform EL's process for building a culture of data-driven decision-making, with specific focus on the areas of client experience and satisfaction. The review begins with a discussion on approaching problem or need areas within an organization with a continuous improvement frame.

Continuous Improvement

Continuous improvement (CI) is an array of powerful techniques that has produced substantial improvements in numerous companies and organizations. (Zangwill and Kantor, 1998, p. 910)

Beginning in the management and broader organizational literature, there is a great deal written about continuous improvement. Continuous improvement is characterized as a culture or philosophy of an organization, manifesting itself in

initiatives designed to improve success, eliminate waste, and reduce failures (Bhuiyan & Baghel, 2005); a “commitment to constant examination of technical and administrative processes in search of better methods,” (Dean & Bowen, 1994, p. 395); and the inclination of an organization to “pursue incremental and innovative improvements of its processes, products, and services,” (Anderson, Rungtusanatham, & Schroeder, 1994, p. 623). In essence, it is a commitment from an organization to undertaking reflection, learning, and growth in a consistent, systematic way.

Diving further into the literature yields ideas on how a frame of continuous improvement might manifest itself within an organization or system, and more comprehensive definitions, such as this one from Mitki, Shani, and Meiri (1997) outlining the notion that continuous improvement engages many aspects of the organization:

Continuous improvement is a process that involves everyone, employees and managers alike. It is a process that involves ongoing rearranging and redesigning of elements of the organization; it requires the continuous rethinking of the patterns that connect and relate different elements of the organization and connect them with the environment; it is a process that bundles together data collection, interpretation, research, experimentation and diffusion; and it involves the individual, the team, and the total organization. As such, continuous improvement seeks to develop new cognitive frameworks, interpretive schemes and actions on ongoing bases. (p. 429)

In taking account of these various definitions and descriptions into account, continuous improvement essentially characterizes both a tangible thing that organizations strive to achieve and a more intangible state of being that an organization seeks to embody.

Furthermore, Ahmed, Loh and Zairi (1999) describe the conditions necessary for an organization or business to truly engage in continuous improvement:

Virtually all companies talk about learning and the importance of continuous improvement; many try to 'do it' but only a few actually succeed. The reality is that many companies pay lip service to continuous improvement and learning and often shirk from the aggressive investment and commitment it demands. Most dabble and some even allocate occasional resources, but often the commitment usually ends there. However, becoming a learning and continuously improving company demands more than debate and resources; it requires an organizational culture that constantly guides organizational members to strive for continuous improvement and a climate that is conducive to learning. (p. S426)

Across the various definitions, characteristics, and conditions described in the variety of literature, some themes emerge. In his book *Continuous School Improvement*, Mark A. Smylie (2010) highlights the commonalities apparent across the variety of definitions of continuous improvement drawn from the literature. He has identified eight characteristics that he feels lie at the core of all of these descriptions, definitions, and examples of continuous improvement. These characteristics state that continuous improvement is: regular and ongoing; geared toward incremental changes; intentional and strategic, oriented toward the entire organization; inclusive of all members of the organization; preemptive and responsive in nature; oriented toward the organization's mission, core values, and central beliefs; and integral to achieving the organization's mission and maintaining its identity.

In a white paper produced by the Carnegie Foundation for the Advancement of Teaching, Park, Hironaka, Carver, and Nordstrum (2013) detail several conditions for the work of improvement to be considered continuous, stating, "The only way for quality improvement work to be truly continuous is if it is woven into the fabric of the daily work that individuals are constantly doing. Continuous improvement, therefore, cannot be a separate intervention, implemented in parallel with others. Its focus on processes necessitates that individuals do not simply do the same work differently, but rather that

individuals conduct different work” (p. 5). This presents further evidence that continuous improvement work is not and should not be a single, anomalous event, but rather should be married with the daily practice and work of the individuals involved, particularly if that work is to penetrate the larger system.

This leads directly into another defining characteristic of continuous improvements and organizations that are looking to engage in this type of work: a characteristic of a systemic view. Bryk (2009) states that a necessary feature of continuous improvement organizations is their ability to situate problems of practice as aspects of an entire system, rather than a conglomeration of individual acts, products, and services.

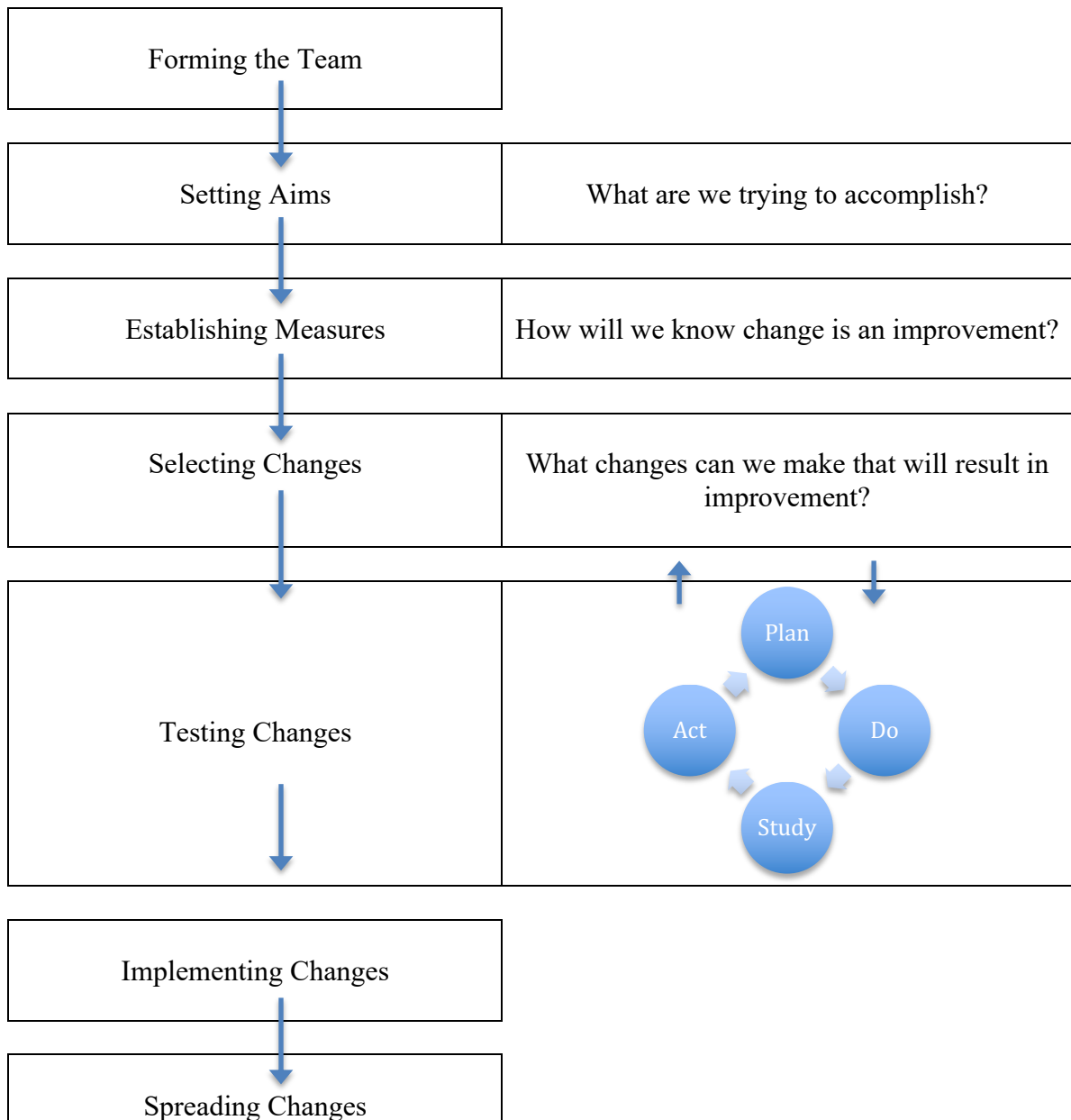
Given these characteristics, it is now important to turn to implementation of a continuous improvement process and highlight a few select methods of doing so.

Frameworks for Continuous Improvement Implementation

The Model for Improvement (Langley et al., 2009) is a tool meant to accelerate change within the existing structures or change initiatives present in an organization. First developed by the Associates in Process Improvement, it has been successfully implemented in a variety of healthcare settings, but has much applicability to the education sector.

The model calls for collaborative teams, made up of a variety of affected stakeholders, to ask three key questions and engage in Deming’s (2000) cycle of Plan-Do-Study-Act. Figure 2 depicts the steps of the Model for Improvement process along with the guiding, framing questions that help focus several of the steps.

Figure 2: Model for Improvement – Process and Focus Questions⁷



While the arrows on the left side of the figure indicate that the process is linear, it is important to note that it is iterative and cyclical in nature, with each step influencing the others, both before and after. Collaborative team members may realize that after

⁷ Adapted from Langley, Moen, Nolan, Nolan, Norman & Provost (2009)

implementing one small set of changes during the *Testing Changes* phase of the process that aims need to be revisited. Additionally, the figure depicts how the *Plan-Do-Study-Act* cycle is iterative in nature and is both influenced by and an influencer of the question “What changes can we make that will result in improvement?” that is asked during the *Selecting Changes* section of the process.

It is interesting to consider this model against the aforementioned characteristics of continuous improvement organizations, particularly when considering how to make small, incremental changes in a focused area permeate the daily practices of individuals. In light of the particular context of the work at Expeditionary Learning, it begs the question of how the task of gathering, analyzing, and using customer satisfaction data will permeate the system of the organization. More specifically, how can leaders ensure that an organization, looking to implement some changes or initiatives does not fall into the trap of what Fullan (2008) calls “initiativitis” (p.1)?

What Fullan (2008) means by this term is the implementation of change effort after change effort or new initiative after new initiative without thought to how these efforts or initiatives interact with each other, the system that already exists, or the members of the organization. Further illuminating this point, Evans, Thornton, and Usinger (2012) state, “Unfortunately, many leaders fail to link planned organizational changes with an appropriate theory of change, thus forfeiting opportunities to facilitate more effective and sustained improvement” (p.155).

It seems that organizing for collaborative work and establishing a culture of gathering, analyzing, and using data will lend itself to this type of data-driven approach

permeating a system. The Datawise (Boudett, City, & Murnane, 2005) process, an improvement process that lends itself well to the work of improvement in school settings, specifically outlines ways in which teams can organize for meaningful, impactful collaborative work. This particular process is geared specifically for school improvement work, with the goal of helping all levels of school stakeholders from central office staff to school leaders to classroom teachers meaningfully and cyclically gather, analyze and use data.

The Datawise (Boudett, City, & Murnane, 2005) process is divided into three distinct sections focused on preparing for collaborative work and learning, inquiring about practices through the gathering of various pieces of data, and, finally, acting on what has been learned. As Boudett, City, and Murnane (2005) state, “Prepare is about putting in place the structure for data analysis and looking at existing data from standardized tests...Inquire is about acquiring the knowledge necessary to decide how to increase student learning...Act is about what to do to improve instruction and to assess whether the changes put in place have made a difference,” (pp. 4-5).

The Datawise (Boudett, City, & Murnane, 2005) process explicitly lays out steps designed to build a strong team and creating a system-wide foundation and culture of collaboration around the use and analysis of data, whether that system is a school, a district, or an organization. Boudett, City, and Murnane (2005) state, “When people are involved in analyzing and interpreting data collaboratively, they become more invested in the [school] improvement efforts that are generated out of those discussions. The more people involved in data analysis and interpretation, the more effective the resulting school improvement efforts will be,” (p. 20). It seems, therefore, that building a strong

and effective culture around collaboration can lay the foundation for meaningful conversations around a particular set of data collected and also has the potential to lend itself to subsequent work around the gathering, analysis, and use of data.

Customer Satisfaction

As the focus of my strategic project is to design and implement consistent and systematic customer satisfaction feedback loops, it is important to review relevant research on gathering, analyzing, and disseminating customer feedback and satisfaction data. In this next section of the RKA, I examine literature related to this topic, coming from the healthcare, manufacturing, and business industries. It is important to note, that while much of the literature I reviewed comes from industries outside of education, the information I gathered is still highly relevant and useful in the field of education.

Much of the literature illuminates the fact that gathering customer feedback in and of itself is not a particularly useful task (Fluss & Rogers, 2011; Greco, Carter, Powell, & Sweeney, Stead, 2004; Hayes, 1998; Scott, 2001). In their article in *Customer Relationship Management*, Fluss and Rogers (2011) point out, “Unless feedback leads to concrete change, customers become frustrated and dissatisfied with surveys and the associated organization. Surveying is a first step in an iterative process that should include feedback collection, analysis, action, and change,” (p. 40). Furthermore, as Burford et al. (2011) state in their study regarding the usefulness of patient feedback on consultations with doctors, doctors’ engagement with patient feedback after it is gathered is what truly gives the patient a voice in the process of consultations. Therefore, as organizations and companies engage in understanding their customers’ needs,

requirements, and feedback, it is clear that gathering the data is only the first step in a process, geared toward improvement and learning.

Customer feedback and satisfaction information is often gathered to determine customers' thoughts with respect to the quality of a product or service so it is of utmost importance that a clear definition of quality exists. For example, from the field of healthcare, researchers Burford et al. (2011) found that in order for patient feedback tools regarding consultations with doctors to be effective and target the appropriate areas, it was important to understand what constituted a good consultation, from the perspective of both patient and doctor. Having a clear definition of quality with respect to doctor/patient consultations allowed for feedback to be gathered with regard to certain criteria and analyzed against that criteria.

Many authors have pointed out, however, that quality is an elusive and difficult to define concept, for organizations/firms and customers alike. Early writers on the topic of service and product quality, such as McConneli (1968); Shapiro (1972); and Jacoby, Olson, and Haddock (1973) state that the explanation and measurement of quality presents problems for researchers, consumers, and businesses who often bypass clear definitions in favor of one dimensional self-report measures (as cited in Parasuraman, Zeithaml, & Berry, 1985). Furthermore, the definition and measurement of service quality proves to be more difficult than that of goods quality, as services are marked by factors of intangibility, heterogeneity, and inseparability.

The intangibility of services refers to the fact that services are performances rather than objects. Parasuraman, Zeithaml, and Berry (1985) point out, "Most services cannot

be counted, measured, inventoried, tested, and verified in advance of sale to assure quality. Because of intangibility, the firm may find it difficult to understand how consumers perceive their services and evaluate service quality,” (p. 42). Quite different from goods, which have manufacturing specifications and often follow strict processes and checklists for production, the quality of services relies heavily on the humans performing them.

Another factor leading to a difficulty in defining quality with regards to services is the heterogeneity of services. With the involvement of humans in the performance or delivery of a service, this factor is introduced. Services, particularly those with high labor content, vary from producer to producer, from customer to customer, and from day to day (Parasuraman, Zeithaml, & Berry, 1985). Thus a firm, employing a number of different people to deliver or perform what is hoped to be the same service, will likely have a difficult time controlling for the differences inherent in the delivery or performance of that service as human involvement introduces dissimilarities, however small, to the process.

Finally, a third factor leading to difficulties in determining quality of services is that of a service’s inseparability from production to consumption. Because services are performances and not objects, the quality rests in the delivery of the service, which is often not engineered or manufactured ahead of time at a plant. Lehtinen and Lehtinen (1982) argue that, particularly for labor-intensive services, quality occurs during the delivery of said service, usually during an interaction between the person delivering the service and the customer receiving the service (as cited in Parasuraman, Zeithaml, & Berry, 1985). Moreover, if the service involves customer participation, the quality of the

service might be greatly affected by the quality and level of the customer's input or participation (Parasuraman, Zeithaml, & Berry, 1985). Parasuraman, Zeithaml, and Berry (1985) offer the following example, "The service firm may have less managerial control over quality in services where consumer participation is intense (e.g., haircuts, doctor's visits) because the client affects the process. In these situations, the consumer's input (description of how the haircut should look, description of symptoms) becomes critical to the quality of service performance," (p. 42). While the example relayed by Parasuraman, Zeithaml and Berry (1985) seems far from what occurs in education, many similarities can be drawn. In the field of professional development and other support services for teachers and school/district leaders, the recipient of the service, in this case the teacher or school/district leader attending and participating in a professional development workshop, is an active participant in the delivery and performance of the service, in this case, the actual training, and therefore, can greatly affect the quality of the service depending on the level and quality of participation.

Capitalizing on the work of earlier researchers and conducting their own consumer focus groups and executive interviews, Parasuraman, Zeithaml, and Berry (1985), found that, regardless of the type of service, consumers used relatively similar criteria when determining service quality. These criteria fall into 10 categories and are listed, along with specific examples and statements, in Table 1. Parasuraman, Zeithaml, and Berry (1985) give these words of caution, however, "[These are]... examples of service specific criteria that emerged in the focus groups...[and do not mean]... to suggest that the 10 determinants are non-overlapping. Because the research was exploratory, measurement of possible overlap across the 10 criteria (as well as

determination of whether some can be combined) must await future empirical investigation,” (p. 46).

Table 1: Determinants of Service Quality

Category	Definition	Specific Example
Reliability	- Consistency of performance and dependability - Service performed correctly the first time - Firm honors its promises	- Accuracy in billing and record keeping - Performing service at designated, agreed upon time
Responsiveness	- Willingness and readiness of employees to perform a service - Timeliness of service	- Calling a customer back quickly - Giving prompt service
Competence	- Possession of the required skill and knowledge to perform the service	- Knowledge and skill of contact personnel - Knowledge and skill of operational support
Access	- Approachability and ease of contact	- Convenient hours and location - Waiting time to receive service is not extensive
Courtesy	- Politeness, friendliness, respect, consideration of all firm employees and staff	- Consideration of consumer's property - Clean and neat appearance of firm personnel
Communication	- Keeping customers informed in a language/manner in which they can understand	- Explaining the service itself - Explaining costs - Assuring customer that problems will be handled
Credibility	- Keeping the customer's best interest at heart - Trustworthiness, believability, honesty	- Sharing honestly about issues, responding quickly to issues
Security	- Freedom from danger, risk, or doubt	- Confidentiality - Physical safety - Financial security
Understanding/ Knowing the Customer	- Making the effort to understand the customer's needs	- Learning the customer's specific requirements - Providing individualized attention
Tangibles	- Physical evidence of service	- Appearance of personnel, facilities, and materials

Source: Parasuraman, Zeithaml, & Berry, 1985, p. 47

As suggested in their first investigation of these 10 determinants of service quality, Parasuraman, Zeithaml, and Berry (1988) conducted further research and data

analysis, leading to the refinement and consolidation of the initial determinants of service quality. The researchers recall the process of refinement as they say, “The scale development process began with the generation of a large pool of items representing various facets of the 10 service quality dimensions. Each item was then recast into two statements – one to measure expectations about firms in general within a service category being investigated and the other to measure perceptions about the particular firm whose service quality was being assessed. The initial instrument was refined, condensed, and validated through several stages of data collection and analysis,” (p. 5). This led to the development of the SERVQUAL methodology.

The SERVQUAL methodology, originally developed by Parasuraman, Zeithaml, and Berry (1988, subsequently revised and refined in 1991), is a service quality research methodology designed to identify gaps between what customers expect from an excellent product or service and what they perceive the service to be in its current state.

The SERVQUAL model uses five different dimensions of service quality to determine customers’ expectations and perceptions regarding the quality of a product or service:

- Tangibles: the physical appearance of people and facilities;
- Reliability: people or companies doing what they say they will, on time and to specification;
- Responsiveness: a willingness to help and meet individual requirements;
- Assurance: displaying trust and confidence, having the necessary skills to get the job done;

- Empathy: understanding customer needs and providing individualized service (Parasuraman, Zeithaml, & Berry, 1988).

Supporting and Hindering Conditions to Continuous Improvement

Summarizing the continuous improvement and customer satisfaction literature, it is clear that there are two levels of supportive and hindering conditions that can be applied. First, in order to implement a continuous improvement process within an organization, there are certain conditions, when identified, that can serve to support or hinder the implementation of said process. An added layer is the application of a continuous improvement process to the collection, analysis, and dissemination of customer feedback and satisfaction data. In this case, the supportive and hindering conditions will have more specificity as it relates to the field of customer satisfaction. Table 2 details both layers of supporting and hindering conditions.

Table 2: Conditions to support or hinder implementing a continuous improvement process

	Supportive Conditions	Hindering Conditions
<i>Implementing Continuous Improvement Process</i>	• Shared vision and goals related to change and improvements to occur • Connecting improvements to larger organization goals or vision • Focused and few changes and improvements introduced and implemented in a given period of time • Cohesion and connection across various teams or parts of organization	• Lack of clarity around change or improvements to occur • Change or improvements occurring in isolation and not connected to broader organization goals or vision • Many changes and improvements introduced and implemented • Silos and/or decentralized pieces of organization that are not connected
<i>Implementing Continuous</i>	• Clear criteria on which to	• Lack of clarity around

<i>Improvement Process Specifically Related to Customer Satisfaction Data</i>	gather customer feedback • Clearly articulated and communicated vision of purpose of gathering data and intended use • Collaboration across decentralized pieces of varying departments with regard to design and implementation of new systems • Opportunities to collaboratively reflect on process	what will be done with customer feedback data • Lack of collaboration with regard to implementation of new systems/tools across decentralized pieces of organization
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Theory of Action

Taking into account the previously outlined supporting and hindering conditions, I propose a hybrid framework, outlined in Figure 3, that draws on practices from the Model for Improvement (Langley et al., 2009), the Datawise process (Boudett, City, & Murnane, 2005), and the research on customer satisfaction, to guide the implementation of a continuous improvement process at Expeditionary Learning with regard to the specific need area of gathering, analyzing, and using client experience and satisfaction data. This framework and accompanying Theory of Action is aimed at pinpointing the supporting conditions and using them to the advantage of the implementation of a particular, focused strategic project. Specifically, this hybrid framework draws on the aspects of Datawise (Boudett, City, & Murnane, 2005) focused on learning from what is already in place and laying the foundation for effective, collaborative work. Additionally, the hybrid framework utilizes the focused questioning, aim setting, and *Plan-Do-Study-Act* cycle outlined in the Model for Improvement (Langley et al., 2009) framework. The answers to the focus questions will draw largely on the best practices related to customer satisfaction data, learned from the customer satisfaction literature.

In essence, this cycle outlines a specific theory of action that I will test out throughout the course of my strategic project and use to guide the work and that is:

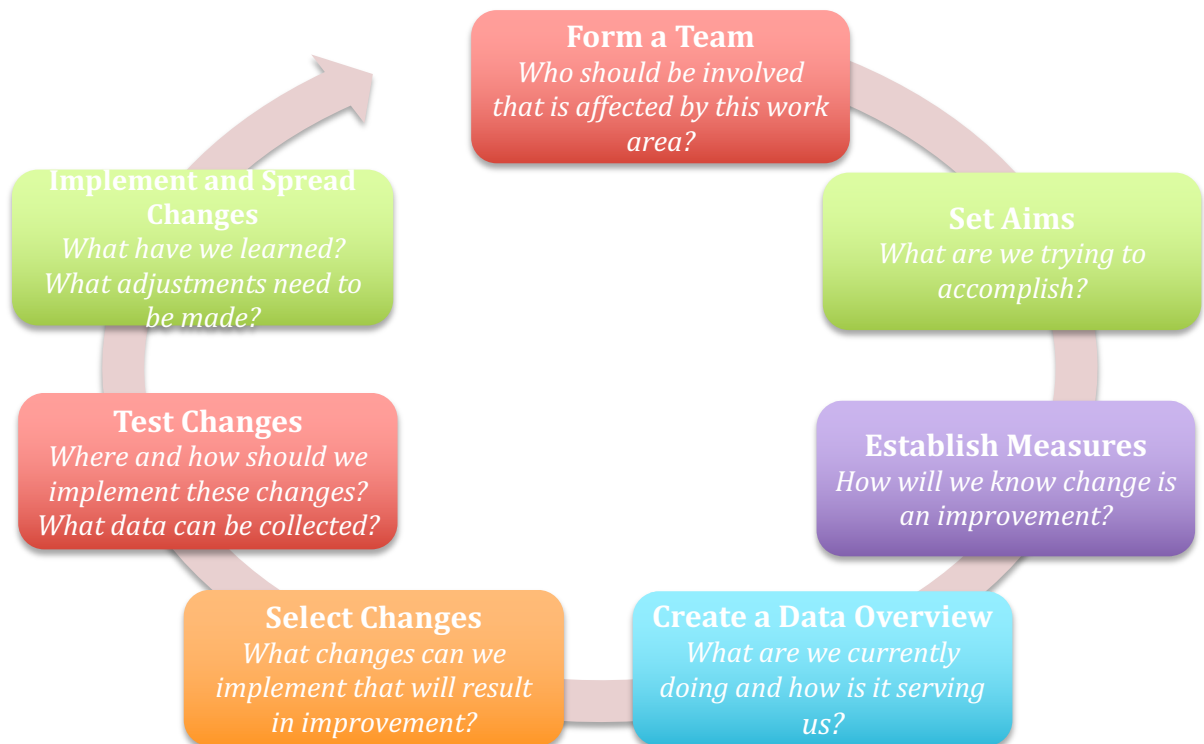
If Expeditionary Learning engages in an iterative, collaborative process to:

- Determine a definition of ‘quality of client experience’
- Identify clear outcomes for its various services

- Implement a systematic tool to gather a variety of data regarding client experiences against the definitions and outcomes previously outlined
- Analyze and determine best uses for that data, and

If Expeditionary Learning consistently and continuously reflects on the implementation of this collaborative and iterative process,

Figure 3: Hybrid Framework and Cycle



Then Expeditionary Learning will become a more data driven organization and can ensure uniformly high quality client experiences and client satisfaction.

Description, Results, and Analysis of Strategic Project

The following sections of the capstone review my strategic project. First I offer a description of the project, including a brief explanation and framing of the task and an overview of the important events and details. Artifacts of my work, including meeting agendas, slides from presentations, and sample survey and interview questions are included in the appendices. Next, I provide the findings from the work, including the results achieved to date and those results that are still in process. Finally, I offer an analysis of these results, seeking to understand why certain results were achieved and how they were achieved, employing two lenses: The 4 C's Framework (Wagner, Kegan, Lahey, Lemons, Garnier, Helsing, Howell, and Thurber-Rasmussen, 2006) and Organizational Immunity to Change Mapping (Kegan and Lahey, 2009). These lenses allow me to understand how and why implementation of a continuous improvement process related to customer satisfaction did not necessarily occur as originally planned and suggested.

Description of Strategic Project

Expeditionary Learning (EL) prides itself on the cultures of critique and feedback that are cultivated in their schools. In EL schools across the country one can find students, teachers, and leaders consistently engaging in regular processes of feedback and evaluation, in both formal and informal ways. This vision of strong cultures of feedback and critique existing in EL schools is best described in EL's Core Practices (2011):

Our leaders, teachers, and students embrace the power of student-engaged assessment practices to build student ownership of learning, focus students on reaching standards-based learning targets, and drive achievement... Students continually assess and improve the quality of their work through the use of models, reflection, critique, rubrics, and work with experts. Staff members engage

in ongoing data inquiry and analysis, examining everything from patterns in student work to results from formal assessments, disaggregating data by groups of students to recognize and address gaps in achievement. (p. 5)

Furthermore, EL school leaders are guided and coached to use data wisely, building, “a cohesive school vision focused on student achievement and continuous improvement,” (EL Core Practices, 2011, p. 5).

This vision for wise data use and a focus on continuous improvement is not limited to schools that partner with EL. A similar commitment to using feedback to learn and grow exists across a variety of levels of the organization, from Senior Support Team members to Regional Directors to School Designers, though generally happening in more informal and organic ways. A member of the Senior Support Team highlights this phenomenon as he says, “We are pretty good at gathering information in more informal ways, through conversations and ongoing relationships; we have been gathering information and data in this way for years. What we do with it; how we use and analyze that data is probably a point or an area for significant growth,” (Personal Communication, September 2013). Another Senior Support Team member pointed to the fact that while data might be collected, its strategic use in redesign, programmatic changes, and broader organizational shifts remains elusive:

I think we have not been very strong in collecting feedback in the most useful ways and figuring out good ways to analyze it. We’ve only, out of the last 20 years, it’s only been in the last 3-4 years that we’ve begun to collect survey data from our institutes... We’ve mostly done the redesign to the gut feelings of the leaders of what worked and didn’t work. We haven’t used client data in wise and smart ways and we haven’t necessarily been sharp about what tools would collect those data best. (Personal Communication, September 2013)

As these Senior Support Team members point out, Expeditionary Learning and its staff and programming are poised and eager for assistance and redefinition with respect

to data collection, data analysis, and strategic and informed use of data in an effort to reinforce and strengthen those more organic and informal mechanisms already in place.

However, as described in this Capstone's introduction, Expeditionary Learning is in a period of tremendous growth: in staff, in revenue streams, in partners, and in mission-aligned business. The rapid growth the organization experienced in the last several years and continues to experience underscores the importance of formalizing feedback collection and analysis processes. As a staff member at the National Director level points out, "With a broadening set of offerings for schools, EL must continually evaluate itself. We must work with our clients to develop programs and experiences that trigger student success [and] not just do our work in a vacuum assuming it's successful," (Personal Communication, October 2013).

One such aspect of growing revenue streams and mission-aligned business is the burgeoning business line of professional development offerings related to the implementation of EL's Common Core State Standards (herein referred to as CCSS) aligned English Language Arts Curriculum Modules (herein referred to as the 'ELA Modules'). This new line of business expands EL's client pool tremendously, as now thousands of teachers across the country are attending these professional development offerings and still tens of thousands of teachers are accessing EL's CCSS ELA Modules. Thus, in addition to the 160 schools, and their respective administrators and teachers, that partner with EL through the "Whole School" network, the number of clients that EL

touches has now grown exponentially, with the addition of the teachers, administrators, and district leaders touched by the work of the “Professional Services”⁸ business line.

As the majority of EL’s work is client facing, gathering data from these stakeholders, including school and district leaders and teachers, with regards to their experiences with EL is crucial to ensuring needs of clients are met, the ultimate outcomes of impacting teacher practice and student achievement are reached, and the vision and mission statements are actualized.

When I arrived at Expeditionary Learning in July of 2013, it was clear that due to the growth, expansion, and change EL experienced and continues to experience, a need for stronger systems, structures and processes across the organization and its various functions had arisen. During discussions, occurring both pre-arrival and after my official start, with my supervisor and other organization leaders, one specific area in which the organization needed assistance in order to become more systematic and consistent was with respect to collecting, analyzing, and responding to data regarding client experiences and client satisfaction. Additionally, senior EL leaders referred to a strong desire to create ‘customer satisfaction feedback loops’, or processes in which information and data is gathered from customers and clients, analyzed, acted upon when appropriate, and is subsequently shared back to the customers and clients.

Initially, my work was to focus solely on the burgeoning business line of professional development offerings related to the implementation of EL’s CCSS aligned

⁸ Diversification of earned fee revenue is being sought through the development and selling of new, more modular offerings. There are several new offerings, one of which, originally called Focused Professional Development contracts and now part of the “Professional Services” business line, involves delivering self-contained training units to non-EL network schools. This training often relates to the implementation of the CCSS aligned ELA modules.

ELA modules. As this was a growing, new business line for EL and one that was gaining momentum and traction, it seemed as if it would offer the best focus for my work around client satisfaction feedback loops. Additionally, the organization, at the time, was structured such that this new line of business of “Professional Services” was situated separately from the other major work that EL engaged in: the “Whole School” work. During the first few months of my time at EL, however, due to shifting work streams and responsibilities, a change in supervisors, and a grounding in the organization’s FY14 Strategic Plan, the focus and nature of my strategic project shifted from dealing solely with the “Professional Services” work to dealing more broadly with all of EL’s services and products.⁹

As examined in this Capstone’s Review of Knowledge for Action (RKA), I suggested approaching the need area of more systematic and consistent processes and structures with regard to gathering, analyzing, disseminating, and using client satisfaction and experience data through a continuous improvement process approach and proposed a hybrid framework based on the work of the Datawise Process (Boudett, City, & Murnane, 2005) and the Model for Improvement (Langley et al., 2009). This hybrid framework, first described in this Capstone’s RKA, accounted for the steps of the Datawise Process (Boudett, City, & Murnane, 2005) and the Model for Improvement (Langley et al., 2009) which matched closely with EL’s needs and context. These steps include forming a team and organizing for collaborative work; determining aims and measures with regard to

⁹ Initially, my strategic project was to focus mainly on the work happening in the Professional Services line of EL. In the first few months of my residency, this shifted to include more of EL’s product and service offerings included in the Whole School line of work. Eventually, this shifted even further to solely focus on the Whole School line of work. To see initial descriptions of my project, please review September Strategic Project Memo in Appendix E.

gathering customer experience and satisfaction data, specifically focusing on the work of school coaches and school designers; determining aims and measures for using, analyzing, and disseminating the data; testing changes; and engaging in collaborative work around gathering, examining, disseminating, and using the data. I saw this as an iterative process that was not necessarily linear, with information and learning from each step informing and shaping the work of successive steps and potentially directing the team toward revisiting previous steps in the process.

Drawing from the literature on continuous improvement processes and customer satisfaction previously reviewed in the RKA, it was essential that project and initiative foundationally rest upon answers to major questions about the purpose of this type of data collection within the organization and the implications of this type of data collection for the organization's internal and external work. More specifically, I thought it was important that the organization and its leaders consider why it was important to gather feedback and satisfaction data from its clients. Moreover, as the terms 'client feedback' and 'client satisfaction data' are very broad, it was essential to determine what specific information and data was being sought from clients and to define criteria and quality aspects upon which feedback would be solicited. Finally, in considering the adoption of feedback collection mechanisms, it was important to establish what would be done with the data once it was collected, who would have access to it, and how and to whom it would be presented.

Strategic Project Approach

As I approached the task and challenge of implementing a continuous improvement process, I found it important to organize my work into three major

categories, all intended to capitalize on the supportive conditions, previously highlighted in this Capstone's RKA. Those three major categories consist of: connecting/placing this data collection and analysis initiative within a larger frame and broader organizational goal and vision; to understand organizational context and readiness for change; and, finally, to capitalize on and bolster any cohesion already in existence across disparate and decentralized organizational elements already in existence. Approaching the specific tasks and aspects of the project with these three broader categories in mind allowed me to maintain focus with my work and keep the ultimate goal of broader organizational traction with respect to change initiatives at the forefront.

I. Connecting Data Collection Initiative to Broader Organizational Goals and Vision

The first category of my work involved connecting this particular data collection initiative to a larger organizational frame and broader organizational goals. To this end, I focused on three distinct tasks: capitalizing on the FY14 strategic plan, promoting the implementation of a continuous improvement process with regard to customer satisfaction data collection, and consistently posing questions regarding the place of this data collecting within the larger organization.

At the time of my arrival at EL, leaders were in the process of drafting, revising, and, eventually, making public, the organization wide strategic priorities for FY 2014. Initial drafts of the strategic priorities made clear that a major focus area for the organization in the coming fiscal year would be using data to strengthen programming, to solidify EL's body of research, and to amplify the organization's public relations outreach. Although early drafts of the organization wide strategic priorities made no

mention of the use of customer feedback and satisfaction data in this push to become a more data-driven organization, during conversations with EL's President and Chief Executive Officer (CEO), Scott Hartl, in August and September of 2013, I advocated for its inclusion.

Given that the organization saw a need to become more data driven and the organization had invested time and money in supporting me as a resident, with my area of focus being customer satisfaction data, I proposed that customer satisfaction and experience data be leveraged as one of the data sets employed in order to strengthen programs and solidify EL's research base. Ultimately, I felt that customer satisfaction and experience data could be one of many data sets used in the organization's push toward becoming more data-driven. Thus, I suggested that implementing consistent and systematic customer satisfaction feedback loops in order to elevate the consistency of delivered programs become an integral portion of the organization-wide strategic priorities for FY 2014¹⁰.

In order for this particular change initiative to gain greater traction in the organization as a whole, rather than remaining an isolated initiative, I suggested approaching this need area through the frame of a continuous improvement process. Such a process allows for a cross-functional team to be formed, for small changes to be tested and evaluated, and for suggestions for larger organizational initiatives to come from this incremental testing. In earlier sections of this Capstone (RKA and Description of Project), I outline the hybrid framework I developed based on the work of the

¹⁰ EL publishes Organization Wide Goals each year to supplement and dovetail with the Organization's 4 Year Strategic Plan. To see a complete listing of Expeditionary Learning's Organization Wide Strategic Priorities for FY 2014, please see Appendix F.

Datawise Process and the Model for Improvement. I presented this hybrid framework to senior leaders at EL¹¹ and subsequently used it as a guide to further elaborate on the questions that I deemed necessary to guide each step of the process. These questions, presented in the Detailed Guide found in Table 3, uncover specific aspects of each step of an improvement process as it relates to the specific area of customer satisfaction data collection at EL.

The purpose of this detailed guide, and the specific questions included in it, was three-fold: to illuminate some of the more technical aspects of this initiative, including identifying the methods of data collection and the clients from whom data would be collected; to maintain focus on larger organization-wide adoption of the initiative; and to establish a cross-functional team, in hopes of supporting and establishing cohesion across disparate pieces of the organization.

In addition to proposing the hybrid continuous improvement framework, I suggested that EL consider adopting a “National Client Feedback Policy”. This policy would outline and communicate to all staff and clients the purpose and rationale behind collecting this type of feedback. Additionally, the policy would clearly articulate the intended use of feedback gathered, and the methods for sharing the feedback gathered. Specifically, I suggested that a cross-functional team consisting of staff at a variety of levels determine if, how, and to what degree client satisfaction data would inform organizational decisions such as programming, staffing, and pricing.

¹¹ The senior leaders I approached for initial approval and adoption of the hybrid framework included, Scott Hartl, CEO; Mindy Spencer, Former Director of Research and Assessment; Tom Van Winkle, Managing Director of School Support; and Lily Newman, Northeast Regional Director.

Table 3: Detailed Guide

Step		Focus Question	
Reflection on learning Adjust and change as necessary	Form a team, organize for collaborative work	Who should be involved that is affected by this work area?	
	Set Aims	What are we trying to accomplish?	
		With respect to data collection: 1. Setting realistic goals for data system 2. What information do we want to find out 3. How do we anticipate finding it out	With respect to EL services: 1. Definition of “quality client experience” 2. Definition of “client satisfaction” 3. How will we know clients are satisfied?
	Establish Measures	How will we know change is an improvement?	
		With respect to data collection: 1. Are there goals for a certain amount of data to be collected? 2. Are there goals for certain types of data to be collected?	With respect to client satisfaction: 1. How do we know clients are satisfied? 2. Are there targets for certain amounts of client satisfaction?
	Create a Data Overview	What do we do right now and how is it serving us?	
		1. What tools are already in place? 2. What are those tools telling us? 3. What are the tools not telling us? What do we still want to know? 4. What questions do we still have about the information we have and don't have?	
	Select Changes	What changes can we make that will result in improvement?	
		1. Client Experience/Satisfaction Pilot Evaluation System i. Mentor Schools – 1 or 2 ii. Schools within network – 1 or 2 iii. Clients/participants of PD related to CCSS module implementation – 1 or 2 (district and school)	
	Testing Changes	Where and how should we implement these changes? What data can we gather about the implementation of change?	
		About data gathering: 1. Is the change we have implemented (pilot evaluation) getting us the data/information that we want? 2. How is the process of implementation of the survey going?	About client satisfaction: 1. When and how should surveys be administered? 2. What are the high leverage questions
	Implement and Spread Changes	What have we learned? What adjustments are needed for larger scale implementation?	

Given the research I had conducted regarding customer satisfaction, I also suggested that the organization clearly define the specific quality criteria for each service/product on which feedback was desired. In a presentation I made to SST members, I outlined an example of how the generic determinants of service quality could be applied to a specific product or service, School Designer Coaching, which can be seen in Table 4.

Table 4: Dimensions of Service Quality¹² Applied to EL's School Designer Coaching

Dimension	Definition	Application to School Designer Coaching
Reliability	Capability to do the promised service accurately and dependably	- SDs ability to deliver coaching services - SDs ability to support schools in meeting work plan goals, achieving high levels of implementation
Tangibility	Physical properties, appearance of personnel and equipment	- Organization, professionalism, communication of SDs
Responsiveness	Ability of staff/provider to react promptly	- SDs ability to adapt to context and make adjustments as necessary - SDs ability to respond to client needs
Assurance	Knowledge of staff and their capability to inspire confidence and trust	- Knowledge competencies of SDs - Relationship building and management aspect of SD coaching
Empathy	Caring, individualized interest provided to customers	- SDs ability to establish effective relationships

Finally, to maintain a focus on connecting this initiative to larger organizational goals, I continued to pose questions regarding the purpose and rationale behind wanting to collect, analyze, and use client feedback. Aside from the standard answer that a firm or an organization providing a service or product to clients should collect feedback from its clients, it was important to uncover and explicitly name why EL, and its senior leaders in particular, are so committed to gathering this type of feedback in a systematic and

¹² These dimensions of service quality come from the work of Parasuraman, Zeithaml, and Berry (1985).

consistent manner. As such, during all meetings with senior leaders and my supervisors, I attempted to surface the questions relating to the purpose of this data collection and the plan for its use once collected. Some of the specific questions included:

- Why does EL want this information in the first place, has that been made explicit to staff and clients? (Personal Communication, October, 2013)
- What types of decisions should/could be informed by customer satisfaction data? What do SST members and other director level staff members think about how the data will and should be used? (Personal Communication, October, 2013)
- Once a team is formed, can we determine our own definition of client satisfaction? Can we determine our own aims and goals, or are there thoughts organizationally on what those should be? (Personal Communication, September, 2013)
- Is there a clear answer as to why EL wants client satisfaction data? Will having this answer provide information on what will be done with data? (Personal Communication, September, 2013)

II. Understand Organizational Context and Readiness for Change

The second category of my work focused on understanding the organizational context, both internally and externally, and how this context might translate into its readiness for change initiatives. The activities within this category of work were designed to provide a rich synthesis of the organization's history, internal (staff) and external (school leaders and teachers) needs and perceived challenges, current processes for feedback gathering in place, and build credibility and legitimacy of this data collection initiative. What challenges does Expeditionary Learning face in implementing

change initiatives, specifically ones regarding data collection? What are the strengths of the organization that can be leveraged to support implementation of such an initiative?

To understand the organizational context of Expeditionary Learning and how that might impact its readiness for implementation of a change initiative, I employed a multi-prong entry strategy that focused on listening, observing, and asking questions. Prior to my entry, I had crafted an entry plan that included interviews with a variety of stakeholders, shadowing and observations of staff members at varying levels in the organization, and review of pertinent historical and programmatic documents.¹³ While my initial entry plan required modification, I still employed many of the same strategies.

I had the opportunity to interview a number of external stakeholders (leaders of EL schools) and a limited number of staff, but due to the geographically dispersed nature of EL's staff, I relied on surveys to gain information about data collection from a broad variety of staff. In these surveys, I asked staff ranging from field staff to Senior Support Team members, to answer questions about whether they deemed it necessary for EL to gather client feedback, what the organization should do with the data once it was gathered, what was already in place (informally and formally) to gather this type of data, and how best existing structures and processes might be enhanced.

Finally to gain another layer of understanding, I reviewed any documents I could find pertaining to the organization and that I found relevant to my strategic project.

These included historical mission statements and organization charts, data from any

¹³ Due to shifting work streams, shifts in the focus of my strategic project, and shifts in supervisory roles, my entry plan did not occur as originally planned, though I was able to conduct many of the steps in a modified manner. To see my original entry plan, please see Entry Plan in Appendix G.

surveys conducted in the past 5 years and documents related to: the use of feedback in revision cycles (Institute Revision Process) and quality criteria applied to EL services (School Designer Competencies, Elements of High Quality Professional Development). A synthesis and summary of the information collected from the interviews, surveys and document review is shared in the “Results To Date” section of the Capstone.

III. Centralization vs. Autonomy

The third and final category of my work focused on the tension between autonomous entities and a central authority. In order for this particular change initiative to have greater organizational effect and to ultimately live beyond a single person (me) or a moment in time (my residency), I felt it important that it cut across the borders that naturally existed amongst regions and departments.

Expeditionary Learning is a geographically dispersed organization by design; with the majority of client facing work and the staff that conducts it divided into six, distinct and somewhat autonomous, regions. My strategic project focused mainly on data collection on EL’s largest product and service – School Coaching – and, each region has different processes, structures and elements in place with respect to School Coaching.

One such structure that varies from region to region is the mid-year review process, which was seen as an appropriate moment in the cycle of school coaching and professional development delivery and an already existing structure to which client feedback questions could be attached. This process is designed for EL staff and partner schools to get a sense of the progress schools are making toward implementation and work plan goals. There is a wide variety of what occurs from region to region regarding

the mid-year reviews ranging from highly developed processes involving learning walks, staff surveys, and debriefing conversations to informal meetings to nothing at all.

While many Regional Directors and Field Staff desired more consistency and organizational coherence with regards to structures such as the mid-year review or feedback collection, there was a wealth of data that pointed to a difficulty in establishing this. The Chief Schools Officer points out, “From the last RD meeting, there is a feeling among RDs that they want more consistency with mid-year reviews and feedback surveys, but the organization is not yet at a point to require these across the board,” (Personal Communication, November 19, 2013).

In an attempt to cut across regional boundaries and to leverage the practices already in place for feedback collection in various regions, I connected with Regional Directors from several regions on the prospect of systematizing the mid-year review process and using it as a structure onto which client feedback questions could be added. During the months of October, November, and December of 2013, I participated in several meetings with Regional Directors charged with examining the Mid-Year Review process and suggesting consistent structures for the organization to adopt and mandate across all regions and schools. During these meetings we discussed how the Mid-Year Review process could become consistent across all regions and what challenges existed in attempting to do so.

Lastly, as I pursued the possibility of implementing a continuous improvement process, I realized the significance and importance of forming a cross-functional, collaborative team to engage in this work. To that end, I first outlined the importance of

forming this team with my supervisors and shared these ideas with other senior leaders at EL. As they provided verbal agreement and suggestions as to which staff members might be a good fit for the team, I proceeded to connect with those staff members. Through emails and one-on-one phone conversations, I solicited the participation of several, targeted members of the staff, laying out specific responsibilities and time commitments.

Results to Date

In the following sections of the capstone I will report on the results of my actions in each of the three specific categories: connecting data collection initiative to broader organizational goals and vision, understanding organizational context and readiness for change, and centralization versus autonomy. In some cases, very tangible outcomes and changes in organizational practice have resulted in my actions. In others, particularly those elements related to understanding organizational context, a greater sense of clarity as to the supportive and hindering conditions in existence in the organization was achieved. In still other cases, work was challenging, roadblocks existed and frustrations abounded and thus, tangible outcomes or shifts in practice are more difficult to detect. Table 5 summarizes the results achieved in each of the three categories of work, both those aspects that went well and those that did not go so well. Additionally, the table serves to link the results within each category to the previously outlined supporting and hindering conditions regarding implementing a continuous improvement process.

Table 5: Summary of Results by Category of Work

	Category	Supporting Condition	Hindering Condition	What Went Well	What Did Not Go Well
1	Connecting Data Collection Initiative to Broader Organization Goals	- Shared vision and goals related to change and improvements - Connecting improvements to larger organization goals or vision - Focused and few changes and improvements introduced and implemented in a given period of time	- Lack of clarity around change or improvements to occur - Change or improvements occurring in isolation and not connected to broader organization goals or vision	- Client Satisfaction Data Collection added to FY14 Org Wide Goals - National Client Feedback Survey administered	- National Client Satisfaction Policy not established - New initiative introduced amongst many other new initiatives
2	Understand Organizational Context and Readiness for Change	Focused and few changes improvements introduced and implemented in a given period of time	- Lack of clarity around change or improvements to occur - Many changes and improvements introduced and implemented	- Greater understanding of feedback mechanisms and processes already in place - Clarity around organizational readiness for initiative/change	New initiative introduced amongst many other new initiatives
3	Centralization vs. Autonomy	Cohesion and connection across various teams/parts of organization	Silos and/or decentralized pieces of organization that are not connected	- Collaboration with Regional Directors - National Client Feedback Survey administered	- Cross-functional team not formed - Communication across all regions regarding implementation of survey

I. Connecting Data Collection Initiative to Broader Organizational Goals and Vision

a. Inclusion of Client Satisfaction in FY14 Organization Wide Goals

The early conversations I conducted with senior leaders at EL helped to establish the focus of my strategic project, data collection from customers and clients and its analysis and use, within the larger FY14 Organization Wide Goals. Connected to Pillar 4 of the Organization's 4-year Strategic Plan, "Solidify EL's body of research and amplify our public relations outreach," (2011), Goal 8 of the October 2013 draft of the Organization Wide Goals states:

Elevate consistency and quality of delivered programs through:

- Customer satisfaction feedback loops
- Data-dashboards to track key student and school outcomes
- Improved inter-rater reliability on our Implementation Review
- New third-party study focused on the impact of our literacy curriculum and associated professional services. (p. 3).

Additionally, in an email to all directors and SST members, CEO Scott Hartl stated, "[These are] the organization wide goals that lift up the highest priority work for the organization as a whole. This is the version of our goals that is going to the board and they are the goals that I will report out against several times this year to the full staff and board to track our progress," (Personal communication, October 2, 2013).

The adoption of 'customer satisfaction feedback loops' into the organization wide goals elevated feedback from customers as an important source of data in the quest to elevate the consistency and quality of delivered programs. Furthermore, this inclusion

also served as a commitment on the part of the organization to its staff, its board, and its clients to using multiple sources of data as evidence in decision-making.

b. Implementation of Continuous Improvement Process Approved by Leaders

In addition to ‘customer satisfaction feedback loops’ inclusion in the FY14 Organization Wide Goals, leaders at the highest level of the organization, including many SST members, approved implementation of a continuous improvement process to address the collection of customer satisfaction data, as per my suggestion. During a presentation I gave to members of the SST, I offered detailed rationale as to the use of a continuous improvement frame and the specific hybrid frame I developed and received verbal approval and suggestion to move forward with the ‘implementation phase’ of the project (Personal Communication, November 8, 2013). Several other senior leaders, including Regional Directors and the Director of Research and Assessment, while not in a position to grant approval, agreed with the idea of applying a continuous improvement frame to this area.

c. National Client Feedback Survey Designed and Administered

Finally, in an effort to provide a consistent and organization wide structure for gathering client feedback, in conjunction with my suggestion to craft an ‘EL National Client Satisfaction Policy’, I recommended implementing a national survey, administered to all Whole School partner schools. While a national client satisfaction policy was not created, I designed the first Expeditionary Learning National Client Feedback Survey (see National Client Feedback Survey in Appendix H). During design of the survey, I consulted the research I had conducted on client satisfaction, documents outlining quality criteria for School coaching services, and previously administered regional surveys

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May 2014

requesting client feedback. I received approval from the Chief Schools Officer to move ahead with it and communicate the plan to all Regional Directors.

In an email, dated January 9, 2014, sent to all Regional Directors, I communicated the plan to move forward with a national survey and shared a draft set of questions, soliciting feedback and comments. The full text of this email can be found in the Email to RDs about National Survey document in Appendix J. Given that the Chief Schools Officer had approved the administration of the survey, I did not anticipate the flurry of questioning and challenging responses I received from the Regional Directors. One Regional Director stated:

I so appreciate your work, Vaishali. I am concerned, however, that the train has already left the station on this for the NE region. In other words, we first agreed we would talk it through as regions so that's what I did and came back with a proposal from my team. I thought we all agreed to pilot it in a few regions and analyze results.

MYR's have already happened in a number of NE schools where this structure is established and SDs have already pulled from your question bank in their surveys, as we discussed previously, so sending out another survey will feel frustrating to them I believe. Moreover, we already have a different plan for how I will get feedback from all leaders as we originally didn't have a plan to implement this survey nationally for all schools this year. This would be very different if it were October. The truth is nationally we are thinking about systematizing things that SDs have already been doing, so timing is really important to recognize their work.

I'd love to hear thoughts from all of you, and hope we can phase this in as we had discussed. Please know this is not because we're not game for new, improved work in the NE. We regularly bite off new projects and work in new ways, but I want to respect what we laid out originally and stick to that if possible. (Personal Communication, January 9, 2013).

Other Regional Directors felt the survey did not meet their needs as one said:

[This] feels like a big disconnect for me in the content of this survey. I am evaluating my SDs on a set of competencies that are not all represented in this

survey (Focuses on student achievement, fosters EL implementation, builds relationships to support the work, demonstrates character, etc.). I rely on mid-year and end-of-year surveys and conversations with leaders to provide another body of evidence around those competencies. I would need to send out my own survey in addition to this one and that concerns me. (Personal Communication, January 9, 2013).

Eventually, the Chief Schools Officer intervened and communicated to all Regional Directors that the survey would be administered as planned. He cited the rationale that gathering this data across all regions and schools would serve the organization better rather than piloting the administration of the survey in a few regions or focused areas (see Final National Survey Email to RDs in Appendix K). I used the feedback provided by Regional Directors to revise the survey in order to ensure that it met the needs of School Designers looking to improve their practice; Regional Directors evaluating and supporting School Designers; national, senior level staff examining and refining School Designer Allocations and Training; and the organization broadly as it evaluated its efficacy in providing a service to its school partners. The survey was administered to leaders at all 156 partner schools and we received 113 responses.

Preliminary analysis of the data received from the survey indicates that, in general, school leaders appear to be satisfied with their school's partnerships with EL and with the level of support their schools receive from School Designers regarding implementation of the EL model and achieving yearly work plan goals. Figure 4 indicates school leader responses to questions regarding overall satisfaction with partnership and with School Designer support and services. Figure 5 indicates school leader responses to questions regarding overall feelings of support with regard to implementation and work plan goals. At the writing of this capstone, I am compiling a more detailed summary analysis to be shared across various leadership teams at EL,

including the Senior Support Team, the Regional Directors Team, and the Strategic Program Team (see Draft Client Feedback Data Analysis Report in Appendix Q).

Figure 4: Overall Satisfaction Responses

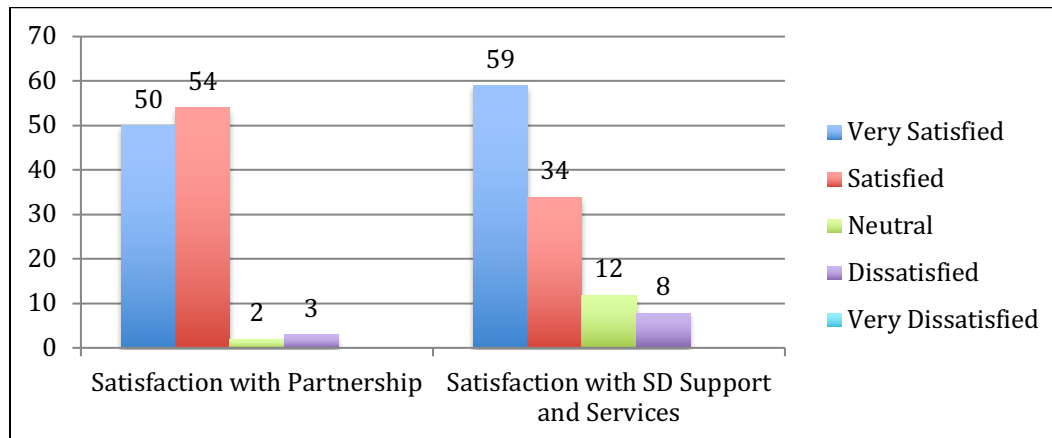
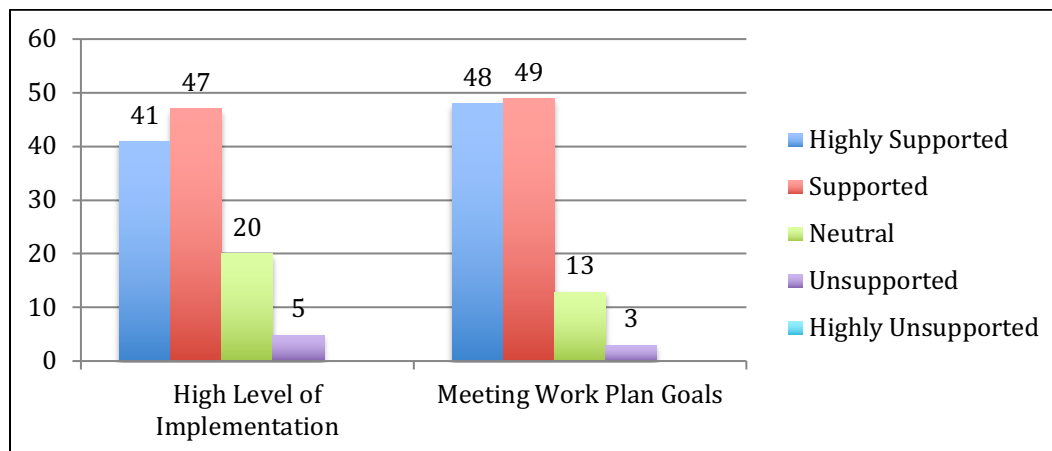


Figure 5: Overall Feelings of Support



II. Understand Organizational Context and Readiness for Change

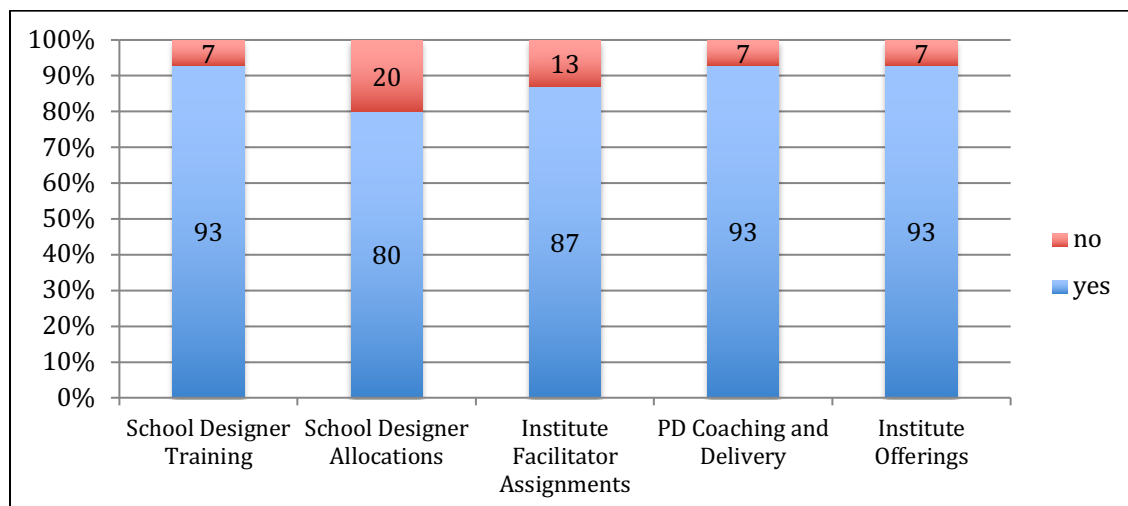
a. Greater Clarity Regarding Feedback Mechanisms in Place

My second category of work, focused on understanding EL's internal and external organizational context and its readiness for change, yielded rich results. I gained a greater sense of clarity around the challenges the organization faced in this period of growth and diversification; what structures and processes were already in place with

regard to data collection, specifically geared toward client feedback; and staff members' espoused versus enacted ideas and behaviors with regard to this particular initiative.

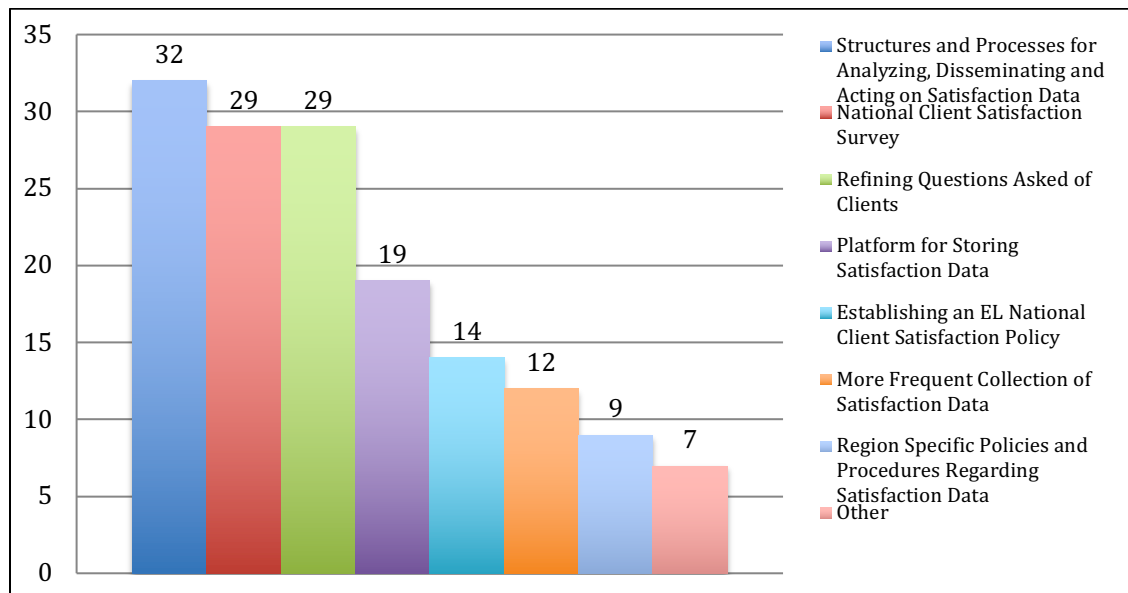
A survey I administered to field staff, Regional Directors, National Directors, and Senior Support Team members on October 29, 2013 provided a window into staff members' views about the potential use of customer feedback data (see Staff Survey about Client Feedback in Appendix L). In total, 46 staff members out of the 70 whose feedback was solicited provided responses to this internal survey. While the general response rate is a little over 50%, disaggregated response rates by job category vary from less than 50% (Senior Support Team) to nearly 75% (School Designers). Of those who responded to the survey, their answers revealed that a desire to use client feedback data to inform programmatic, staffing, and allocations decisions did exist amongst the majority. As noted in Figure 6, in general, 80% or higher of those who responded indicated that client feedback data should and could inform school designer training, school designer allocations, institute facilitator assignments, methods of PD coaching and delivery, and institute offerings.

Figure 6: Should client satisfaction data be used to inform certain decisions?



Staff also indicated, via responses on the survey, that they desired and sought the introduction and adoption of consistent and systematic processes specifically regarding the collection of client feedback data. Figure 7 shows staff member responses to the question, “How can EL’s collection of client feedback data be enhanced?” In answering this question, staff members indicated that their top three methods for enhancing EL’s collection of client satisfaction data were: 1) Structures and Processes for Analyzing, Disseminating, and Acting on Satisfaction Data, 2) National Client Satisfaction Survey, and 3) Refining Questions Asked of Clients. It is important to note that two of these choices (Structures and Processes and National Survey) would require the adoption of new initiatives currently not in place.

Figure 7: Ways in which EL’s collection of client feedback might be enhanced – tally of times each response selected

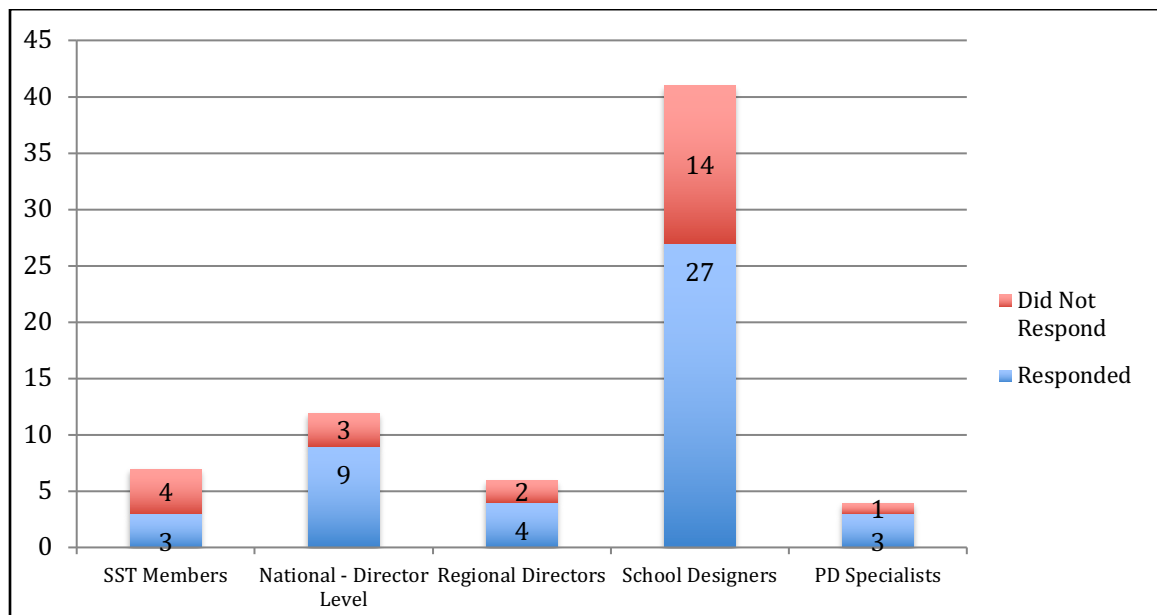


b. Understand Readiness for New Initiative

This internal survey given to staff members and other interviews also revealed that a disconnect might exist between espoused and enacted values. For example, while

staff members, ranging from field staff to senior leaders, often spoke of the importance of implementing initiatives regarding systematizing client data collection and analysis, when asked to respond to a survey soliciting their ideas about this topic, response rate, particularly from those in senior leadership positions, was quite low. Overall, the response rate from staff members was a little over 50%. The response rate amongst SST members, however, was lower than that, as only 3 out of 7 SST members responded to the survey. Figure 8 shows the number of staff members in each category that responded in comparison to the number of staff members in each of those categories whose opinions and thoughts were solicited.

Figure 8: Numbers of respondents to staff survey regarding customer satisfaction data, categorized by role at EL.



The disconnect also existed between levels of the organization, as senior leaders had adopted the implementation of systematic client satisfaction feedback loops into the organization wide goals for FY14, but Regional Directors did not necessarily agree that a

systematic approach to this data collection would be beneficial. One Regional Director commented:

Surveys are not going to get the feedback we want. They won't provide the opportunity to really dig deep because people will just wonder, why is this a 2, why is this a 3. Of course we'd love the information in the aggregate, it wouldn't hurt to have the information, but I'm unsure of what will become of it and how numbers and data might be used to make decisions absent judgment and knowledge. For example, a school might be dissatisfied with the work of a School Designer and on a survey mark this dissatisfaction. But the school has lots of leadership problems, a tough context, so it makes it difficult for the School Designer to perform really quality work. (Personal Communication, October 31, 2013).

Additionally, as previously stated in this Capstone, Expeditionary Learning is in a period of tremendous growth and diversification. This period has led to a saturation of new initiatives across the organization and amongst various departments. As one senior leader at EL points out, "EL seems to suffer from 'shiny object syndrome,' and I could list off 10 to 15 new initiatives, processes or structures that have been introduced in the last several months," (Personal Communication, January 2013). While it was clear that the organization wanted to adopt changes to streamline processes, such as the focus of this strategic project, the introduction of too many initiatives has the potential to lead toward fatigue, weariness, and a sense of overwhelm on the part of the staff tasked with carrying out and adopting said initiatives.

The idea of too many initiatives came up at several times throughout my residency, often as a cause for hesitation around full adoption of a continuous improvement process. One Regional Director pointed out that he did not think it would be possible for the organization to adopt a consistent national survey this year stating that it would be too hard to implement given the number of other pieces of work that rested

on the plates of School Designers and Regional Directors (Personal Communication, November 4, 2013). This was further made evident as Regional Directors wavered to fully adopt and stand behind the administration of the national client feedback survey, until the Chief Schools Officer, on behalf of the organization, issued a directive regarding its administration. In an effort to provide rationale for this hesitation, the Chief Schools Officer offers the following thoughts, “We are at a point in time, both in the cycle of the year and overall in EL’s organizational growth that people have ‘new stuff fatigue’. We could list out about 15 new structures, systems, new protocols that were or are in the midst of rolling out and this was just one more thing,” (Personal Communication, February 13, 2013).

III. Centralization vs. Autonomy

a. Collaboration with Regional Directors

The third and final category of my work focused on addressing the tension between the autonomous regions within EL and the more centralized authority of the national organization. This focus area proved to be quite challenging and it is difficult to report that the intended outcomes of my actions were achieved. Activities in this category ranged from participating in meetings with Regional Directors to discuss implementing consistent national practices around client feedback data collection to forming a collaborative team to engage, alongside me, in the work of implementing a continuous improvement process.

The calls and meetings I joined with Regional Directors offered an opportunity to informally push forward the idea of a national client feedback survey. During the months of October through December of 2013, I joined several Regional Directors as they

discussed how the Mid-Year Review process might be systematized and made consistent across all regions in the organization. We crafted several scenarios that outlined how a nationally consistent Mid-Year Review process would look in the variety of schools that exist in EL's Whole School Network. Those scenarios can be seen in Table 6 and show that each scenario included the idea of a standard client feedback survey.

These ideas were presented to the entire group of Regional Directors, the Chief Schools Officer, and the Managing Director of School Support, but organization wide adoption did not occur, due to a variety of reasons including poor timing, already existing structures superseding new ideas, and lack of capacity, motivation, and desire to implement an entirely new process of mid-year reviews. Successive meetings with Regional Directors indicated their preference with piloting a standard client feedback in one or two regions, due to Mid-Year Review processes already under way.

Table 6: Mid-Year Review Process Scenarios by School Tier

	<i>For what kind of school</i>	<i>A MYR for this kind of school would be:</i>
Tier 1 (easy)	Schools where we are ready to talk just about the work: • Partnership conditions are in place as indicated by the School Rubric • Check on the work and its progress • Eventually -- mentor and credentialed schools, are also along the credentialed path -- meet benchmarks as per the credentialing doc • Year 2+ school	• Half-day focus learning walk around the work plan goals with leadership and some staff involvement (includes set-up of the focus, visiting of classrooms to look for evidence, debrief conversation that gets to analysis with implications for the rest of the year and the work plan going forward). • Learning Walk team includes: SD, Instructional Leader, some staff, etc. • Prior to the mid-year review, client satisfaction survey (including what about the SD-school relationship working or needs work, what about the professional development institutes fit their needs) - prior to the mid-year review survey ○ With option for more in-depth conversation • A report out about the findings and discussion of the MYR (feedback to faculty, etc.) <i>*RD does not need to be present</i>

Tier 2	Schools that need some serious attention (affiliate year, heavy-lift, IR scores behind the credentialing path). Partnership conditions are largely in place.	Brainstorm level ideas here: • 1-Day focus learning walk around the work plan goals with leadership and some staff involvement (includes set-up of the focus, visiting of classrooms to look for evidence, debrief conversation that gets to analysis with implications for the rest of the year and the work plan going forward). • Learning Walk team includes: SD, Instructional Leader, some staff, etc. • A conversation about the Partnership Success Indicators • Prior to the mid-year review, client satisfaction survey (including what about the SD-school relationship working or needs work, what about the professional development institutes fit their needs) ◦ With option for more in-depth conversation • A report out about the findings and discussion of the MYR (feedback to faculty, etc.) • Some kind of inclusion of the RD (call into the debrief, follow-up call from the review) - keep eye on the strategy threads <i>*RD does / does not need to be present for this MYR?? - budget implications...?</i>
Tier 3	Schools that have serious partnership conditions or results: • Issues - defined by? • Issues that are hampering EL implementation - need to be raised by EL staff so that all parties can have honest and difficult conversations in order to get back on track.	Can we identify these schools by mid-November? • 1-Day focus learning walk around the work plan goals with leadership and some staff involvement (includes set-up of the focus, visiting of classrooms to look for evidence, debrief conversation that gets to analysis with implications for the rest of the year and the work plan going forward). ◦ Learning walk focuses slices of the IR relevant to the work plan • Learning Walk team includes: SD, Instructional Leader, some staff, etc. • A conversation about the Partnership Success Indicators • Prior to the mid-year review, client satisfaction survey (including what about the SD-school relationship working or needs work, what about the professional development institutes fit their needs) ◦ With option for more in-depth conversation • A report out about the findings and discussion of the MYR (feedback to faculty, etc.) • Some kind of inclusion of the RD (call into the debrief, follow-up call from the review) - keep eye on the strategy threads • Includes option to add:

		○ Focus groups (teacher, students) ○ Participation (e.g., in the learning walk) and /or conversations at higher level (board, district) stakeholders ○ Surveys of students <i>*RD must be present</i>
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b. Nationally Consistent Feedback Survey Administered

As the original intent and goal of this strategic project, which was to increase consistency in quality of delivered services and programs across the entire organization, I felt that a small, piloted survey would not help to reveal discrepancies across regions and would not provide the necessary information to begin making informed decisions regarding programming and delivered services across the entire organization. Additionally, a smaller, regionally based pilot of the survey felt much like what was already occurring and that a change large enough to impact organization wide practice would not occur. Following my meeting with the small group of Regional Directors, I consulted with the leadership at a higher level and shared my thinking. Ultimately, through the insistence and direction of the Chief Schools Officer, the national client feedback survey was designed and administered.

c. Forming of Cross-Functional Team

Another way in which I attempted to cut across boundaries that existed and promote long-term adoption of both a particular data collection initiative and a continuous improvement process was to seek out a cross-functional, collaborative team. Once I had received approval for the implementation of a continuous improvement process, I pursued the prospect of forming a collaborative team. This involved determining which staff members would both benefit the team from their involvement and potentially receive benefits themselves from being involved. It was essential that the

team represent a cross section of staff positions at EL, that the voice of the field was heavily represented in the team, and that members of the team possessed an interest in data collection and analysis. With the help of my supervisors, I created a list of staff members whom I thought met all of the aforementioned criteria and proceeded to solicit their involvement in this team.

The majority of my communication with potential team members happened through email and, on the rare occasion, such as EL National Conference, that I was in the presence of other staff members, I sought to have face-to-face conversations. My approach to establishing this team involved several layers of solicitation. I first approached (via email) those staff members that I had previously met and with whom I had established a connection and who also occupied Director level positions in the organization. I was also aware that staff members in Director level positions had more flexibility and control over their schedules, allowing them more opportunities and room to participate in groups not necessarily associated with their core functions. Emails to these staff members outlined the nature of my project, the vision for a team, and a specific ask for time (see Team Request Email - Directors in Appendix M). I leveraged the relationships I had formed with these Directors and their interest in becoming part of the working group to request the participation of staff members with whom I did not already have an established connection. These were field staff members who did not enjoy the same flexibility and control over their schedules as directors did as their schedules were mostly determined by contract size with schools and the time allocations associated with those contracts. Because I did not have direct relationships with field staff, I asked the Director of School Designer Support, who had previously expressed

interest in participating in my working group, to send a letter to School Designers on my behalf (see Team Request Email – Field Staff in Appendix N).

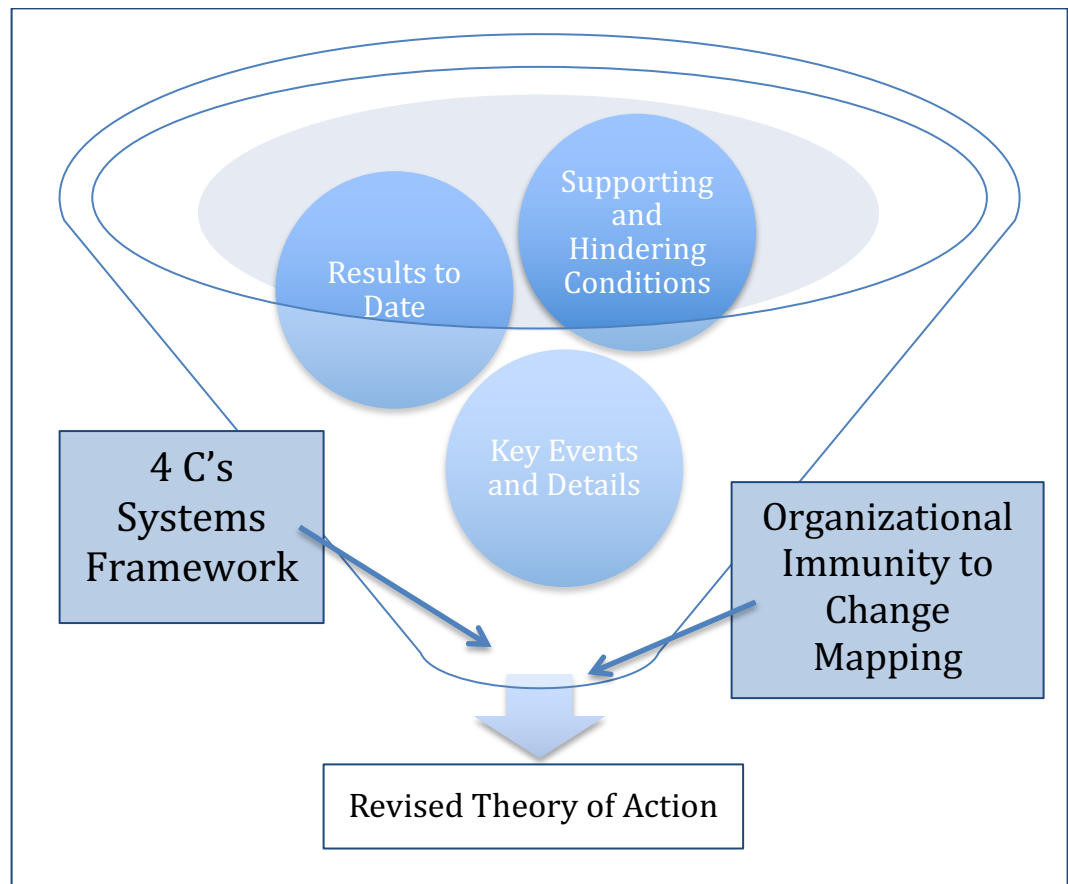
Unfortunately, this is the extent to which team formation was tackled as part of the implementation of this strategic project. While several directors expressed their belief in this work being important and the formation of a cross-functional team equally important, many of them stated that they preferred to receive periodic updates rather than being an actual member of the team. Additionally, the request for field staff participation never went out because field staff participation in this type of group, “had great implications for allocations. Because allocations decisions had already been made, field staff will likely not even have the 5 hours per month available in their schedules that is required to be a part of the team,” (Personal Communication, October 2013).

Analysis of Strategic Project

“One of the hardest aspects of charting the change course, and one often left out of the planning and implementation process, is identifying the ways that we might also create obstacles that get in the way of our own plans. This idea might initially seem a bit strange. Could it really be that we, the leaders, the ones focusing so much of our energy and effort on leading the charge, might actually be acting in ways that frustrate our commitments, hamper our progress, foil our plans?” (Wagner, Kegan, Lahey, Lemons, Garnier, Helsing, Howell, and Thurber-Rasmussen, 2006, p. 55)

In order to analyze and understand why this strategic project unfolded as it did and why I achieved the results to date, it is important to revisit what I outlined, based on the research, as potential supporting and hindering conditions to implementing a continuous improvement process regarding the collection, analysis, and use of client feedback and satisfaction data. In reviewing these conditions, uncovering the underlying assumptions and organizational factors that enabled leveraging of the supporting conditions is a critical step. Understanding how and why the hindering conditions played out is equally important. In order to do so, and in an attempt to identify the ‘obstacles’ previously mentioned in the quote from *Change Leadership: A Practical Guide to Transforming Our Schools* (Wagner and Kegan, et al, 2006), I will utilize two lenses: The 4 C’s Framework (Wagner, Kegan, et al, 2006) and Organizational Immunity to Change Mapping (Kegan and Lahey, 2009). I have conceptualized this as a clarifying process, with the two lenses serving as filters through which I can examine the following: supporting and hindering conditions, and key events, details, and evidence from the implementation of my strategic project. By conducting the analysis in this way and applying these two lenses, I aim to reach a revised Theory of Action. This revised Theory of Action may serve the site and sector in future iterations of similar work. Figure 9 provides a visual representation of this conceptualization.

Figure 9: Approach to analysis



4 C's Systems Framework

The 4 C's Systems Framework (Wagner, Kegan, et al, 2006) offers an analytical structure to understand the interdependence of the multiple variables operating to form a system and how the numerous components of work in that system are intertwined. In order to apply this framework it is first important to understand what constitutes a system and systems thinking. Peter Senge (1994) defines the system as a, “perceived whole whose elements ‘hang together’ because they continually affect each other over time and operate toward a common purpose,” (p. 90). Furthermore, Wagner, Kegan, et al (2006) add, “A system runs on its own momentum and all its parts work together to keep it going. The interactions of these parts naturally create some kind of product or

result. In fact, your system – any system – is perfectly designed to produce the results you’re getting,” (p. 106). The task of keeping the entire system, or the ‘whole’ in mind when attempting to initiate change is important as Wagner, Kegan, et al (2006) offer the following explanation regarding systems thinking, “Systems thinking is about trying to keep that “whole” in mind, even while working on the various parts. More ‘ecological’ than logical, it recognizes that simple linear cause-and-effect explanations sometimes miss the fact that today’s effect may turn into tomorrow’s cause, influencing some other part of the system,” (p. 97).

In applying this framework to the implementation and results of my strategic project the goal is to understand the situation into which I was entering, and how the conditions, culture, and competencies present in the organization led to the results achieved. In their book *Change Leadership: A Practical Guide to Transforming our Schools*, Wagner and Kegan, et al (2006) outline and provide definitions for the four areas of the 4 C’s Framework: context, conditions, culture, and competencies. The definitions they provide were originally conceptualized to apply to the work of transformation in schools and districts. However, these same concepts can be extrapolated and transferred to the work of an organization like Expeditionary Learning.

Figure 10 provides a snapshot of the application of this framework to the situation into which I entered. It provides bulleted points of both the strengths and challenges inherent in each of the four categories: context, conditions, culture, and competencies. A crucial step in applying this framework is clarifying the goal of the change, which is located at the intersection of the three circles: conditions, culture, and competencies. In this particular situation, the goal is twofold. The first aspect of the

goal is to improve how client feedback is gathered, analyzed, used, and disseminated.

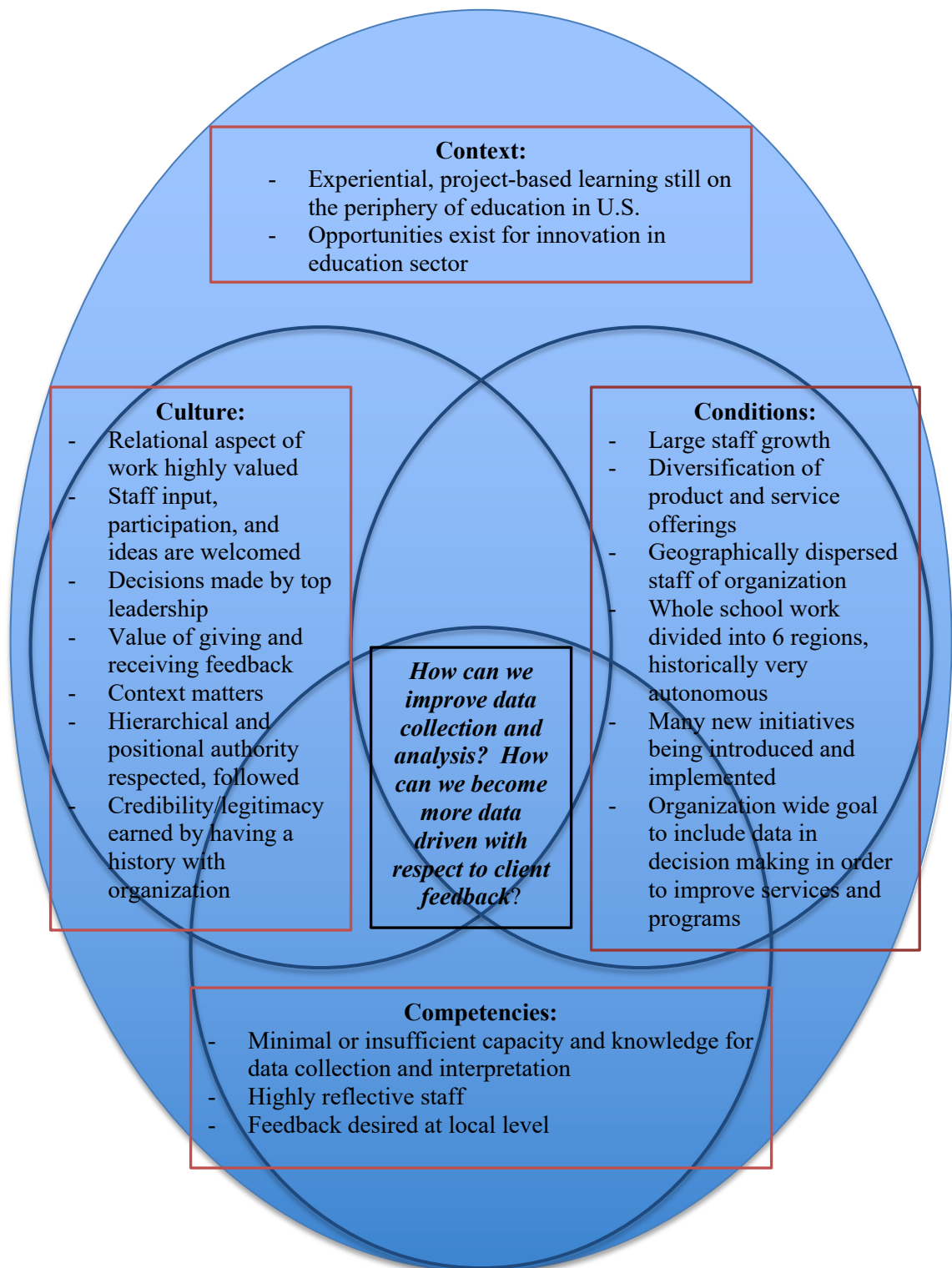
Building on that, the second aspect of the goal is for Expeditionary Learning to become more data-driven, with client feedback serving as one source of data. In subsequent sections I will provide detailed analysis regarding each of the four categories to supplement the snapshot provided in Figure 10.

I. Context

In the 4 C's Framework, the term context refers to the external and broader environment in which an organization exists or within which the work is being done. Specifically, this includes the social, historical, and economic contexts in which work is being done and change efforts are to take place (Wagner, Kegan, et al, 2006). It is important to understand context because organizations do not operate inside vacuums, and often there are many external factors at play, influencing decisions, pushing work in certain directions, and placing demands on staff. Wagner and Kegan, et al, (2006) add, "Contexts also refers to the larger organizational systems within which we work, and their demands and expectations, formal and informal... We need to understand all this contextual information to help inform and shape the work we do to transform the culture, conditions, and competencies..." (p. 104).

In the case of Expeditionary Learning, the organization historically has promoted models of teaching and learning that remain on the periphery of education in the United States. While support for experiential, project-based, real-world learning is growing and the ideas behind this type of pedagogy are gaining momentum, this approach to instruction occupies a relatively small market share of the education sector.

Figure 10: 4 C's Framework Applied to Expeditionary Learning and Strategic Project Implementation



At the same time, opportunities for innovation abound within the education sector. EL has seized some of these opportunities in promoting an innovative and novel whole school model and in modifying and expanding existing models, products, and services to meet the needs of a broader audience and begin to occupy a greater market share in the education sector.

As the majority of EL's work is client facing, it is important to understand the role that the external context plays in this situation. At the very basic level, in order to expand its client base and continue to grow its market share, EL needs to provide evidence that the work it is doing, whether in the "Whole School" domain or in other areas, is successful, in both meeting the needs of its clients and in impacting student outcomes. In the case of EL, it seems that meeting the needs of clients is a potential precursor to impacting student outcomes. In order to provide this evidence, EL needs to first assess whether or not it is actually meeting its clients' needs and make necessary course corrections when data shows otherwise. I believe it was the acknowledgement of this need and the fact that in order to expand its market share, EL would first need to prove it was and is successful in the segment that it currently occupies, on the part of senior leadership that made room for my strategic project and for its inclusion in the FY14 Organization Wide Goals (for a complete listing of these goals, see Appendix F).

II. Competencies

Wagner and Kegan, et al, (2006) define competencies as, "The repertoire of skills and knowledge that influences student learning," (p. 99). In this instance, with regard to EL as an organization, I apply the term competencies to the staff's skills, knowledge, and characteristics that influence and affect their work. However, while staff

competencies are extremely important for effective work, they cannot be the sole focus.

Wagner and Kegan, et al (2006) continue to say, “Skillful, competent adults are a foundation of this work... But we have come to understand the limits of competency building as a stand-alone strategy for change. Even with a focus on improving instruction, developing educators’ competencies is necessary but insufficient for reinventing schools,” (p. 99).

Evidence points to staff exhibiting the competencies necessary to implement the type of change for which my strategic project. These competencies include a desire for feedback, a willingness to engage in giving and receiving of feedback, and basic skills and knowledge for examining data at a localized level.

Staff members and the organization, in general, pride themselves on the value they place on giving and receiving feedback and on reflection of practice. This value became ever more clear upon administration of the staff wide survey regarding the client satisfaction data initiative. While all staff members whose input was requested did not respond, those who did provide responses agreed unanimously that EL should collect client satisfaction data. When asked to provide a rationale for their responses, staff member responses centered on the following key themes: 1) gathering feedback from clients is an essential process for an organization offering services and products, 2) feedback from clients is essential to continued growth and improvement, and 3) gathering feedback is woven into the fabric of the functioning of EL. Specific responses included:

- “Any organization that provides services to clients and maintains quality and validity in the market engages in feedback cycles.” (Senior Support Team member)
- “Without client feedback, we are ‘dead in the water’. It is essential for us to know what our clients desire in terms of products and how they feel in terms of the services we offer.” (Senior Support Team member)
- “Being clear about our goals, receiving feedback, reflecting, and revising are deeply built into how EL functions.” (National Level Director)
- “Client outcomes, including experience and satisfaction, are a main component of the work we do. Clients should feel, and more importantly know based on evidence, that our partnerships are beneficial. This will help ensure that our work has traction and that we have a sustainable model.” (School Designer)
- “We offer sessions on growth-producing feedback. It would be silly of us not to own that mindset for ourselves!” (School Designer)

The underlying rationale provided by the variety of staff members varies from maintaining validity in the market to meeting client needs to engaging in improvement and reflection. Yet, all responses indicate that, at some level, there is a widely held commitment, amongst staff members, toward gathering feedback from clients regarding the products and services that EL offers.

Staff survey responses also indicated a desire for consistent protocols and structures once data were collected. As presented earlier in this Capstone’s Results to Date section (see Figure 7: How can EL enhance its collection of client satisfaction data?), in a question asking how EL’s collection, analysis, and use of client feedback

could be improved or enhanced, the number one choice amongst staff providing responses was ‘structures, processes, and protocols for analyzing, disseminating, and acting on client satisfaction data.’ While staff members were able to select more than one choice for this particular question, this particular choice garnered 32 selections amongst the 47 staff members who responded to the survey.

A survey administered to Institute Keepers, the staff members responsible for planning and managing the design process of EL’s National Professional Development (PD) Institutes, also indicated an appreciation for the data collected by the participant surveys given at the close of the National PD Institutes. Many also reported that while they felt they possessed the requisite skills and knowledge to look at these data on a preliminary and surface level, the process could be strengthened by the introduction of protocols for analyzing data, structures for looking at multiple sets of data, and further training on examining data in the aggregate. One Institute Keeper responded, “I don’t know who the person is who would do this, but it would be useful to have the data organized for us and perhaps share over time. Right now, it’s hard to track patterns. Has that same outlier comment been made every year? Is there a difference in how the Institute is perceived based on location? Facilitator?” (Personal Communication, November 2013).

Other Institute Keepers responded with their desire for consistent structures and guiding practices when examining the data. When asked how the Institute revision process could be enhanced or changed, one Institute Keeper said, “[Include] a pre-scheduled time, say two weeks post Institute, that was set for a focused protocol on revisions with notes and action steps. I would appreciate the structure,” (Personal

Communication, November 2013). Another desired a more formalized process as he/she offered, “Maybe make it a part of the formal structure for Institute revision. It seems a bit informal now,” (Personal Communication, November 2013).

Moreover, in early conversations with senior leaders at EL, it became clear that while staff members were capable of looking at data on a localized level, there was a need to bolster the skills and knowledge for examining larger datasets, analyzing aggregate data (rather than localized or individualized instances), and determining trends across the entire organization. When asked how EL could improve its approach to data collection and analysis, one senior leader said:

Sometimes it feels like we’re just going through the motions because we feel like we should do evaluations. But if we have real questions that are connected to think that we want to improve or theories of action that we’re trying to see if they get born out, it would make a lot of sense... I also don’t think that anyone has that sort of an evaluation type of mindset, in terms of how do you build a systematic process for evaluating something. I know that kind of person, that kind of thinking hasn’t gone into how those survey monkey tools are created or what happens to the information that is gathered. (Personal Communication, September 2013)

III. Conditions

Wagner and Kegan, et al, (2006) describe the aspect of conditions in the 4 C’s Framework as, “The external architecture surrounding student learning, the tangible arrangements of time, space, and resources,” (p.101). In the case of Expeditionary Learning and my strategic project, this definition of ‘conditions’ does not apply entirely as is and, as such, is in need of modification. In applying the framework to the organization and this particular strategic project, I interpreted ‘conditions’ to be the internal circumstances, the characteristics of the organization, and the key events that affect and shape what and how work is conducted.

The organization, for the majority of its existence, has largely focused on its “Whole School” work, growing a small network of schools that fully embrace and implement the Expeditionary Learning model. To that end, as noted in this Capstone’s introduction, up until 2009, most revenue was generated and directed toward this line of business. Unfortunately, this strategy seemed to be leading Expeditionary Learning down a path of fiscal insolvency. The organization therefore sought to increase its market share in order to maintain fiscal solvency and increase recognition of its brand.

This expansion seemingly came about as a twofold strategy: strengthening the existing brand (translating to the strengthening of existing work in the “Whole School” line) and diversifying and expanding the brand (translating to the writing of CCSS aligned ELA modules, the implementation of accompanying professional development and school-based coaching, and the publication of toolkits and books to a broader audience). The expansion, growth, and diversification has left the organization facing a great deal of change, including the addition of many new staff, the creation of new staff positions, development of new product and service offerings, and a growing focus on operations. A focus on operations was not something the organization historically applied much time and resources toward, mainly for lack of necessity and somewhat due to lack of existing staff members’ knowledge, prior experience, and capacity.

The new focus on operations and systematizing many processes and structures to occur organization wide allowed for the introduction of new initiatives, such as the focus of my strategic project. However, at the same time that this new initiative was being introduced, so too were others across multiple parts and departments of the organization. This saturation of new initiatives makes it difficult for any one of those to gain

organization-wide traction and affect change in meaningful ways across the organization. In the case of this particular initiative regarding client feedback collection and analysis, there were aspects of the initiative that were more easily adopted than others, such as the more technical facets like designing a survey, administering a survey, and engaging in individual analysis of the data gathered. Other facets of the initiative, which might be seen as more adaptive, practice-shifting, and requiring deeper organizational commitment; such as forming a cross-functional team, engaging in collaborative sense-making of the data, and examining organizational practices through the lens of the data have yet to occur. This leads to the belief that the organization was ready for some aspects of the initiative (the more technical aspects) while not yet ready for those aspects that might be considered more adaptive. A deeper analysis as to why this condition exists in the organization with regard to the implementation of this project will occur in subsequent sections within this Strategic Project Analysis.

IV. Culture

Wagner, Kegan, et al (2006) define culture as, “The shared values, beliefs, assumptions, expectations, and behaviors related to students and learning, teachers and teaching, instructional leadership, and the quality of relationships within and beyond the school,” (p. 102). Even though this definition refers specifically to work happening in schools, involving teachers, students, and instructional leaders, much of it can be extrapolated and transferred to EL as an organization and the work it conducts, particularly the work related to my strategic project. As Heifetz, Grashow, and Linsky (2009) say, “An organization’s culture is made up of its folklore (the stories that people frequently tell that indicate what is most important), its rituals (such as how new

employees are welcomed into the company), its group norms (including styles of deference and dress codes), and its meeting protocols (like modes of problem solving and decision making). All of these cultural ingredients influence an organization's adaptability," (p. 57). In this sense, the definition could be tweaked to read: culture refers to the shared values, beliefs, assumptions, expectations, and behaviors present in the organization and in the work it conducts, whether these aspects are explicitly stated or remain implicit. It is important to understand these explicit and implicit cultural aspects because, "Adaptive leadership requires understanding the group's culture and assessing which aspects of it facilitate change and which stand in the way," (Heifetz, Grashow, and Linsky, 2009, p. 57).

The relational nature of EL's client facing work is something that is a source of pride amongst EL staff members and the organization in general. Many EL staff members, particularly those that are client facing, such as School Designer Coaches and Regional Directors, characterize the majority of their work as highly relational, in that it relies on the building and leveraging of strong relationships in service of work. They find this to be a great source of value. While this relational piece is an important aspect of the work, it is often hard to quantify and evaluate in an objective manner. As relationships can often get messy and complicated, the work of school designing and leadership coaching that stands on the foundation of those relationships might become equally messy and complicated. Regional Directors voiced concerns that a systematic, nationally consistent evaluation system would allow for effective and objective evaluation of this work, that can often get messy and complicated.

Regardless of this trepidation and hesitation around nationally consistent and systemic methods for gathering feedback, the act of gathering feedback is one that is highly valued in the organization. Responses on staff surveys, conversations about this initiative, and informal exchanges with various staff members overwhelmingly point to the organization being viewed as having a “Feedback culture,” (Personal Communication, October 2013, November 2013, December 2013).

The way in which decisions are made in the organization played a large role in the implementation of this initiative. Decision-making processes involve staff input on a variety of levels, but final decisions and communication of those decisions generally rests in the hands of those that hold hierarchical and positional authority. In the case of this strategic project, input was gathered from staff at a variety of levels and incorporated into the work I was completing. However, lacking positional authority, I relied heavily on senior leaders when it came to pushing my initiative forward and implementing any major policy or organizational norm changes. This particular initiative, when implemented strongly and powerfully (meaning data would not only be solicited, it would be used thoughtfully and consistently), would potentially have major implications for the organization as a whole. In the end, I was able to those aspects of the initiative that did not require large changes to organizational policy or norms.

Examining the strategic project through the lens of the 4 C’s Framework offers an opportunity to uncover how the organization was in desperate need of change in this arena and what aspects of the organization allowed for elements of this change, albeit the more technical ones, to take place, if slowly and not necessarily as planned. It essentially surfaces how the supporting conditions necessary for implementing a

continuous improvement process were present as espoused values in the organization prior to and for the duration of the strategic project. Utilizing the 4 C's Framework also offers an opportunity to surface those aspects of the organization that prevented the change from taking place as planned and in a smooth, uninterrupted fashion. In this sense, it illuminated how the hindering conditions played a role in the implementation of this strategic project.

While this framework provides a fairly complete picture of how the supporting and hindering conditions, previously outlined in this Capstone's RKA, played out, there is an opportunity and a need to dig a little deeper. For the sake of this analysis and in an effort to gain an even deeper understanding, it is important to uncover why these hindering conditions exist in the organization and throughout the implementation of this strategic project. Why was the implementation of this strategic project not straightforward in an organization that is seemingly committed to consistent, systematic data collection and analysis? What prevented broader, systemic change from taking hold? In the subsequent sections, I will seek to uncover where the barriers to adaptive change lie.

Adaptive versus Technical Change

As previously noted in previous sections of this Capstone's analysis, the more technical aspects of this strategic project, such as designing a survey and administering it, were more easily implemented than other aspects of the project that might have required more adaptive change. Heifetz, Grashow and Linsky (2009) describe the difference between adaptive challenges and technical problems as such:

While technical problems may be very complex and critically important (like replacing a faulty heart valve during cardiac surgery), they have known solutions that can be implemented by current know-how. They can be resolved through the application of authoritative expertise and through the organization's current structures, procedures, and way of doing things. Adaptive challenges can only be addressed through changes in people's priorities, beliefs, habits, and loyalties. Making progress requires going beyond any authoritative expertise to mobilize discovery, shedding certain entrenched ways, tolerating losses, and generating the new capacity to thrive anew. (p. 19)

Table 7 below clearly articulates the distinctions between technical problems and adaptive challenges, delineating what is required of solutions and where, within the organization, the work lies.

Table 7: Technical problems versus adaptive challenges

Kind of Challenge	Problem Definition	Solution	Locus of Work
Technical	Clear	Clear	Authority
Technical and adaptive	Clear	Requires learning	Authority and stakeholders
Adaptive	Requires learning	Requires learning	Stakeholders

Source: Heifetz, Grashow, Linsky, 2009, p. 20

In the case of this strategic project, because technical solutions were carried out that were clear and relied on the exertion of authority to implement, the issue at the heart of the strategic project was treated as a technical challenge. However, according to Heifetz, Grashow, and Linsky (2009), the issue at hand could be seen as a more adaptive challenge. The authors lay out a basic framework by which an adaptive challenge can be identified. In Table 8 below, I use this framework to recognize the aspects of this strategic project that more clearly identify with elements of an adaptive challenge, as laid out by Heifetz, Grashow, and Linsky (2009).

Table 8: Identifying an adaptive challenge

Concept	Identifying Flag	Present in EL/Strategic Project
Persistent gap between aspirations and reality	The language of complaint is used increasingly to describe the current situation	• Language used to describe EL's data collection initiatives often refers to gaps, areas for growth, and a need for improvement
Responses within current repertoire inadequate	Previously successful outside experts and internal authorities unable to solve the problem	• National Client Feedback Survey created as 'solution' but does not make changes to system, not connected to anything broader than one survey • Likely that similar issue or questions will arise after completion of residency
New stakeholders across boundaries need to be engaged	Rounding up the usual suspects to address the issue has not produced progress	• Lack of engagement of cross-functional stakeholders with regards to this issue and the implementation of this strategic project
Longer time frame necessary	Problem festers or reappears after short-term fix is applied	• National Client Feedback Survey created as 'solution' but does not make changes to system, not connected to anything broader than one survey • Likely that similar issue or questions will arise after completion of residency.

Adapted from Heifetz, Grashow, and Linsky, 2009, p. 74

Table 8 shows elements of this strategic project that were implemented successfully, areas of the strategic project that failed to take shape, and conditions in the organization present during the implementation of the strategic project. As outlined in Table 8, the elements of the strategic project that were implemented, while important and essential, do not offer the necessary solutions to the larger issue at hand because they are technical solutions at best. The Chief Schools Officer, when discussing the National Client Feedback Survey and the idea of broader, systemic change within the organization, recently commented that I was successful at, "Creating and implementing another tool, a useful and different tool than we had previously had, but still, just another tool," (Personal Communication, February 2014). As he said, the tool that was created, a National Client Feedback Survey, is useful and important, but does not necessarily

make the changes to the system that are necessary to make EL a more data-driven organization and one that systematically and consistently examines data across the entire organization. Kegan and Lahey (2009) offer, "...Many, if not all, of the change challenges you face today and will face tomorrow require something more than incorporating new technical skills into your current mindset. These are the 'adaptive challenges,' and they can only be met by transforming your mindset, by advancing to a more sophisticated stage of mental development," (p. 29).

In order to understand what prevented broader adaptive change from taking place, I will examine the implementation of this strategic project through the lens of Organizational Immunity to Change Mapping (Kegan and Lahey, 2009). Using this lens offers an opportunity to examine why an organization that states it is committed to becoming more data driven and systemically and consistently using data across the organization, experienced difficulty in moving beyond technical solutions to the issue.

Organizational Immunity to Change

Engaging in the Immunity to Change (Kegan and Lahey, 2009) mapping process offers an opportunity to see the ways in which the system is actively preventing the very change it wishes to make. By applying this framework to Expeditionary Learning and the implementation of this strategic project, I am able to outline the organization's stated collective commitments (column 1), list the behaviors that the organization and its staff engage in that are either in support or in contention with the collective commitments (column 2), specify the organization's competing commitments (column 3), and uncover what big assumptions those competing commitments might point toward (column 4). Table 9 showcases the Organizational Immunity to Change map applied to

Expeditionary Learning and the implementation of this strategic project.

Table 9: Organizational Immunity to Change map applied to EL and implementation of strategic project.

1 Collective Commitments	2 Fearless Organizational Inventory (Doing/Not Doing)	3 Collective Competing Commitments	4 Collective Big Assumptions
- Changing the way data, specifically feedback and satisfaction data from clients, is gathered, analyzed and used. - Gathering, analyzing, and using satisfaction and feedback data from clients in a systematic and consistent way across the entire organization to inform decision-making and increase the consistency of quality of delivered services and programs.	- We engage in different practices regarding feedback collection and analysis depending on the region and department - We do not provide staff capacity toward the resolution of this issue - All leaders do not offer input on elements of the strategic project - We carry the idea that a “systemic survey is not best tool, conversations will allow for better digging and understanding” - We say that the work of School Designer Coaches is complicated and messy and difficult to systemically evaluate - We keep any feedback gathered at a local level - We engage employees in discussion, but rely on positional authority and hierarchy to make ultimate decisions	- We are committed to maintaining the autonomy of our regions and limiting centralized oversight - We are committed to designing new tools to add to the system rather than reimagining the system - We are committed to designing new tools/systems without the input and participation of a variety of staff members - We are committed to maintaining positional authority and hierarchical boundaries	- We assume that if we create a more centralized system of data collection and analysis, we will lose the autonomy of our regions - We assume that if we design new tools to add to the existing system, we can maintain the autonomy and freedom to which we have been privy.

As evidenced by the sheer fact of my strategic project existing, it is clear that the organization has a strong desire to change the way data, specifically feedback from

clients, is gathered, analyzed, and used. Moreover, the organization has a desire to gather, analyze, and use satisfaction and feedback data from clients in a systematic and consistent way across the entire organization to inform decision-making and in an effort to increase the consistency of quality of delivered services and programs. As an espoused desire, this is evidenced by the fact that the focus of my strategic project was included in the FY14 organization wide goals.

Unfortunately, as is often the case in organizations that are experiencing periods of tremendous growth and change, these espoused commitments exist in an environment of behaviors and beliefs that do not necessarily fall in line or support the espoused commitments. Column 2 of Table 9 outlines the behaviors and beliefs that exist in the organization and in the scope of my strategic project that ultimately fight against the espoused commitments of column 1. These behaviors include:

- Engaging in differing feedback collection and analysis practices across regions and departments
- Not providing staff capacity toward the resolution of this issue
- Not offering input on elements of the strategic project, when requested
- Believing that a systemic collection mechanism will not capture the nuances of the work
- Believing that the work of School Designer Coaches is complicated and messy and, therefore, difficult to evaluate
- Keeping feedback gathered at a local level

Detailed evidence regarding these behaviors can be found in the Results to Date section of this capstone.

The behaviors listed above and in column 2 of Table 9, when examined next to the organization's espoused commitments, point toward the existence of underlying competing commitments. These are commitments that are held by the organization that lie in direct contention with the espoused commitments of column 1. These competing commitments stand in the way of true change happening in service of accomplishing the espoused commitments. So even though the organization is committed to changing the way data, specifically feedback from clients, is gathered, analyzed, and used and is committed to gathering, analyzing, and using satisfaction and feedback data from clients in a systematic and consistent way across the entire organization to inform decision-making and in an effort to increase the consistency of quality of delivered services and programs, the behaviors and beliefs of column 2 and the competing commitments of column 3 paint a different picture.

The competing commitments point toward an organization that actually seems committed to multiple priorities that do not necessarily allow for focus. Many of the competing commitments represent behaviors and beliefs that currently exist in the organization such as maintaining decentralized feedback collection mechanisms, maintaining current systems and processes regarding feedback collection and layering on more tools, and protecting the complicated and messy work of School Designers from potentially harsh or critical feedback. There are a variety of competing commitments listed in column 3 of Table 9, but for the sake of this analysis, I will focus on two competing commitments that provide a window of insight as to why the more technical

aspects of this strategic project were achieved, but greater adaptive change was seemingly resisted. These two competing commitments are:

- We are committed to maintaining the autonomy of our regions and limiting centralized oversight.
- We are committed to designing new tools to add to the system rather than reimagining the system.

The aforementioned competing commitments, when examined in light of a big assumption that rests behind those competing commitments, shed a little light as to what might be holding back the organization from truly examining its practices. From my own individual analysis of the situation and project, I believe these two competing commitments, when turned into big assumptions, highlight fears that exist in becoming an organization marked by increased centralized oversight. Given the evidence outlined in the Results to Date section of this Capstone, it is likely that these fears exist in various levels of the organizations, from School Designers to Regional Directors to Senior Level Leaders. These big assumptions seem to be related to fears or anxiety around losing the autonomy to which regions, and potentially schools, are privy. Additionally, fears around more centralized oversight leading to a loss of freedom, due to decreased autonomy might be underlying and driving these big assumptions.

It is important to note that these are some of many assumptions that could exist in this situation and closer examination of the organization's competing commitments is warranted. This closer examination of the organization's competing commitments and the process of completing an organizational Immunity to Change map should be

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completed by various members of the staff, including senior leaders. This would be an important next step in truly uncovering the big assumptions that lie at the heart of these competing commitments.

Implications: Self, Site, Sector

Implications for Self

*“To laugh is to risk appearing the fool.
To weep is to risk appearing sentimental.
To reach out to another is to risk involvement.
To express feelings is to risk exposing your true self.
To place ideas and dreams before a crowd is to risk their loss.
To love is to risk being loved in return.
To live is to risk dying.
To hope is to risk despair.
To try is to risk failure.
But risks must be taken because the greatest
Hazard in life is to risk nothing.
The person who asks nothing, does nothing.
Has nothing and is nothing.
They may avoid suffering and sorrow, but they
Cannot learn, feel, change, grow, love, live.
Chained by their attitudes, they are a slave
They have forfeited their freedom.
Only a person who risks is free.”*

- *Anonymous (Readings from the Hurricane Island Outward Bound School,
Rockland, Maine)*

I started my residency with Expeditionary Learning on July 1, 2013 and found the transition to the residency, both in general terms and into a geographically dispersed organization, to be challenging. My ingrained and learned propensity is to shy away from proactively seeking relationships and connections, taking risks in new situations, and putting my ideas and myself out in the open. Knowledge of the challenges of this transition, the difficult process of entering into a geographically dispersed organization, and my history of not being proactive, particularly in new situations, led to the identification of the focus of my personal leadership learning: advocating for myself, my learning, and my work.

In order to make progress toward this goal, I knew that it would require a great deal of risk taking. There would be risks involved in establishing relationships, in pushing my work forward, in asking difficult questions, and in advocating for my learning and my ideas. Through previous work in the EdLD program, I have identified that my tendency to shy away from proactively building relationships, risk taking, and self-advocacy, rests in the fears associated with these risks. Through previous Immunity to Change (Kegan and Lahey, 2009) mapping and work with peer and Executive Coaches in years one and two of the program, the reservations stem from fears of rejection, in the case of relationships, being viewed as less than intelligent, in the case of risk-taking, and being seen as not having it ‘all figured out’. While scary and daunting, I viewed the residency as an opportunity, after having uncovered the root causes of my fears and trepidations, to experiment and, ultimately, challenge them. I’ve come to realize, as the Anonymous author states, that in order to move forward, challenge the status quo, and learn, one must take risks and be bold. If not done, the risk lies in remaining stagnant, in the same place, and incapable of growth.

I first started on the path toward experimenting with this leadership goal by identifying ways in which I could advocate for myself. While I had initial thoughts on how I could advocate for myself, I continued to refine these thoughts and reflect on the experiences of experimenting with risk taking with regard to this leadership goal.

Early on in the residency, I established three categories in which I could advocate for myself: establishing connections and relationships, learning experiences, and project clarity. In Table 10, I outline what specific things I hoped for in each of those categories and the reasoning and rationale behind each of these wishes. Through work with my peer

coach, we determined that the best way to present these requests would be to narrow them, get specific, and provide a two-pronged rationale, with the first prong relating to the benefit to me and the second prong relating to the benefit to the organization.

Table 10: Plan for Advocating for Self

Category	Specific Hope	Rationale
Connections and Relationships	As a remote worker, I want opportunities to connect with other people in the organization	- Establish relationships - Learn about the organization and its history - Feel connected to a larger mission/vision and set of projects - Eventually lean on those connections to help with data collection
	Working remotely from my supervisor¹⁴, I want to determine the best and most effective ways to maintain consistent communication, contact, and connection with her	- Important to get questions answered - Do not want to feel like a nag, but have needs to be met - To understand how best to gain clarity on my work and move it forward
Learning Experiences	More involvement in SST meetings and leadership team member observations	- Benefit me as a student in an educational leadership program to observe and interact with a variety of the organization's leaders - Benefit the organization to have another voice to observe and ask questions
	Aside from my strategic project work, I would like to become involved in other teams and projects	- Being involved in other teams and projects will expand my knowledge base and experience - Involvement in other teams and projects will allow for connections to form to colleagues with whom I might not regularly interact - My voice on a team or project could serve as an element of diversity and alternative perspective - Tapping into my past experiences (as a teacher at an EL school, as a literacy specialist) might help the work of other teams
Project Clarity	Clarity around final vision and outcome of strategic project	It is important to know that, if I am successful, what does EL envision that to

¹⁴ At the time of identifying these categories and specific area in which I could advocate for myself, my supervisor was Stephanie Lawkins, former Chief Strategy Officer.

		look like?
	Team formation for completion of strategic project	• Forming and facilitating a cross-functional team will allow me to experiment and practice my leadership and project management skills • A cross-functional team will represent a variety of voices in the organization and will likely lead to greater organizational change

During the duration of my residency there were real moments of successful advocacy, in which I clearly stated my request and provided a rationale for said request. There were other times, however, of lack of success, and it is my goal, in this Implications for Self Section to determine what led to successful advocacy and less than successful advocacy in order to learn for future applications.

There were several key moments in which I felt the things I was advocating and pushing for came to fruition. Those are: 1) the inclusion of ‘client satisfaction feedback loops’ in the FY14 Organization Wide Goals, 2) a change in supervisors, 3) the design and administration of a national client feedback survey, and 4) personal learning and leadership opportunities. In examining these four instances, it is clear the themes that emerge as to why they are successful examples of self and work advocacy. The first three of these cases (instances 1, 2 and 3) are closely related to the implementation of my strategic project and without advocating for these things, I do not think my strategic project would be in the place where it is at the writing of this Capstone. The fourth instance, that which deals with personal learning and leadership opportunities, held deep personal meaning and implications for the way in which I was spending my time during residency.

In all four of these cases, regardless of the underlying personal rationale for seeking to advocate, each instance was met with success because of the steps I undertook and the relationships I leveraged in the process. In each instance, I expressed a specific ask, clearly articulated the benefits to the organization, and leveraged established and trusted relationships and connections.

In the instances of less than successful advocacy, there is a lot to be learned. The lack of success stems from the fact that the specific ask or request was not achieved, though this does not necessarily mean that advocacy was not successful. In some cases, after initial attempts at advocacy and meeting with lack of receptiveness from the organization, I simply stopped trying. This generally occurred because either the request did not hold personal meaning and implications or I felt the project could continue, albeit not as strongly, even if advocacy for specific requests failed.

In the end, in the instances regarding the implementation of the strategic project, I do believe that had I continued to advocate and push for these requests, the direction and impact of the strategic project would have greatly shifted. For example, as team formation seemed unlikely to occur, I accomplished much of the technical tasks of the strategic project independently, though with the support and guidance of my supervisors and mentors. Had I successfully advocated for the formation of a team to address the implementation of this strategic project, I think that more than just technical solutions might have been tackled.

While there is still a great deal to celebrate in terms of successes with regard to this strategic project (such as the implementation of a national client feedback survey and

the inclusion of client feedback data in the FY14 Organization Wide Priorities), given my analysis of the project using the lenses of the 4 C's Framework and the Organizational ITC Mapping, I feel I can learn a great deal to apply to a variety of future situations.

First, applying the 4 C's Framework offered a fairly clear picture as to the landscape into which I had entered in attempting to implement my strategic project. I think the application of this framework earlier in the life of my strategic project might have offered opportunities to understand the relatively low level of priority being placed on my project and the number of other commitments and priorities the organization was undertaking.

I also made several assumptions throughout the implementation of my project, which hindered my ability to push for more adaptive change and, in a sense, blinded me to anticipate some of the difficulties and challenges I would face in attempting to implement more adaptive change. I assumed that because I was able to get 'client satisfaction feedback loops' added into the FY14 Organization Wide Priorities and that my suggested approach was reviewed and given verbal approval, that all of the policies and changes I suggested to approach the project would also be easily adopted, including adopting a "National Client Satisfaction Policy" and forming a cross-functional team dedicated to this project. I also assumed, again because of this project's inclusion in the FY14 Organization Wide Priorities, that gathering and analyzing feedback from clients was something that everyone in the organization deemed valuable and worthy of time and effort. While I do still feel that gathering feedback is important to the organization and its staff at a variety of levels, there was limited understanding of the greater implications that data collection and analysis could potentially have, thus resulting in a focus on a very narrow approach to data collection and analysis.

In examining the assumptions I made, I think the greatest learning comes from reflecting on the origin of said assumptions and why they manifested themselves during my residency. I believe I made these assumptions for several reasons one of which is my history with the organization. Although I had not technically worked for or with Expeditionary Learning, I had experience with the organization and many of its staff members from my previous work as a teacher at an Expeditionary Learning school. This experience led me to create a vision of EL that included assumptions on how the organization would support the implementation of my project and its stance on collecting and analyzing data. From this experience, of having made assumptions and subsequently reflected on and analyzed those assumptions, I learn about the importance of maintaining an open-mind and a healthy sense of skepticism when entering an organization.

Implications for Site

The implementation of this strategic project and the achieved results, its subsequent analysis, and a deeper look at the change and growth Expeditionary Learning is currently facing affords the organization great opportunities for learning. In examining all of these things, three major implications for the site emerge when it comes to implementing organizational change: the existence of supporting and hindering conditions and how they are leveraged; examining priorities when implementing change initiatives; and understanding what it means to truly embody a data-driven approach within the organization's culture.

The first implication that I believe is important to examine is that of considering the existence of supporting and hindering conditions in an organization when attempting to implement change initiatives. As highlighted in this Capstone's RKA, leveraging the

supporting conditions and being aware of the hindering conditions can help ease the implementation of any change initiative, particularly those that have organization wide implications. In the case of this strategic project, the supportive condition of “connecting improvements to larger organization goals and vision” existed and helped support the implementation of aspects of this initiative. It manifested itself in the inclusion of ‘customer satisfaction feedback loops’ into the FY14 Organization Wide Priorities. This inclusion served to make explicit, at least amongst those who view, refer to, and use the document as a guide, the organization’s desire to gather data and feedback from its clients in a systematic manner and use it to strengthen programming. Explicitly naming the desire to be more data-oriented paved the way for more technical aspects of this initiative to occur, such as the creation and administration of the National Client Feedback Survey.

Unfortunately, the inclusion of ‘customer satisfaction feedback loops’ in the FY14 Organization Wide Priorities, given the sheer number of other initiatives and activities the organization was attempting to implement coupled with the changes and growth the organization was experiencing, was not enough to see changes beyond the creation of an additional feedback gathering tool occur. It seems that beyond this addition, very few of the other supporting conditions existed. This perhaps points to the difficulty in implementing more systemic organizational change. As EL moves forward in considering other change initiatives to undertake, it might consider how leveraging the supporting conditions will assist in the implementation of new initiatives. The existence of supporting conditions will likely also help in initiatives gaining organization-wide traction and allow for the initiatives to create system-wide change.

When looking at the list of hindering conditions outlined in Table 2 of this Capstone's RKA, it is clear to see that many of these existed during the implementation of the strategic project. The hindering condition, "Many changes and improvements introduced and implemented," had, by far, the greatest implications on this project and will likely continue to have implications for the implementation of any large initiative in the future.

As alluded to in previous sections of this Capstone, during the implementation of this strategic project, the organization was in the process of simultaneously implementing a myriad of other initiatives. The number of other initiatives being implemented and the large amount of priorities the organization chose to take on during FY14 lent itself to an isolation of this particular initiative, a lack of staff capacity devoted to this initiative, and a lack of priority given toward this initiative. While it was clear there was a desire to become more data-driven and to undertake such an improvement initiative, it was unclear how strong that desire was given the number of other priorities that existed and where this initiative ranked on the list of priorities.

As EL moves forward and undertakes the implementation of other new initiatives, an ability to maintain focus on fewer initiatives at any given time will likely lend itself to more deep-rooted change occurring. The implementation of this strategic project can serve as a case study for the future. As little large-scale organization change occurred during this project's implementation, it provides an example of how isolation of an initiative, lack of staff capacity, and relatively low priority affects the ability of the improvement initiative to have systemic change. Limiting the number of new initiatives

or improvements that the organization takes on will allow for more focused time and attention to those that do get implemented.

The final implication, and easily the most significant, that is of importance to note revolves around an organization's desire to become data-driven in its decision-making approach and the organization's capacity to truly embody this characteristic across the entire organizational culture. At the heart of this strategic project lay a desire on the part of Senior Leadership, as evidenced by informal conversations and information gathered during my entry into the organization, that EL adopt a more 'data-driven approach' with regard to its decision-making, program design, and overall organizational culture. As an organization with a fairly deep history of more organic approaches to small-scale growth and development finding itself in the midst of more large-scale growth and tremendous expansion, senior leaders saw a need to systematize and make more consistent processes around gathering, analyzing, and using data.

What exactly would it take for EL to embrace a more data-driven approach? In a blog post titled, "What it Means to be a Data-Driven Organization", Gretchen Van der Veer, Director of Leadership and Training at the Corporation for National and Community Service, (2011) says that being data-driven involves the, "Integration of regular systems of data collection into the business practices of your organization. What data you choose to collect and analyze will differ by organization depending on mission and operations. However, the bottom line is that employees are expected to collect, analyze, and learn from data on a regular basis." She goes on to state that this systematic collection and analysis of data will prove useful over time as, "It assures that you are making decisions based on evidence and not on instinct, assumptions, or perceptions,

which can be biased. You will be able to identify trends over time which can inform effective practices, help you become aware of issues, and illuminate possible innovations and solutions,” (Van der Veer, 2011).

Taking into account what Van der Veer states, this project actually offered a very narrow entry point toward becoming a data-driven organization as it focused on a specific type of data: feedback and satisfaction data from EL’s Whole School partners and clients. While there is evidence that similar practices regarding data collection and analysis exist across various pieces of the organization, a sense of cohesion regarding all of these scattered practices and a larger connection between all of these practices and all organizational work is still lacking. A sustained focus on becoming a data-driven organization will require a coherent strategy that aligns data collection and analysis across all segments of the organization; integrates data analysis and learning regularly into organizational activities and meetings; denotes staff capacity and time to the integration of data collection, analysis, and use; and ensures data collection and analysis is on-going and embedded in practice.

As I was the only EL employee working on client feedback and data collection, it is imperative that the organization invests in capacity building, through forming a dedicated data team and providing time and resources for this work. This will be a critical step should the organization desire to continue this initiative; should it seek to connect it to the various other data collection mechanisms already in place; and should it hope to create a more coherent, unified, system-wide data collection, analysis, and use approach. A dedicated team could support capacity building across the organization,

ensure that data collection is unified and cohesive, and maintain a focus on using data in strategic and meaningful ways across the entire organization.

Implications for Sector

As a growing organization, an emerging leader in Common Core aligned curriculum development, and a burgeoning force in novel and innovative approaches to education, the sector is poised to learn a great deal from Expeditionary Learning. The implementation of this specific strategic project can serve as a case study for other organizations in the education sector experiencing comparable change and growth as EL. Other organizations can likely learn how EL has navigated the terrain of growth and change and the implementation of several improvement initiatives. As an organization that seeks to solidify and expand its brand and increase the size of its market share in the education sector, EL also has a great deal to share with respect to this aspect of its growth and change. Additionally, the implementation of this strategic project can serve as a case study for organizations wishing to adopt a more cohesive ‘data-driven’ approach to decision making. Finally, as indicated in the “Implications for Self” section, the implementation of this strategic project can serve as an example to other leaders in the education sector on the brink of entering organizations with which they have a sense of familiarity and/or history.

As a growing, changing, and maturing organization, the way in which Expeditionary Learning has handled this period of growth and change can provide similar organizations with lessons learned, particularly as they attempt to implement improvement or large scale organizational change. Specifically, from the implementation of this strategic project, EL and organizations similar to it can learn many of the same

lessons. Of particular importance is the idea of understanding how critical it is to examine priorities and determine focus areas when implementing large-scale organizational change. Using the implementation of this strategic project as a case study, organizations similar to EL can learn that the number of other initiatives being implemented and the large amount of priorities an organization chooses to take on during a given period of time will likely lend itself to an isolation of initiatives, limited staff capacity to devote to initiatives, and a lack of cohesion amongst all initiatives being undertaken.

As organizations similar to EL move forward and undertake the implementation of new initiatives, specifically those that set out to affect large-scale organizational change, an ability to maintain focus on fewer initiatives at any given time will likely lend itself to more deep-rooted change occurring. The implementation of this strategic project can serve as a case study for the future. As little large-scale organization change occurred during this project's implementation, it provides an example of how isolation of an initiative, lack of staff capacity, and relatively low priority affects the ability of the improvement initiative to have systemic change. Limiting the number of new initiatives or improvements that the organization takes on will allow for more focused time and attention to those that do get implemented.

A second important implication that the education sector at large, and organizations similar to EL specifically, can take from this project is what it means to truly embrace an organization wide data-driven culture. In their quest to become more data-driven, the development of coherent systems of data collection, analysis, and use within growing and changing mission-driven organizations will be critical. This strategic

project highlights that it will require more than just an espoused desire on the part of senior leadership for organizations to build the capacity and the coherent systems to gather, analyze, use, and respond to meaningful, relevant, and appropriate data across multiple facets and aspects of organizations. The specifics of the data collection, including what data is collected, how it is collected, the frequency with which it is collected, and who is involved in its collection and analysis will vary depending on the organization and its goals and mission and vision. In order to create the conditions for this to take place, it will be important for organizations to commit to, in both espoused and enacted values, continuous learning and growing.

Finally, the implementation of this strategic project can serve other developing leaders in the education sector as they prepare to enter organizations and attempt to affect large-scale organizational change. As previously outlined in the “Implications for Self” section of this capstone, this project illuminated my tendency to make assumptions when entering an organization and my aversion to certain types of risk-taking. In the end, it was clear that my assumption making and risk aversion likely had detrimental effects on the depth and breadth of impact that this project had. Hindsight is 20/20, but I believe that future education sector leaders can learn how assumption making and risk aversion can hinder the implementation of large-scale organizational change. Furthermore, while it might be difficult to prevent assumption making, future education sector leaders can learn the importance of continuously questioning assumptions and maintaining a healthy sense of skepticism when entering a new organization.

Conclusion

In 2011, Expeditionary Learning set itself on an ambitious course with the launch of its 4-year Strategic Plan. By following the plan, the organization seeks to: 1) create a sustainable budget built on diversified revenue; 2) have a consistently high performing network of schools across urban, rural, and suburban students; 3) foster new and enduring brand value through the development of intellectual property; 4) achieve higher brand visibility through signature events and deeper research; and 5) develop strategic partnerships in order to augment the organization's capacity and visibility (Internal Document: Stepping Up, A Four Year Strategic Budget Plan, 2011). My 10-month residency at Expeditionary Learning provided the opportunity to lead a strategic project of significance not only for my learning, but for the learning of the organization on its path toward achieving the goals laid out in the 4-year strategic plan and realizing its mission. The project, designed to create a system to collect, analyze, and use client feedback and satisfaction data provided an entry point, albeit a narrow one, into establishing a coherent, organization-wide system of data collection and analysis.

In this capstone, I provided contextual information about Expeditionary Learning and situated my strategic project within that context; I examined the knowledge base on improvement processes, organizational change, and customer satisfaction; I described my role in developing and implementing an improvement process related to customer feedback and satisfaction data collection, analysis, and use; and I discussed and analyzed the results of the implementation of the project. In this conclusion, I will revisit Expeditionary Learning's context and its need for the implementation of my strategic

project. Finally, I will examine what the establishment of a data-driven approach could mean for Expeditionary Learning, its clients, and the education sector, at large.

Expeditionary Learning is in the midst of tremendous growth and change and has seized opportunities to pursue and refine mission-aligned business. With this growth, comes a need to systematize aspects of the organization, including the collection, analysis, and use of data. As the majority of EL's work is client facing, gathering data from these clients with regards to their experiences with EL is crucial to ensuring needs of clients are met and ultimate outcomes of impacting teacher practice and student achievement are reached. However, as EL continues to grow and expand, data collection, analysis and use should become integrated into all aspects of the organization and not just relegated to those aspects that are client facing. Furthermore, it will be important that once data collection is integrated into all aspects of the organization, cohesion across multiple data collection and analysis mechanisms is achieved and maintained.

A clear understanding of how to develop coherent systems of data collection, analysis, and use within growing and changing mission-driven organizations could hold major implications for non-profits within the education sector. What data is collected, how that data is collected, and who is involved in the collection and analysis will vary depending on the organization and its goals and mission and vision. What should remain constant is the desire and commitment to collect information and evidence in order to inform decision-making, celebrate successes, and support changes and improvements. It will be important for organizations to create the conditions for this to take place, by committing to, in both espoused and enacted values, continuously learning and growing.

EL seeks to change and improve the way in which it engages with data. In the case of this strategic project, this specifically meant data and feedback coming from clients regarding their satisfaction and experience with EL's products and services. However, the implementation of this strategic project illuminated that EL has the potential to adopt such a learning and growth stance toward its entire system of data collection, making room for a coherent, systematic approach to data collection and analysis that transcends any single aspect of the organization.

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EXPEDITIONARY LEARNING

Appendix A: Expeditionary Learning Historical Timeline



1987–1991

In **1987** the Harvard Outward Bound Project was established at the Harvard Graduate School of Education. This project sought to increase the profile of experiential education at Harvard's school of education while also bringing increased academic rigor to Outward Bound's work in schools.

In the early **1990s** Outward Bound drew on many years of urban and school-based programming and the work of the New York City Outward Bound Center and the Harvard Outward Bound Project to begin an Education and Urban Initiative. This initiative sought to identify, develop, and replicate effective models of school-based urban programming. It informed what would eventually become the Expeditionary Learning model.

In **1991** the New American Schools Development Corporation issued a call for proposals for comprehensive “break the mold” school reforms to improve achievement in the country's lowest-performing schools. In response, Outward Bound organized a design team made up of members of the Harvard Outward Bound Project, Harvard University professors, and organizations such as Project Adventure, Facing History and Ourselves, and the Technical Education Research Center (TERC), to write the proposal for Expeditionary Learning.

1992–1995

In **1992** the New American Schools Development Corporation awarded \$9 million in grant funding to Expeditionary Learning, selecting its model from among 800 applicants.

By **1993** ten demonstration schools in five cities — New York, Boston, Denver, Portland, and Dubuque -- signed on to partner with Expeditionary Learning.

In **1995** the Academy for Educational Development (AED) found marked improvement on standardized tests in nine of Expeditionary Learning's ten demonstration schools. AED also found that teaching through learning expeditions resulted in high-quality work that met district and professional standards, improved student engagement and motivation, and increased parent participation.

1996–2000

By **1995–1996** Expeditionary Learning, with the support of New American Schools, moved from an entirely philanthropic support model to one supported largely by fee-for-service.

In **1998** The Odyssey School became the first charter school to write Expeditionary Learning into their charter application.

A **1999** partnership with the Public Education and Business Coalition in Denver helped Expeditionary Learning restructure and improve its approach to literacy instruction, a cornerstone of its professional development for teachers.

Research by the National Staff Development Council in **1999** concluded that Expeditionary Learning was the only program of twenty-six studied to meet all of their standards for quality professional development. They also concluded that Expeditionary Learning students' math and reading scores had increased significantly.

Beverly Chin, professor of English at the University of Montana and past president of the National Council of Teachers of English, worked with Expeditionary Learning in **2000** to improve professional development in writing.

1999: 109 teachers attended Expeditionary Learning institutes, and 304 participants attended the National Conference

2000: 96 schools in 28 states, Washington DC, and Puerto Rico

2001–2005

In **2001** the American Youth Policy Forum gave Expeditionary Learning a five-star rating for linking community service to academics.

The **2002** National Staff Development Council report *What Works in the High School: Results Based Staff Development* noted the efficacy of Expeditionary Learning's professional development with its "heavy emphasis on teacher content development and the rigorous expectation of adult learning and collaboration for all teachers."

In **2003** Expeditionary Learning began intensive professional development on student-engaged assessment, based upon the research of Rick Stiggins. Teachers in Expeditionary Learning schools gained significant expertise in formative and summative assessments as tools to engage students and increase achievement.

The Bill & Melinda Gates Foundation granted Expeditionary Learning \$12.6 million in **2003** to help create 14 small public secondary schools throughout the United States.

In **2004** Fund for Teachers selected Expeditionary Learning as a partner to provide competitive fellowships to teachers to improve their teaching practice.

Beginning in **2005**, local foundations in Kansas City, Boston, California, and Washington granted Expeditionary Learning over \$2 million for regional expansion.

2006–2010

In **2007** The Bill & Melinda Gates Foundation granted an additional \$11.1 million for the creation of nine more small high schools.

2008: 1,388 teachers attended Expeditionary Learning institutes, and 687 attended the National Conference.

In **2009** President Barack Obama visited Capital City Public Charter School, an Expeditionary Learning school in Washington, DC, and cited it as an “example of how all our schools should be.”

In **2010** Expeditionary Learning expanded its model to include Turnaround Schools, a major focus of federal education policy.

By **2010** Fund for Teachers had awarded 328 Expeditionary Learning teachers over \$1 million in fellowships.

Ten of Expeditionary Learning’s 47 high schools boasted 100% college acceptance in **2010**.

2010-2013

2010 - EL is invited to join a national Community of Practice, sponsored by the Hewlett Foundation, to promote Deeper Learning. EL is one of ten organizations in this ongoing group that includes High Tech High, New Tech Network, Envision Learning and others. Deeper Learning is defined as: Mastery of Core Academic Content; Critical Thinking; Communication; Collaboration; Self-direction; and Academic Mindsets.

2010 - EL Returns to its roots at Harvard Graduate School of Education, hosting a symposium on its expanded definition of student achievement that includes scholastic success, positive character and quality work. It is attended by leaders in policy, research, education and schools, and launches a new era for EL of reaching out for national impact.

2010- EL launches the Mentor School program which pulls together a cohort of highly performing, highly implementing schools to serve as mentors and models to other schools in the network.

2011 - EL Core Practices Book revised to reflect 10 years of our learning; the book doubled in length.

2011 - Center for Student Work is launched online as the world's largest collection of quality student project work, an open resource for educators.

2012 - Awarded a New York State contract to create Common Core ELA curriculum and state-wide professional development for grades 3-5 and 6-8.

2012 - EL Launches graduate degree program in partnership with Mt. Holyoke College.

2012 - All mentor schools achieved 100% college acceptance.

2013 - For the 5th consecutive year, the EL National Conference features inspirational EL students as keynote speakers. The conference is attended by 850 educators.
(**REVISED** 1000! educators)

Appendix B: Expeditionary Learning 4-Year Strategic Pillars



EXPEDITIONARY LEARNING

Our Mission: is to transform teaching. We strive to create classrooms where students achieve more than they think is possible and contribute to building stronger communities and a better world.

Our 4-year strategic plan pillars:

Pillar 1

Build a network of schools that are consistently excellent in quality and results: 80% of schools are implementing the EL model and out-performing peers by the end of their 4th year of work with Expeditionary Learning

Pillar 2

Elevate EL to national leadership in meeting the challenge of the Common Core State Standards

Pillar 3

Build EL's intellectual property to strengthen implementation of our whole school model, support new revenue opportunities, and build our brand.

Pillar 4

Solidify EL's body of research evidence and amplify our public relations outreach

Pillar 5

Diversify and grow both earned fee and philanthropic revenues streams

Appendix C: Expeditionary Learning Mission Statement Process: Framing Questions for Discussion and Feedback

1. **What is the goal** – the result – that we are trying to achieve for each of the following groups:

- a. Schools?
- b. Teachers?
- c. Students?

RESPONSE:

Please complete the following sentences: As a result of our work...

- Schools will...
- Teachers will...
- Students will...

2. **What is the purpose** – the overarching result -- that ties all of these results together? Or is one of these results – for schools, teachers or students – above the others? In what ways does our expanding vision of our work challenge or reinforce what we think of as our purpose?

- a. Do we want to characterize “for whom”? In other words, any school or communities “where great schools are needed most”? “Students from all backgrounds” or especially focused on students facing particular situations?

RESPONSE:

Please write one or two compelling sentence(s) that describe(s):

- The ultimate result of our work – what we ultimately want to accomplish, and for whom.
- How we accomplish this result – core businesses.

3. Please review the **values statements** that emerged from the mission discussion (see second page of “Mission Ideas Reorganized”), the EL Design Principles, and the draft diversity statement.

- a. What is unique or different about our approach that may reflect our guiding principles? Are there values or ideas you would add/change?
- b. How well do the EL design principles work when applied to our professional development business? Are there any other principles that are emerging as we design our professional development work with teachers?
- c. What is most important for others to know about who we are and what we stand for? What are the top 5 – 6?

RESPONSE:

- What are the top five beliefs or guiding principles that shape all of our work at EL?

4. **REFLECTIONS:**

What did you grapple with as you completed this assignment? What ideas were hard to capture? What became clearer? What did you have to discard to come up with these sentences and values?

Appendix D: Expeditionary Learning Historic Vision/Mission Statements

1. Expeditionary Learning Schools is the education transformation organization that makes clear: you don't need to choose between high-test scores and turning kids onto learning and active citizenship.
2. Expeditionary Learning Schools is the largest school improvement organization of its kind. Located primarily in urban and rural areas where school improvement is most needed, ELS schools promote high academic achievement through real world projects and products within an active, engaging, and rigorous college preparatory curriculum.
3. The mission of EL is to help create good and excellent elementary, middle, and high schools that bring out the best in students, teachers and administrators; to sustain these schools in a network, or system, of schools that are pursuing continuous improvement; and to use their examples of excellence to influence the nature and practices of schools in their regions and around the country.
4. Expeditionary Learning Schools' mission is to create excellent schools where the teaching is active, the culture is nurturing, and the expectations are high for everyone. It's what we believe school ought to be.
5. Expeditionary Learning: Rigorous, Engaging, Transformative
 - a. We partner to open new schools and existing schools across the country
 - i. In urban, suburban, and rural communities
 - ii. At elementary, middle, and high school levels
 - iii. With high academic achievement and college preparation for all students
 - b. We support and energize teachers to grow professionally as learners and leaders
 - c. We take the lead in building students for the future: critical thinkers, active and ethical citizens, environmental stewards

Appendix E: September Strategic Project Memorandum of Understanding

Vaishali Dharmadhikari
Strategic Project MOU
September 23, 2103

Project Description

Expeditionary Learning is experiencing a period of tremendous growth and change marked by new opportunities to pursue and refine mission-aligned business. With this growth, comes a need to systematize and organize many aspects of the organization, including structures and processes for collecting, analyzing, and responding to data regarding client experiences and client satisfaction. During my residency with Expeditionary Learning, I will undertake a project designed to create and implement a robust system of collecting, analyzing, and responding to customer experience and satisfaction data.

This project falls directly in line with stated priorities from the organization's 4-year Strategic Plan. In particular, this project will serve two of the five pillars of EL's Strategic Plan:

- Pillar 1: Build a network of schools that are consistently excellent in quality and results: 80% of schools are implementing the EL model and outperforming their peers by the end of their 4th year of work with Expeditionary Learning
- Pillar 4: Solidify EL's body of research evidence and amplify our public relations approach

Moreover, the project serves to meet more specific goals of several of EL's Senior Support Team, including:

- Defining measures of customer satisfaction and consistently tracking against those
- Ensuring that delivery of PD meets client needs with quality and integrity
- Refining external customer satisfaction gauge to ensure feedback loop on PD delivery
- Developing an "internal customer satisfaction" gauge to ensure that feedback is flowing from program developers to field

To meet these goals and implement the project with which I have been tasked, I crafted the following guiding research question to provide direction and focus for my work: How can EL become a more data-driven organization in order to ensure uniformly high quality client experiences and, ultimately, client satisfaction? Specifically, this project entails determining, designing, and implementing the best systems, structures, and processes for effectively and efficiently gathering, analyzing, and making informed decisions from customer experience and satisfaction data.

Given this, I will oversee the implementation of a pilot client feedback system designed to do the aforementioned activities, using the frame of a continuous improvement process and the following strategic goals to guide the work:

- Gather customer experience and satisfaction data, specifically focusing on the work of school coaches
- Use, analyze, and disseminate the data in a meaningful, improvement focused way

- Engage in collaborative work around examining, disseminating, and acting on data

Specifically, the following tasks have been outlined as integral to implementation and success of the project:

- Determine (and/or craft) a shared definition of ‘high quality client experiences’
- Determine (and/or craft) intended outcomes for the variety of services EL offers its clients
- Create a tool that measures client satisfaction against those outcomes and gathers data regarding client experience
- Gather data from a small sampling of a cross section of EL’s clients (Mentor Schools, Whole Schools, Districts/Schools implementing CCSS ELA modules)
- Facilitate analysis of data
- Facilitate action planning based on data

The project, as outlined, is set to begin and end with my work, with the ultimate goal of providing the organization with an infrastructure for continued and expanded use of the client feedback system and recommended action steps for that. Additionally, as the process of implementation is sure to reveal great learning, I anticipate gathering data and information regarding modifications that might be necessary for successful continued or expanded use.

Resident’s Role

This project presents an abundance of learning opportunities for me, both in content and process. With regards to content, I had envisioned my residency being a time for operating at my learning edge, and this project offers that distinct opportunity, as I do not have a background in areas related to program evaluation or customer satisfaction. With regards to process, this project will entail engaging with a diverse, cross-functional team, which will pose communication and collaboration challenges, and attempts to implement an initiative designed to provide systemic (within the organization) change, from which I intend to harvest a great deal of learning.

To successfully implement this project, I will work closely with EL’s Research Department consisting of the Director of Research, Mindy Spencer, and the Research Data Analyst, Katherine Paik. Additionally, as my project involves gathering data from schools within EL’s network, I will anticipate working with the Chief Schools Officer, Mark Conrad, and his team, particularly the Regional Director of the Northeast Region, Lily Newman, and School Designers located in this region. Finally, as my work deals with client satisfaction and meeting client needs, I will work closely with those staff members who interact with clients in the marketing realm, including my direct supervisor, Stephanie Lawkins, Chief Strategy Officer, and Ananda Grant, Director of Market Development.

Appendix F: Expeditionary Learning FY14 Organization Wide Goals



EXPEDITIONARY LEARNING

FY14 Organization-wide Goals October 2013

Our Mission

To create classrooms where teachers can fulfill their highest aspirations, and students achieve more than they think possible, becoming active contributors to building a better world.

Our Vision

When students and teachers are engaged in work that is challenging, adventurous and meaningful, learning and achievement flourish.

FY14 is the third year of our 4-year strategic plan. Our goals for the coming year in support of our mission, vision, and strategic plan are as follows:

4 Year Strategic Plan	FY14 Organization-wide Goals	Evidence
Pillar 1: Build a network of schools that are consistently excellent in quality and results: 80% of schools are implementing the EL model and outperforming peers by the end of their 4 th year of work with EL	1. Pilot credentialing system for whole schools, and integrate it with EL's fully implemented partnership readiness process, work plans, and regional portfolio reviews.	• Annual feedback cycle from partner schools. • Number of schools meeting credentialing criteria.
	2. Phase out school partnerships that have poor partnership conditions and no improvement rates, and bring on high potential school partnerships with a clear focus on high needs urban and rural communities.	• Regional portfolio reviews. • Demographic profile of students and schools with whom we work.
	3. Accelerate EL's progress made in implementation of Common Core shifts and standards alignment across the whole-school network.	• Performance of EL network schools on common core aligned assessments.
Pillar 2: Elevate EL to	4. Design and launch new capacities on our website and other	• Progress on the analytic metrics

national leadership in meeting the challenge of the Common Core State Standards	digital tools to engage teachers with our curriculum, toolkits, videos, and student work, and pilot on-line learning opportunities.	built into the website (specific metrics available on request).
	5. Establish EL as leaders in building teacher capacity for Deeper Learning through the Common Core through bringing our exemplary professional services and teacher supports to regional scale in the Northeast and Mid-Atlantic and piloting offerings in additional regions.	• Adoption rates of our literacy curriculum as measured by book sales (our clearest window into adoption rate).
Pillar 3: Build EL’s intellectual property to strengthen implementation of our whole school model, support new revenue opportunities, and build our brand	6. Create sustainable workflow for content development (on-line/print versions of curriculum, books, videos) that results in reliable completion dates and positions EL for new business opportunities.	• Complete remaining curriculum modules on schedule agreed upon with New York State. • Feedback from staff involved in publications work on the annual staff survey.
	7. Establish EL as an innovative voice in educational publications through the release and marketing of <i>Leaders of Their Own Learning: Transforming Schools through Student Engaged Assessment</i> ; and complete the content and videos for our second book.	• Volume of book sales and increase in the number of speaking requests and related writing in magazines, newspapers, and blogs.
Pillar 4: Solidify EL’s body of research evidence and amplify our public relations outreach	8. Elevate consistency and quality in delivered programs through: a. Customer satisfaction feedback loops; b. Data-dashboards to track key student and school outcomes; c. Improved inter-rater reliability on our Implementation Review; d. New third-party study focused on the impact of our literacy curriculum and associated professional services.	• Results from at least one research study on impact from our literacy curriculum and related coaching services. • IR results consistent across regions. • Published third party research results.
	9. Build stronger public awareness of EL’s work and brand by generating press coverage, speaking engagements, and social	• Clear metrics for tracking public awareness of our work and brand

	media activities through: a. The release of the Mathematica report; b. The publication of our book, Leaders of Their Own Learning: Transforming Schools through Student Engaged Assessment; c. Adoption rates of our literacy curriculum.	are still being worked on with the help of several of our funders.
Pillar 5: Diversify and grow both earned fee and philanthropic revenues streams	10. Grow EL’s professional services work focused on institutes and coaching cycles keyed to our curriculum and book resources, stable agendas and high quality materials, and delivered by a large base of skilled EL staff.	• Meet or exceed revenue target of \$2.1M.
	11. Establish new sustainable revenue through the sale of instructional materials and publications.	• Meet or exceed revenue target of \$400K.
	12. Deepen EL’s relationships with a broader set of foundations and build our base of relationships to realize greater philanthropic support from individuals.	• Meet or exceed revenue target of \$3.3M from foundation giving.
Organizational Effectiveness	13. Build a strong and dynamic EL culture.	• Time allocated to the work at EL events.
		• Results on annual staff survey.
	14. Improve EL’s strategic planning process and goal setting across the organization.	• Individual goals developed by all Directors and SST members aligned to FY14 annual organization-wide goals.
	15. Create new structures and habits to improve internal communication and information flow across the organization.	• Presence of new tools for internal communication developed and integrated across the organization. • Results on annual staff survey.
	16. Launch new organizational effectiveness tools and resources across the organization to enhance employee engagement and professional development.	• Results on annual staff survey.
Finance	17. Implement a distributed budget process to empower	• Revenues that meet or exceed

	decision-making, seek efficiencies, and increase financial acumen and oversight.	annual costs.
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Appendix G: Entry Plan

Vaishali Dharmadhikari
Draft Entry Plan
April 30, 2013

Introduction

Entering Expeditionary Learning schools for my 10-month residency, I understand that I have a unique opportunity as someone who is currently an outsider to the organization, but has previous experience with and a baseline understanding of the work of Expeditionary Learning. Regardless of my previous experience and understanding, however, I believe that, in order to create lasting impact and provide a value-add to the organization, and ultimately the students, teachers, and schools Expeditionary Learning serves, I must first develop a keen awareness of the organization's staff and culture, the current and anticipated challenges, and the vision for the organization's future.

Purpose of Entry:

1. To get to know all the people involved in the running of the organization both personally and professionally
2. To allow all those involved in the organization to get to know me, both personally and professionally
3. To learn the history and culture/norms of the organization
4. To understand current issues/challenges the organization faces

Key Entry Plan Activities and Timeline:

Time-Frame	Activity	Description	Purpose	Key Groups or Parties Involved
Pre-Entry	Memo (*see below for memo already sent)	• Memo to Stephanie Lawkins and Scott Hartl	• Outline understanding of position in scope of work • Articulate key involvement in proposed project (strategic planning in business line) • Articulate outstanding questions	• Senior leadership • Potential team members

Pre-Entry- July	Phone Calls and Site Visits	• Visiting sites where PD is taking place • Phone calls with potential team members	• Connect with potential team members • Understand scope/sequence of potential work • Position myself within the scope/sequence of potential work	• Senior Leadership at EL • Proposed team members
Pre-Entry - August	Reading and Research	• Read Core Practices book • Read any minutes from board meetings • Review existing strategic plan	• Develop deeper understanding of model that is implemented in EL schools and the pedagogy and instructional practices that EL promotes	• Organization staff • Organization's board • Schools part of the EL Network
July -August	Interviews	• Formally interview key organization leaders	• Gather data around organizational culture, current challenges, current scope of work • Develop relationships with senior leadership • Get to know senior leadership and allow senior leadership to get to know me	• Senior Staff
July – December (perhaps beyond)	Observations	• Observe in-network professional development offered to EL schools • Sit in on board meetings • Ask to sit in on senior leadership meetings (if not already doing so)	• Develop deeper understanding of model that is implemented in EL schools and the pedagogy and instructional practices that EL promotes • Understand how the organization's board operates • Develop relationships • Get a better sense of the working of the organization as a whole (how board connects to work, how senior leadership connects to work)	• Schools part of the EL Network • Organization staff • Organization's board

July - December	Informal Conversations	• Conversations during lunch, in passing, etc.	• Get to know staff • Develop relationships • Understand the work of others in the organization and how it connects (or could potentially connect) to my work	• Organization staff
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***Memo Sent to Expeditionary Learning on 3/11/2013**

Initial step in entry, outlining role, potential involvement in proposed project, and articulating outstanding questions

To: Scott Hartl, CEO - Expeditionary Learning
Stephanie Lawkins, CFO – Expeditionary Learning
From: Vaishali Dharmadhikari, Harvard Graduate School of Education
Re: Residency at Expeditionary Learning
Date: March 11, 2013

Description of Work/Projects

Expeditionary Learning (EL) is engaged in a period of growth and expansion through its development of innovative professional development services and curricular materials related to the classroom, school, and district-wide implementation of the Common Core State Standards. As the organization embarks on this entrepreneurial work in an extremely fluid landscape it will be important to continually assess and navigate the effects these external facing projects have on the organization, its culture and its staff. In particular, consistently examining the key question of how an organization maintains integrity to core practices, mission, and vision while scaling its products and offerings to a wider, broader audience will be critical.

My Role as it Relates to Work/Projects

As a doctoral resident at Expeditionary Learning, with several years of direct teaching experience in an EL school, I am uniquely positioned to help lead this new line of work. Specifically, my involvement might be characterized by, but not limited to, the following:

- Engaging in strategic planning related to the development of new services and products
- Ensuring cohesion of new products and services with the mission and vision of Expeditionary Learning
- Maintaining an alignment and connection to core practices of EL within the new offerings

- Sustaining the same high levels of rigor and engagement that are the hallmark of EL schools and EL professional institutes within the new offerings
- Understanding and best addressing the needs of a wider audience, particularly those who may not be well versed in the core practices of EL
- Gauging needs of EL staff broadly as they relate to the new line of work and serving as a conduit of information between EL staff and the team(s) managing the new line of work

Logistics and Outstanding Questions

I will be based out of the Boston/Cambridge area and anticipate frequent travel to EL offices in Amherst, MA; New York, NY; and sites where professional development services are being offered. There are several questions related to logistics and mentorship that have yet to be resolved including:

- Who will I be reporting to directly?
- In what ways will I be able to interface with organization leaders (CEO, CFO, CPO, etc.) and the organization's board?
- Who might I identify as a potential 'leadership mentor'?
- Is there an anticipated schedule of travel (even if somewhat general/broad)?
- While my official start date is July 1, 2013 (in accordance with Ed.L.D. program guidelines) what are the opportunities, if any, to begin involvement in the organization's current scope of work?

As we move forward in shaping the nature of this residency in collaboration, determining the answers to these questions will be helpful in defining not only the logistics of the position and projects so that I may best serve the organization, but also in identifying opportunities for my own personal learning and growth as it pertains to leadership development and organizational management.

Appendix H: National Client Feedback Survey Questions
Target Audience: School Leaders (and other leadership team members)

DEMOGRAPHIC INFORMATION:

1. Drop down menu to select school
2. What is your role at your school:
 - Principal
 - Assistant/Vice Principal
 - Executive Director
 - Other Administrator

OVERALL SATISFACTION:

1. Overall, how satisfied are you with your partnership/affiliation with EL this year?
 - Extremely satisfied
 - Satisfied
 - Somewhat satisfied
 - Unsatisfied
 - Extremely unsatisfied
2. Overall, how satisfied are you with the quality of School Designer support you are receiving this year?
 - Extremely satisfied
 - Satisfied
 - Somewhat satisfied
 - Unsatisfied
 - Extremely unsatisfied
3. Overall, how well supported do you feel by EL staff in meeting your work plan goals this year?
 - Highly supported
 - Supported
 - Somewhat supported
 - Unsupported
 - Highly unsupported
4. Overall, how well supported do you feel by EL staff in achieving a high level of implementation of EL practices this year?
 - Highly supported
 - Supported
 - Somewhat supported
 - Unsupported
 - Highly unsupported
5. In the space below, please provide any narrative feedback that might further explain your answers to the previous four questions:

FEEDBACK ON SCHOOL DESIGNER SUPPORT

In the actual survey, this page will reload each time the respondent answers “yes” to question #7 “Do you work with another School Designer?” so that we can gather feedback on each school designer separately.

Please select a School Designer from the drop down list for which you will direct this specific set of feedback

- Drop down list of SDs
- Other (space for written name)

Supporting Implementation of EL Model:

School Designers play many roles to foster EL implementation and build capacity and ownership of EL implementation within the school. Based on what you've observed this year, how would you rate your School Designer's ability to:

	Beginning	Developing	Accomplished	Exemplary	Not Applicable
Understand and explain the Expeditionary Learning model.					
Support the leadership team					
Coach school leaders					
Plan and deliver engaging, purposeful, and relevant professional development					
Use data effectively in the planning and delivery of coaching and professional development					
Co-plan with teachers and teams					

Use direct service days strategically and effectively					
Advocate for and help staff reflect on attendance at regional/national institutes					
Generate enthusiasm for the implementation of EL					

Focusing on Student Achievement

At EL we believe that rigorous academics fuel purposeful learning beyond the classroom and that student achievement not only includes traditional measures but also the creation of high-quality “real” work and measures of engagement and motivation. Based on what you've observed, how would you rate your School Designer's ability to:

	Beginning	Developing	Accomplished	Exemplary	Not Applicable
Impact traditional measures of academic achievement					
Support the implementation of structures that foster motivation, engagement, and character					
Support the creation of high-quality work and products					

Builds Relationships to Support the Work

It is important for School Designers to build relationships in order to support their work. Based on what you've observed how would you rate your School Designer's ability to:

	Beginning	Developing	Accomplished	Exemplary	Not
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					Applicable
Seek to understand cultural differences and actively attend to issues of diversity					
Use professional, clear, and action-oriented language in written and verbal communication					
Respond to communication from teachers, school leaders, etc., in a professional, effective and timely manner					
Manage and address conflict openly and productively					

Demonstrates Character, Work Ethic, and Cultural Competencies

Based on your observations this year, how would you rate your School Designer's ability to:

	Beginning	Developing	Accomplished	Exemplary	Not Applicable
Devise and carry out plans in a strategic manner					
Manage time, work, and resources					
Work collaboratively with a variety of colleagues and					

show a commitment to being a team player					
Represent EL positively					

Please provide any narrative feedback that would further explain your answers to the previous questions:

Do you work with another school designer?

- yes
- no

FEEDBACK ON NATIONAL ORGANIZATION

Based on your experience with **EL as a national organization** this year, please rate your level of agreement with the following statements regarding your partnership and affiliation:

<i>Partnership and Affiliation</i>	Strongly Agree	Agree	Somewhat Agree	Somewhat Disagree	Disagree	Strongly Disagree
Our partnership and affiliation with EL adds value to our school.						
Our partnership and affiliation with EL is seen positively by our school community.						
Our partnership and affiliation with EL positively impacts student achievement.						
Our partnership and affiliation with EL positively impacts school culture.						
Off site Professional Development Institutes, Site						

Seminars, and National Conferences support our school in meeting work plan goals and achieving high levels of implementation.						
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Based on your experience with **EL as a national organization** this year, please rate your level of agreement with the following statements regarding communication and the network:

<i>Communication and Network</i>	Strongly Agree	Agree	Somewhat Agree	Somewhat Disagree	Disagree	Strongly Disagree
Regional director is supportive of our school and responsive to any concerns.						
I am well-informed about what is happening with EL as an organization.						
I have regular opportunities to connect with other EL schools and their leaders.						
EL and its staff helps facilitate and promote connections between EL schools and EL school leaders.						

Based on your experience with **EL as a national organization** this year, please rate your level of agreement with the following statements regarding materials and resources:

<i>Materials and Resources</i>	Strongly Agree	Agree	Somewhat Agree	Somewhat Disagree	Disagree	Strongly Disagree
---------------------------------------	----------------	-------	----------------	-------------------	----------	-------------------

The materials and resources I receive are helpful and support the work at my school.						
I have access to the appropriate materials and resources (either through School Designers or EL Commons).						

Please use the space provided below to provide any additional comments or insights:

Appendix I: Letter to EL School Leaders regarding National Survey

Dear EL Leaders,

Expeditionary Learning partners with schools based on a shared goal of increasing student achievement through the deep implementation of EL Core Practices. As a valued partner in this work, it is important that we hear from you regarding the services and support we offer in order to gain a better understanding of what is going well and what areas require growth or improvement.

Toward that end, we would greatly appreciate your participation in our National Client Feedback Survey. You can access the survey through the following open access link: https://donahueinstitute.co1.qualtrics.com/SE/?SID=SV_6nwxAz7G2moTUnH. Please share this link with other administrators and leaders at your school.

This survey asks for specific feedback about the School Designer(s) assigned to your school and is aligned with the competencies that we have identified as critical to this position. Please understand that while this survey is not intended to be a comprehensive evaluation of your School Designer's effectiveness, we will use the information you provide to improve School Designer services to your school individually and all EL schools collectively.

This survey should require no more than 15-20 minutes of your time, and we are asking that you please complete the survey by **Wednesday, February 5, 2014**. If you have any questions or concerns about the survey or this process, please feel free to contact Vaishali Dharmadhikari at vdharmadhikari@elschools.org or your Regional Director.

You can access this link using any computer, but data from any one responder must be completed before another survey can be started on the same computer. If you are using this open access link on your personal computer, you may return to a partially completed survey on the same computer, but you must complete it before you begin another. Multiple participants may enter data for a school from the same computer, but one participant must complete the survey (hit SUBMIT) before another person can access the link from the same computer.

We appreciate your thoughtful responses as we work to continuously grow and improve!

With gratitude,
Mark

Mark Conrad
Chief Schools Officer
Expeditionary Learning
[413-253-7707](tel:413-253-7707) x 115 (office)
[443-519-8554](tel:443-519-8554) (mobile)

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Thinking in a New Direction

Appendix J: Email to Regional Directors regarding National Survey

National Survey for Client Feedback

Vaishali Dharmadhikari <vdharmadhikari@elschools.org>

Thu, Jan 9, 2014
at 10:00 AM

To: Regional Directors <RegionalDirectors@elschools.org>

Cc: Mark Conrad <mconrad@elschools.org>, Tom Van Winkle
<tvanwinkle@elschools.org>, Mindy Spencer <mspencer@elschools.org>

Hello Regional Directors!

Happy New Year! I hope this email finds you enjoying the start of 2014.

I'm writing to inform you of the process and plan regarding the implementation of a national survey to solicit client feedback on EL's products and services and to ask for your feedback on a few items related to this process.

After much discussion with a variety of folks, it's been decided that the best way to gather feedback from clients with regards to satisfaction is through a national survey, separate from any mid-year review structures. The plan is to administer that survey, through Qualtrics, to all school leaders and administrators on Jan. 27.

The draft survey questions can be found on this [Google Doc](#) and I would greatly appreciate any feedback/comments you may have. Please feel free to drop comments/questions directly into the Google Doc. I would appreciate receiving any comments by Wednesday, Jan. 15.

Finally, what is your opinion on asking school leaders to identify each school designer (from a drop down list) for whom they are giving feedback? In this case, each SD would have feedback specifically tied to him/her.

I appreciate your feedback and assistance as we implement this process!!

Thanks,
Vaishali

--

Vaishali Dharmadhikari
Doctoral Resident

Expeditionary Learning
247 West 35th Street, 8th Floor
New York, NY 10001

vdharmadhikari@elschools.org

Appendix K: Final Email to Regional Directors regarding National Survey

Update on Client Satisfaction Survey

Mark Conrad <mconrad@elschools.org>

Tue, Jan 14, 2014 at 9:39 AM

To: EL Regional Directors <RegionalDirectors@elschools.org>

Cc: Vaishali Dharmadhikari <vdharmadhikari@elschools.org>, Mindy Spencer <mspencer@elschools.org>, Katherine Paik <KPaik@elschools.org>, Tom Van Winkle <tvanwinkle@elschools.org>, Kemi Akinsanya-Rose <KAkinsanya@elschools.org>

Dear Regional Directors,

Based on the thoughtful and dedicated work of Vaishali Dharmadhikari, we are ready to move forward with our first-ever national Client Satisfaction Survey. The current version of the survey is available [here](#) and is almost finalized (but there is still time for feedback).

I am writing to ensure that all of you are clear on the plan for administration of this survey as some recent decisions have moved us away from previous discussions.

1. This survey that will be completed only by school leaders and will not be sent to teachers. The survey will be sent to leaders on January 27 and will be open until January 31.
2. This survey has been de-coupled from the Midyear Review Process. We realize that this means some school leaders will see two EL surveys this month but we felt that it would be helpful to have one strategy and timeline for administration of the survey.
3. Some of you have planned midyear check-in calls with leaders. Please know that the preliminary "raw data" from the survey will be available in early February if you want to review the information prior to your conversations.

Vaishali or I will be sending information about the survey to all school designers later this week. Please let us know if you have any questions about the survey purpose or process or think there are specific points we should clarify for SDs.

BIG thanks to Vaishali for her great work on this survey and to Mindy for her smart supervision of the planning process.

Mark

Mark Conrad
Chief Schools Officer
Expeditionary Learning
[413-253-7707](tel:413-253-7707) x 115 (office)
[443-519-8554](tel:443-519-8554) (mobile)

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Thinking in a New Direction

Appendix L: Staff Survey Questions about Collecting Client Feedback

Defining Clients and Satisfaction

Dear EL Colleagues,

Your answers to the questions on this brief survey will be informative and helpful in shaping EL's National work related to client experience and satisfaction data. If you have any questions or comments about the survey, please contact Vaishali Dharmadhikari (vdharmadhikari@elschools.org). Thank you for taking the time to respond!

*** Required**

What is your role at EL? *

- ☐ School Designer
- ☐ Professional Development Specialist
- ☐ Regional Director
- ☐ SST Member
- ☐ National Staff - Director Level

School Designer and PD Specialist Questions:

Defining Clients and Satisfaction

Do you think it is important to gather data on EL client experience and satisfaction regarding our products and services? *

- ☐ yes
- ☐ no

Please provide a rationale for your answer on the previous question *

Determining EL's Clients

Who do you think EL's direct clients are? *

In this case, "direct" refers to those individuals and entities with whom EL interacts firsthand to deliver products and services. Please check all that apply.

- ☐ Students
- ☐ Parents/Families
- ☐ Teachers/Staff
- ☐ Administrators
- ☐ Schools
- ☐ School Districts
- ☐ Community Members

- ☐ Other:

Gathering, Analyzing, Disseminating, and Using Client Satisfaction Data

What are some ways that EL's collection of client satisfaction data might be enhanced? *

EL already collects some client data through a variety of methods (informal conversations, regional surveys, etc.). Please identify which practices might enhance or improve this process (check all that apply).

- ☐ National Client Satisfaction Survey
- ☐ Structures and Processes for Analyzing, Disseminating, and Acting On Satisfaction Data
- ☐ More Frequent Collection of Satisfaction Data
- ☐ Region Specific Policies and Procedures Regarding Satisfaction Data
- ☐ Platform for Storing Satisfaction Data
- ☐ Refining Questions Asked of Clients
- ☐ Establishing an EL National Client Satisfaction Policy
- ☐ Other:

EL provides its clients a variety of products and services. On which of the following would it be useful to gather client feedback? *

Please select your TOP THREE CHOICES.

- ☐ School Designer and PD Specialist Coaching Services
- ☐ PD Institutes and Site Seminars
- ☐ Toolkits, Books, and other Print Resources
- ☐ Curriculum Modules
- ☐ Network Membership
- ☐ Other:

Please use this space to provide any other thoughts/ideas you have regarding EL and Client Satisfaction.

Regional Director, National Director, SST Member Questions:

Defining Clients and Satisfaction

Do you think it is important to gather data on EL client experience and satisfaction regarding our products and services? *

- ☐ Yes

- ☐ No

Please provide a rationale for your answer on the previous question. *

Using Client Experience and Satisfaction Data

How should EL use the information it gathers regarding client experience and satisfaction? Please give your thoughts on decisions that will be influenced by this type of data.

Should client experience and satisfaction data inform School Designer training? *

- ☐ yes
- ☐ no

Should client experience and satisfaction data inform School Designer assignments or allocations? *

- ☐ yes
- ☐ no

Should client experience and satisfaction data inform Institute Facilitator assignments? *

- ☐ yes
- ☐ no

Should client experience and satisfaction data inform Institute Offerings? *

"Institute Offerings" refers to locations of Institutes, numbers of Institutes offered, and the content of Institutes offered.

- ☐ yes
- ☐ no

Should client experience and satisfaction data inform methods of PD and Coaching delivery?*

- ☐ yes
- ☐ no

Are there any other decisions that should be informed by client experience and satisfaction data?

Determining EL's Clients

Who do you think EL's direct clients are? *

In this case, "direct" refers to those individuals and entities with whom EL interacts firsthand to deliver products and services. Please check all that apply.

- ☐ Students
- ☐ Parents/Families
- ☐ Teachers/Staff
- ☐ Administrators
- ☐ Schools
- ☐ School Districts
- ☐ Community Members
- ☐ Other:

Gathering, Analyzing, Disseminating, and Using Client Satisfaction Data

What are some ways that EL's collection of client satisfaction data might be enhanced? *

EL already collects some client experience data through a variety of methods (informal conversations, regional surveys, etc.). Please identify which practices might enhance or improve this process (check all that apply).

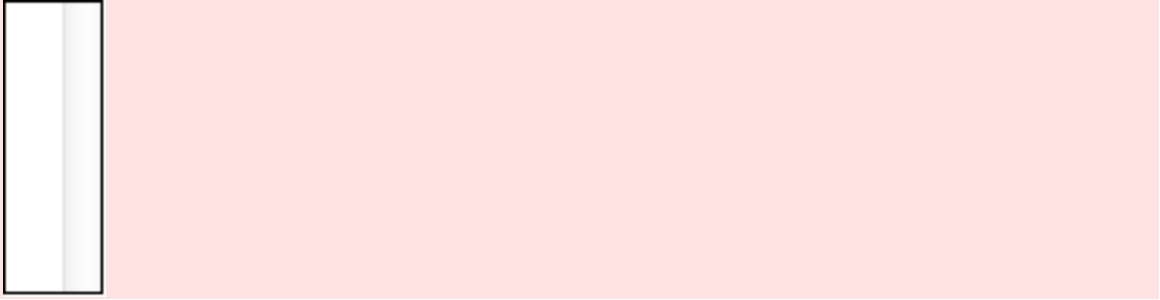
- ☐ National Client Satisfaction Survey
- ☐ Structures and Processes for Analyzing, Disseminating, and Acting On Satisfaction Data
- ☐ More Frequent Collection of Satisfaction Data
- ☐ Region Specific Policies and Procedures Regarding Satisfaction Data
- ☐ Platform for Storing Satisfaction Data
- ☐ Refining Questions Asked of Clients
- ☐ Establishing an EL National Client Satisfaction Policy
- ☐ Other:

EL provides its clients a variety of products and services. On which of the following would it be useful to gather client feedback?

Please select your TOP THREE CHOICES

- ☐ School Designer and PD Specialist Coaching Services
- ☐ PD Institutes and Site Seminars
- ☐ Toolkits, Books, and other Print Resources
- ☐ Curriculum Modules
- ☐ Network Membership
- ☐ Other:

Please use this space to provide any other thoughts/ideas you have regarding EL and Client Satisfaction.



Appendix M: Team Request Email – Director

Dear _____

How are you? I hope this email finds you well!

I wanted to reach out to see your interest/availability to serve on a collaborative team/working group related to the project work I am implementing at EL through my residency this year. I am attaching a fairly detailed description of the project, it's process, and potential timeline, but the gist of it is to approach the need/problem area of gathering, analyzing, disseminating, and using data regarding client experience and satisfaction through the frame/ of a continuous improvement process.

I know that you are probably already stretched to the maximum, so I want to assure you that I don't anticipate this would be a huge time commitment on the part of the working group. We will likely have a few meetings (via conference call or GoTo meeting) over the next 3-5 months to:

- Set aims for a data collection system
- Establish working measures and targets of client satisfaction
- Analyze data that is gathered
- Reflect on the process of implementation and collaboration

I would greatly appreciate your knowledge, expertise, and thinking with regards to these subjects and feel that you would be a tremendous value to the group. I also feel that since SDs are such an important element when thinking about client experience and satisfaction, this work could potentially have strong implications for your work supporting SDs.

If you have any questions about this ask or about my project in general, I'd be happy to speak on the phone. Please let me know what your thoughts are.

Thank you!

Vaishali Dharmadhikari
Doctoral Resident

Appendix N: Team Request Email – Field Staff

Dear _____,

Vaishali Dharmadhikari, a doctoral resident with EL this year (cc'ed on this email), is engaged in a project around gathering, analyzing, disseminating, and using data regarding client experience and satisfaction with respect to EL's products and services. She is looking to form a working group/collaborative team to assist with this project that would work together to:

- Set aims for a data collection system
- Establish working measures and targets of client satisfaction
- Analyze data that is gathered
- Reflect on the process of implementation

To accomplish these tasks, the group would likely meet 1-2 times per month (for about an hour) via conference call or Go To meeting from November-March. Prior to any meetings, Vaishali would send a few items (documents, data, agenda) to preview. **All told, being a member of this group would require no more than 5 hours of your time per month.**

As a School Designer, you provide an important and crucial perspective for this work, as you are the primary interface between EL and its clients. I know Vaishali would greatly value your input and thoughts!

Please feel free to reach out to Vaishali (vdharmadhikari@elschools) directly with any questions and to let her know your interest in and availability to join this group. ***She would greatly appreciate knowing whether or not you can join the group by Friday, October 18.***

Thank you for considering this ask!

Appendix O: Senior Support Team Presentation PowerPoint Slides



EXPEDITIONARY
LEARNING

Client Experience and Satisfaction

An overview and update on strategic project to date

Vaishali Dharmadhikari
November 12, 2013

Strategic Project Background

Focus and Guiding Question

- FY14 Organization Wide Goals¹
 - 8: Elevate consistency and quality in delivered programs through:
 - Customer satisfaction feedback loops;
 - Data-dashboards to track key student and school outcomes;
 - Improved inter-rater reliability on our Implementation review;
 - New third-party study focused on the impact of our literacy curriculum and associated professional services.

How can EL become a more data driven organization in order to ensure uniformity of quality of client experience, and ultimately, client satisfaction?

¹ Expeditionary Learning FY14 Organization Wide Strategic Goals

Guiding Question Operationalized

What systems and structures need to be put in place in order to:

Gather data effectively and efficiently

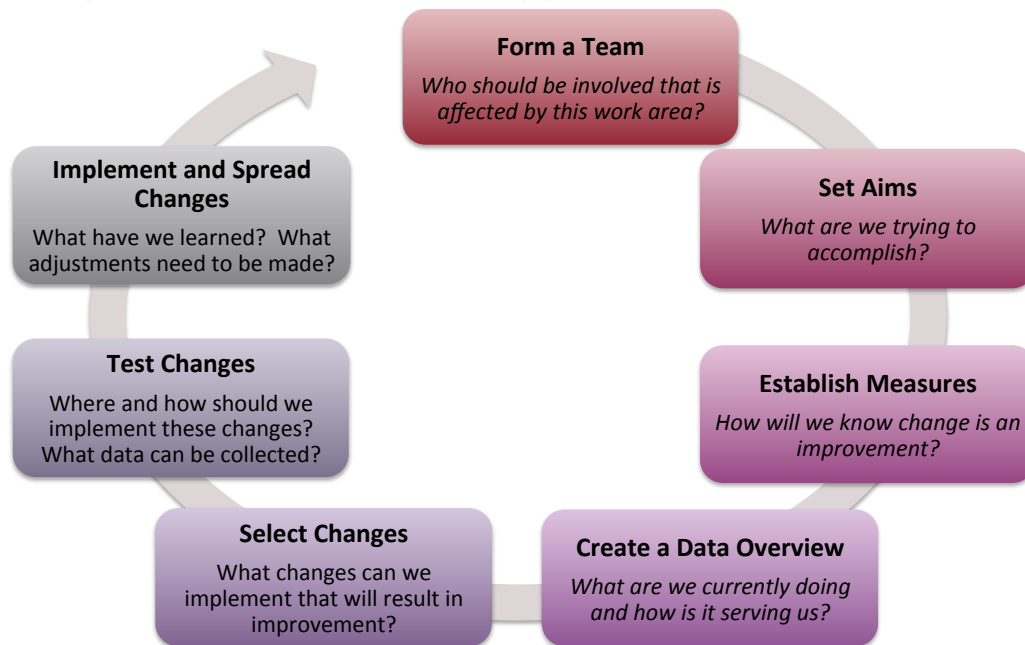
Analyze the data

Disseminate the data in meaningful, effective, and efficient ways

Use the data to make informed decisions

4

Improvement Process² Approach

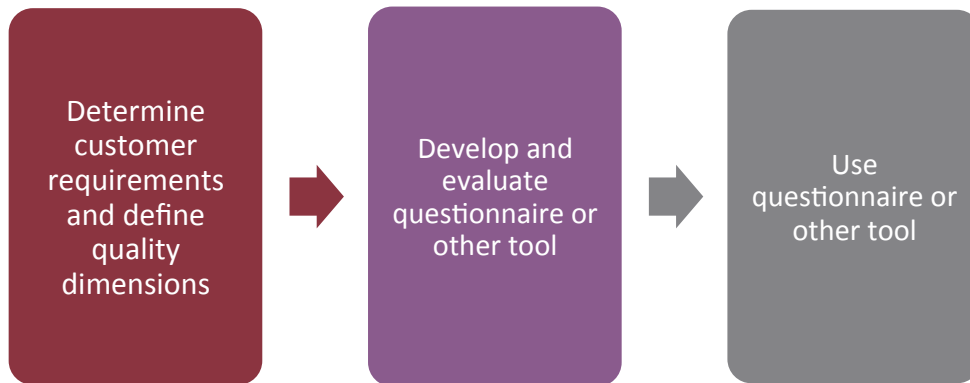


2 Adapted from Datawise (Boudett, City & Murnane, 2004) and Model for Improvement

5

Synthesis of Customer Satisfaction Literature (to date)

Model for developing customer questionnaires and tools to gauge customer satisfaction³:



3 Hayes, 2008

6

Synthesis of Customer Satisfaction Literature (to date)

- Widely used 5 key determinants of service quality⁴:
 - Reliability
 - Tangibility
 - Responsiveness
 - Assurance
 - Empathy
- Quality dimensions should be determined through various sources:
 - Organizational staff who are knowledgeable
 - Customers (Critical Incident Approach) and their expectations
 - Industry Literature

4: Parasuraman, Zeithaml, & Berry, 1985

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EL's Products and Services

Products

EL Commons
Toolkits and Books
Core Practices
Curriculum Modules

Services

PD Institutes and Site Seminars
School Designer Coaching
PD Specialist Facilitation and Coaching

Products/Services

Network Membership
Mentor School Membership
Credentialing Process (EL Credential)

8

Dimensions of Service Quality *Applied to School Designer Coaching*

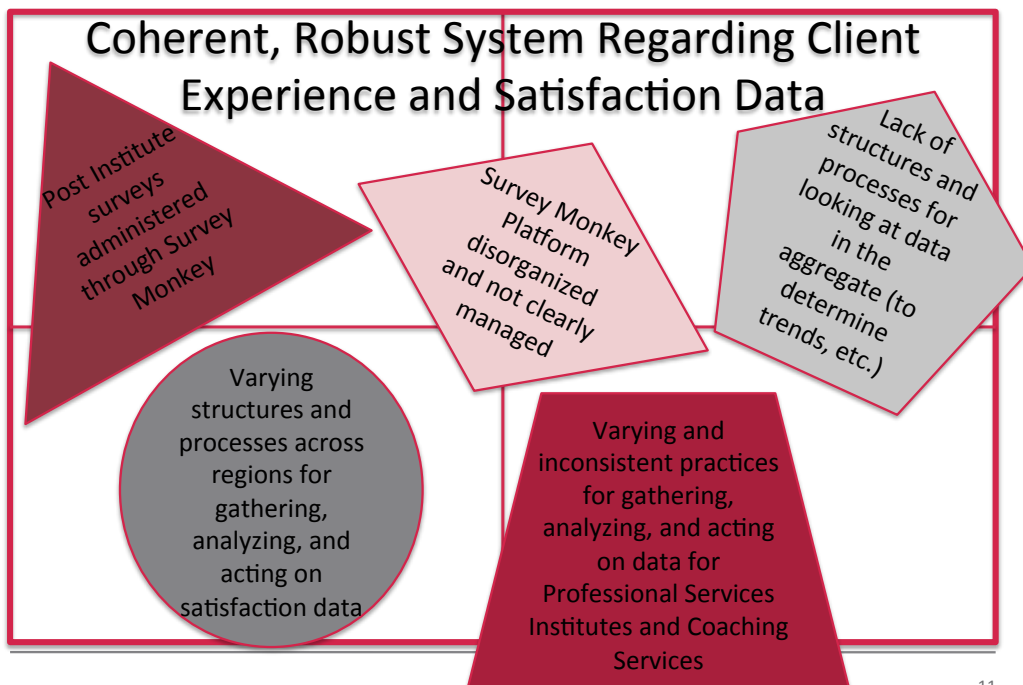
Dimension	Definition	Application to SD Coaching
Reliability	Capability to do the promised service accurately and dependably	- SDs ability to deliver coaching services - SDs ability to support schools in meeting work plan goals, achieving high levels of implementation
Tangibility	Physical properties, appearance of personnel and equipment	- Organization, professionalism, communication of SDs
Responsiveness	Ability of staff/provider to react promptly	- SDs ability to adapt to context and make adjustments as necessary - SDs ability to respond to client needs
Assurance	Knowledge of staff and their capability to inspire confidence and trust	- Knowledge competencies of SDs - Relationship building and management aspect of SD coaching
Empathy	Caring, individualized interest provided to customers	- SDs ability to establish effective relationships

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Current State of Customer Satisfaction at EL

What do you notice? What do you wonder?

Current State



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Staff Survey – Customer Satisfaction

Overview

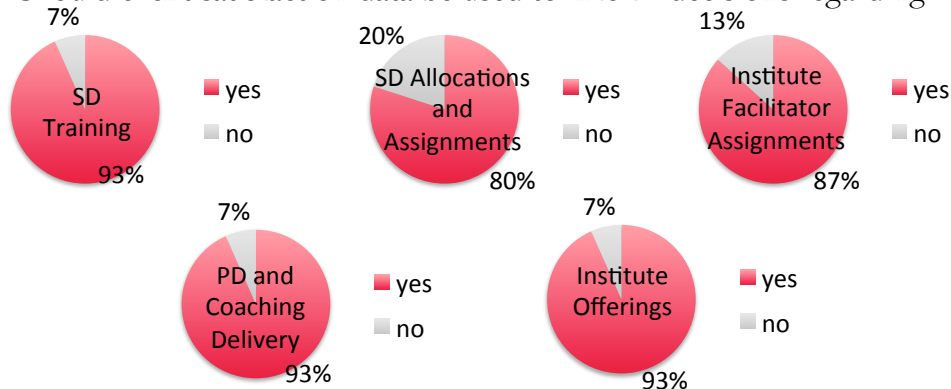
- Goal of Survey
 - Gather information on the feelings and perspective of connected/affected staff
- Survey administered across the organization to:
 - School Designers
 - PD Specialists
 - Regional Directors
 - SST Members
 - Directors and Associate Directors

- 27 out of 41 responded
- 3 out of 4 responded
- 4 out of 6 responded
- 3 out of 7 responded
- 9 out of 12 responded

12

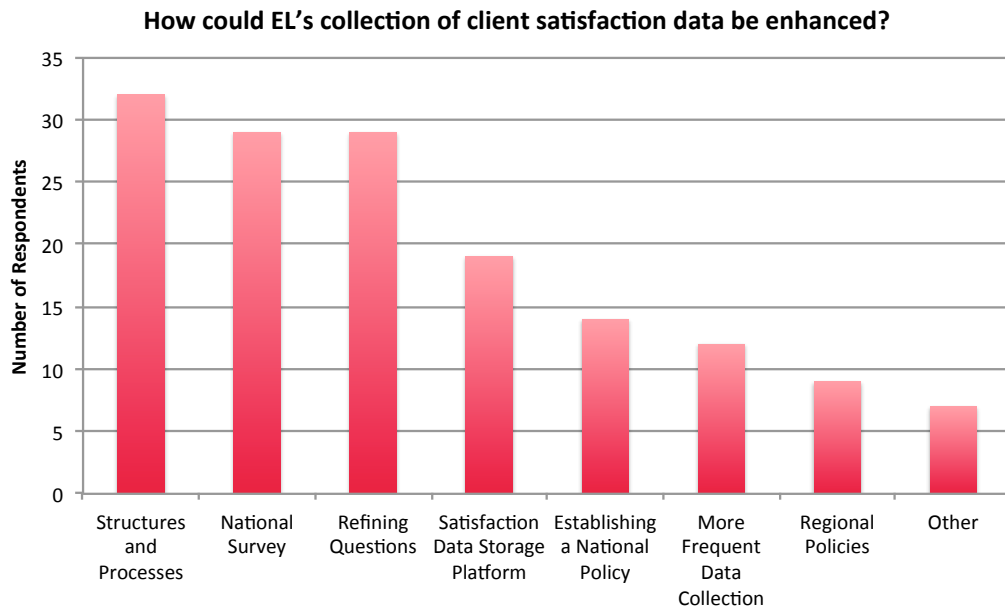
Survey Results – Summary

- 100% of respondents agree that **gathering data on client experiences and satisfaction regarding EL's products and services is important**
- Should client satisfaction data be used to inform decisions regarding:



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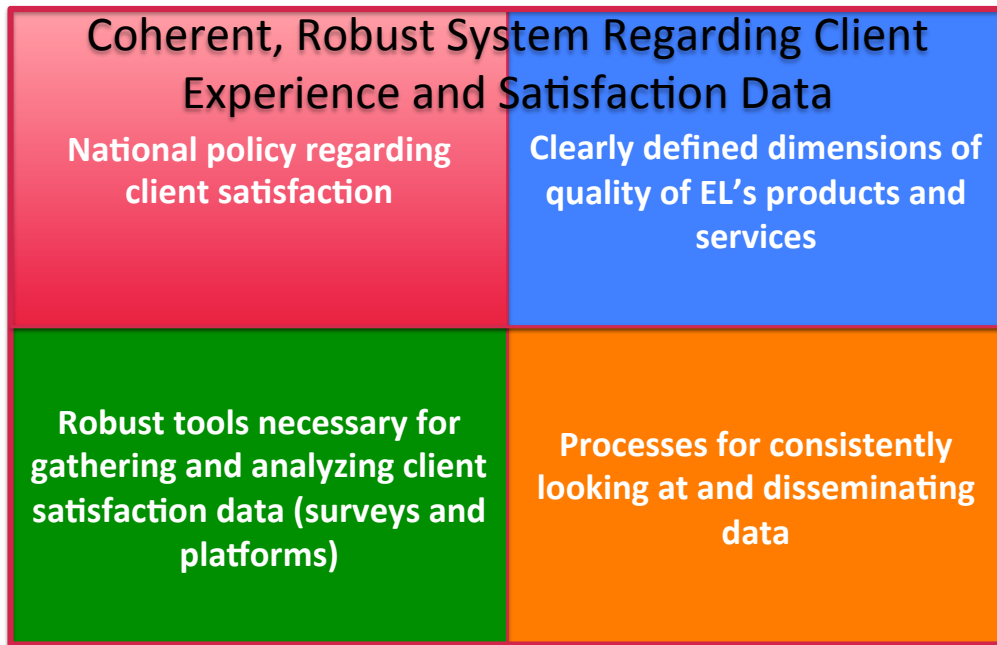
Survey Results – Summary



14

Recommendations and Potential Next Steps

Ideal State



16

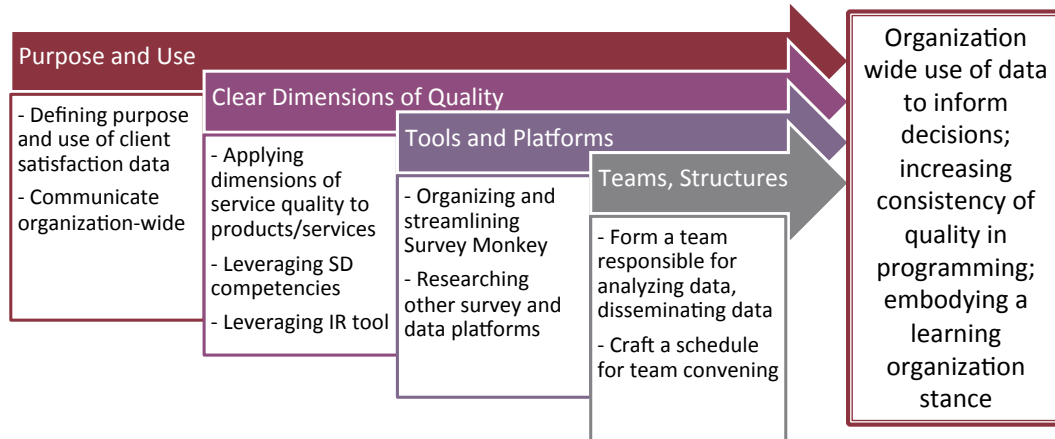
Next Steps

- Develop a national policy on client satisfaction:
 - Clearly articulate and communicate a goal/purpose regarding gathering, analyzing, and acting on client satisfaction
 - Determine **if, how and/or to what degree** client satisfaction will inform a variety of decisions (programmatic, staffing, partnership, pricing, etc.)
- Refine application of dimensions of quality on EL's products and services
 - Determine criteria from which satisfaction can be gauged and feedback gathered
- Explore platforms and create tools for gathering, storing, and analyzing client satisfaction data
- Form a team charged with examining client satisfaction data on an annual or bi-annual basis and communicating high-level summary

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Revisiting Guiding Question and Focus

How can a systematic approach to client satisfaction data help?



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References

- Boudett, K. P., City, E. A., & Murnane, R. J. (Eds.). (2005). *Dataverse: A step-by-step guide to using assessment results to improve teaching and learning*. Cambridge, MA: Harvard Education Press
- Hayes, B. E. (1998). *Measuring customer satisfaction: Survey design, use, and statistical analysis*. Milwaukee, WI: ASQC Quality Press.
- Langley, G. L., Nolan, K. M., Nolan, T. W., Norman, C. L. & Provost, L. P. (2009). *The improvement guide: A practical approach to enhancing organizational performance* (2nd edition). San Francisco: Jossey-Bass.
- Parasuraman, A., Zeithaml, V., & Berry, L. 1985. A conceptual model of service quality and its implications for future research. *Journal of Marketing*, 41-50.

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Appendix P: Institute Keepers Survey Questions

Information on Use of Survey Monkey Data

As an Institute Keeper, you have access to participant feedback housed on Survey Monkey for previous years' Institutes. Please answer this brief questionnaire to provide information on how you used this feedback during the Institute revision process and what suggestions you might have for refining the surveys and/or the revision process. Thank you!

*** Required**

Was your Institute offered during SY2012-2013? *

- ☐ yes
- ☐ no

*** Required**

Information on Use of Survey Monkey Data

Since your Institute was offered during the previous school year, please answer the following questions on your use of the previous Institute's feedback data.

Did you access/use the previous year's Survey Monkey data during the revision process for your Institute? *

- ☐ yes
- ☐ no
- ☐ Other:

Information on Use of Survey Monkey Data

You responded "yes" or "other" to accessing/using the previous Institute's feedback data during the revision process. Please answer the following questions about your use of this data.

What did you do with this data? How did you do it? Who else, if anyone, did you involve? *

Please provide any information on data analysis you completed, questions you asked, and processes used.

What did you learn from looking at the data? *

How did this information inform any Institute revisions? *

May I contact you to gather further information regarding the data analysis processes you completed? *

If yes, please type your name in the text box. If no, please type "no" in the text box.

What changes, if any, might be made to the surveys to make the data more useful? *

Please check all that apply.

- ☐ More specific, focused questions
- ☐ Alternate survey form (paper survey as opposed to online)
- ☐ No changes necessary
- ☐ Other:

What changes, if any, might be made to the Institute Revision process to make use of (or better use of) this feedback data? *

Information on Use of Survey Monkey Data

You responded "no" to accessing/using the previous Institute's feedback data during the revision process. Please answer the following questions about this.

Were there any particular reasons you didn't use/access the data? *

Please check all that apply.

- ☐ Not enough or no survey respondents
- ☐ Not enough time to analyze or look at the data
- ☐ Unsure or unclear of how data might connect to or inform revisions
- ☐ Data was too general, not specific enough
- ☐ Other:

What changes, if any, might be made to the surveys to make the data more useful? *

Please check all that apply.

- ☐ More specific, focused questions
- ☐ Alternate survey form (paper survey as opposed to online)

- ☐ No changes necessary
- ☐ Other:

What changes, if any, might be made to the Institute Revision process to make use of (or better use of) this feedback data? *

•

Information on Use of Survey Monkey Data

Your Institute was not offered last year, however, if you have any thoughts or responses to the following questions, they would be greatly appreciated!

What changes, if any, might be made to the surveys to make the data more useful?

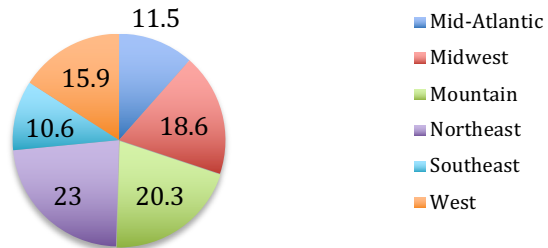
Please check all that apply.

- ☐ More specific, focused questions
- ☐ Alternate survey form (paper survey as opposed to online)
- ☐ No changes necessary
- ☐ Other:

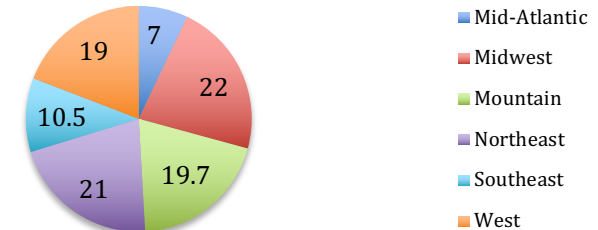
What changes, if any, might be made to the Institute Revision process to make use of (or better use of) the Survey Monkey feedback data?

Appendix Q: Draft Client Feedback Data Analysis Report

Percentage of Total Respondents



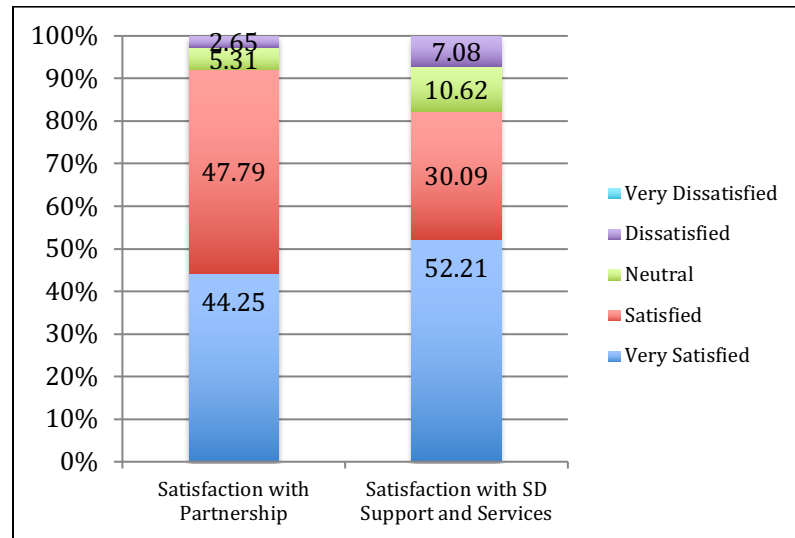
Percentage of Total Schools



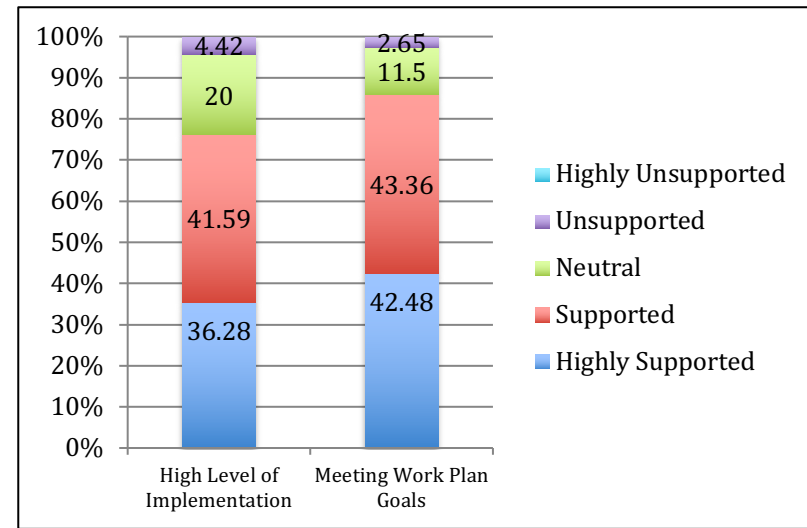
Note: More than one response might have come from a school, increasing the percentage a region occupies in the total responses

Overall Satisfaction and Levels of Support

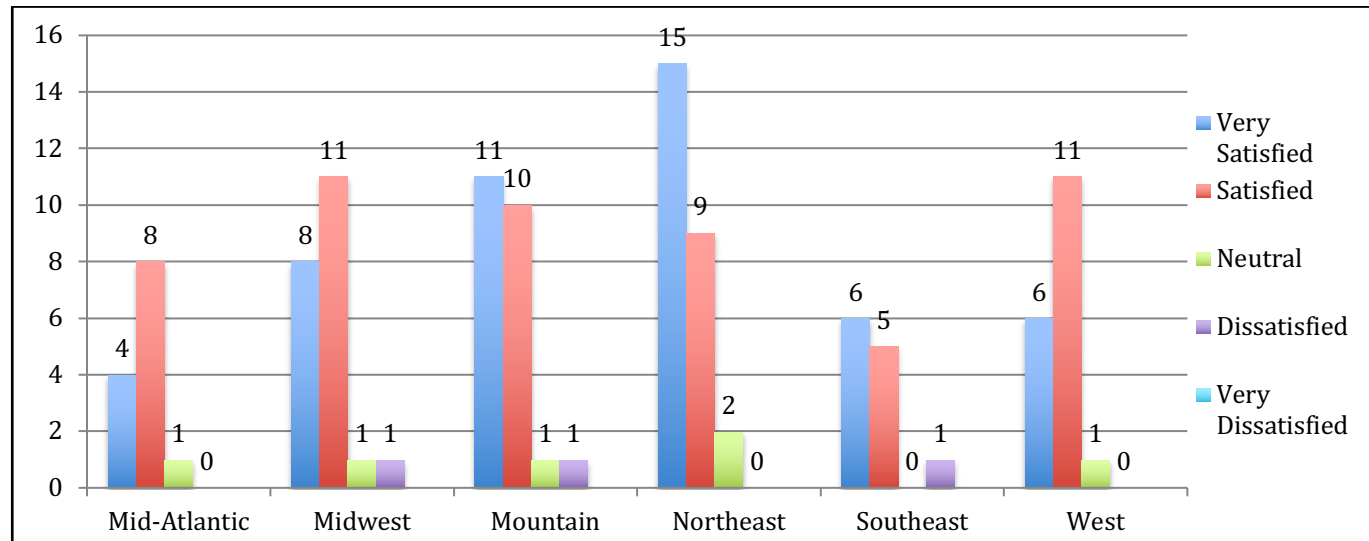
Overall Satisfaction: Percentage of various responses received



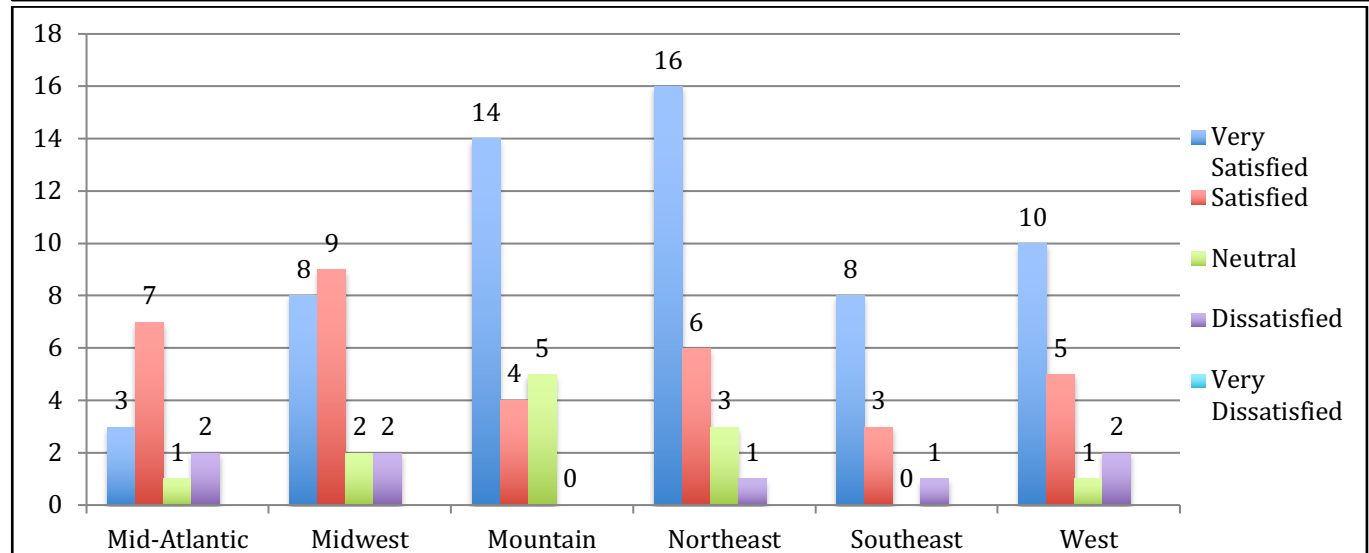
Overall Level of Support: Percentage of various responses received



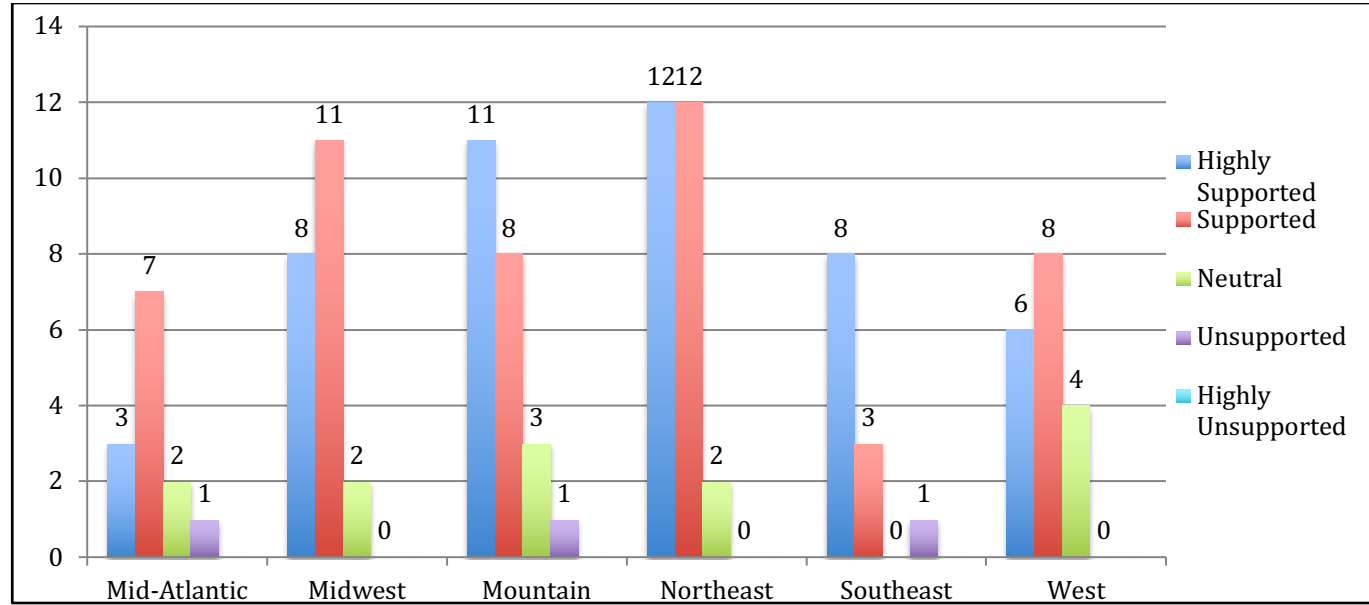
Overall Satisfaction with Partnership by Region: Numbers of Responses



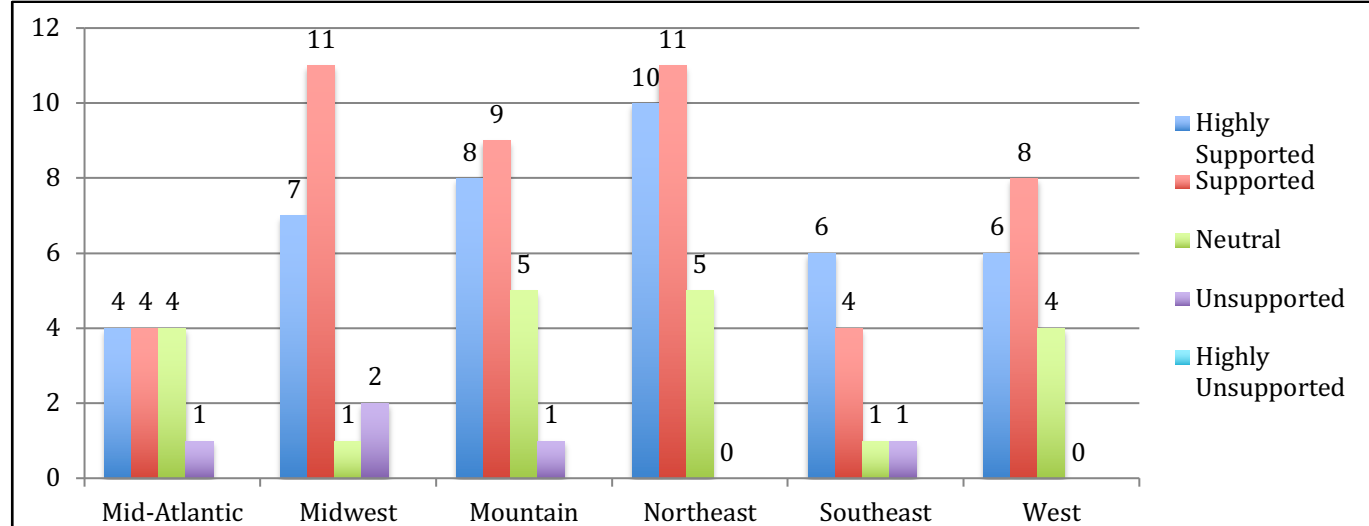
Overall Satisfaction with SD Services and Support by Region: Numbers of Responses



Overall Level of Support for Meeting Work Plan Goals by Region: Numbers of Responses



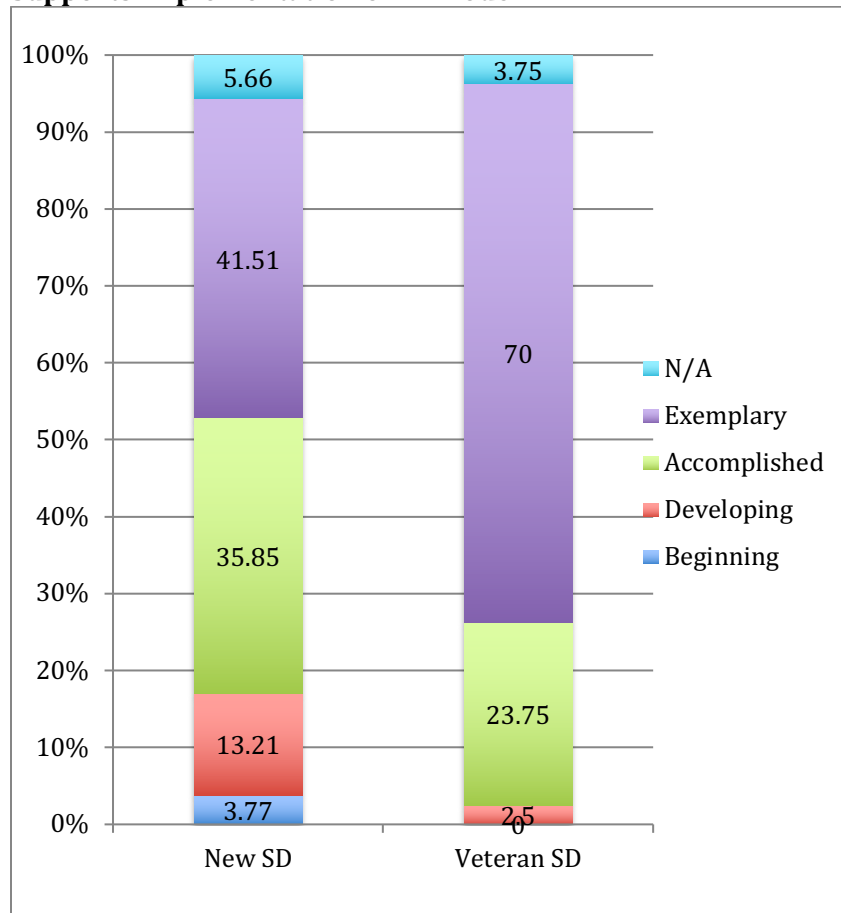
Overall Level of Support for High Level of Implementation by Region: Numbers of Responses



School Designer Feedback

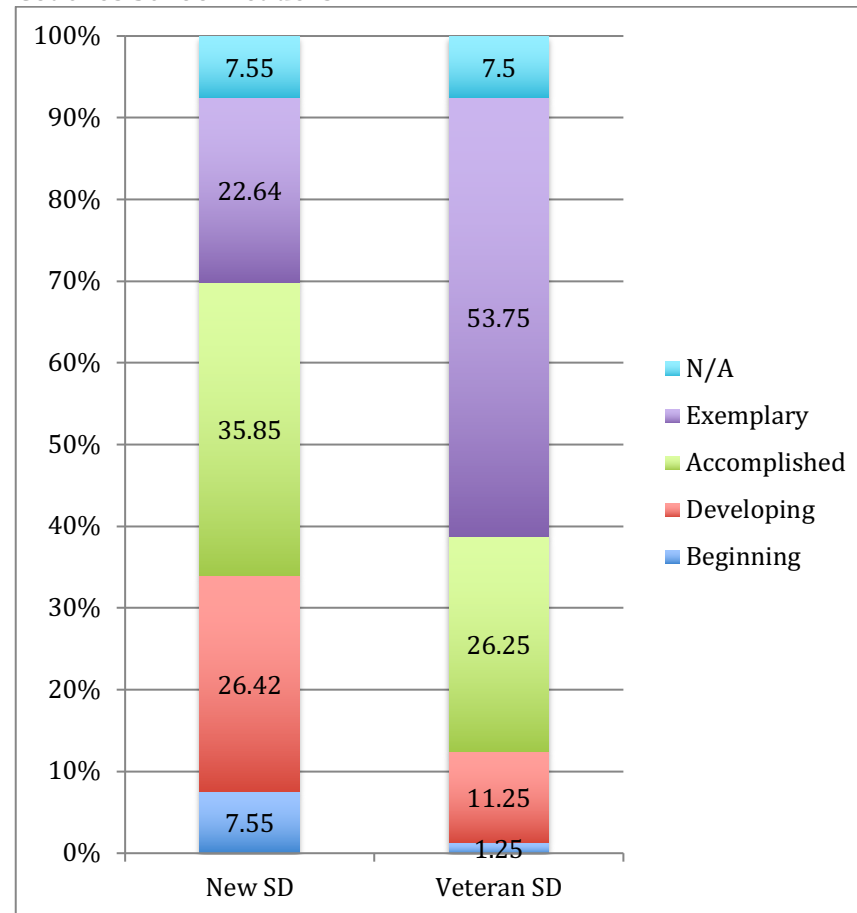
Percentage of Each Response for Select Questions Regarding School Designer Support and Services

Supports Implementation of EL Model



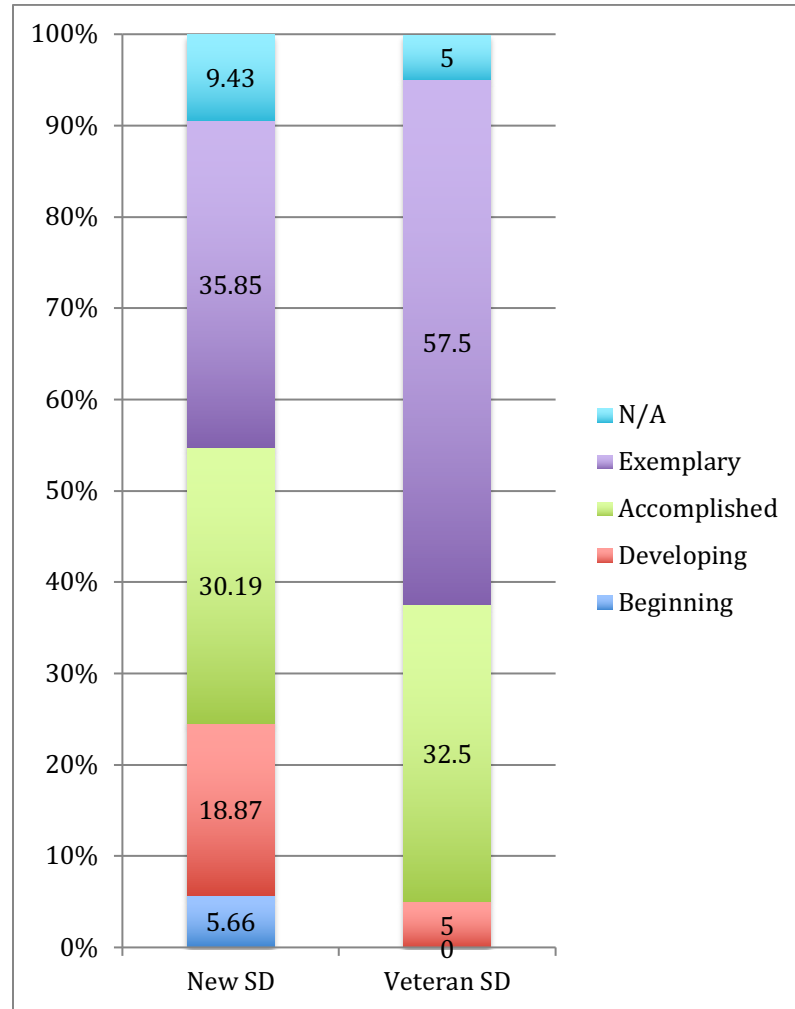
Note - New SD Beginning Percentage: 3.77, Veteran: 0

Coaches School Leaders



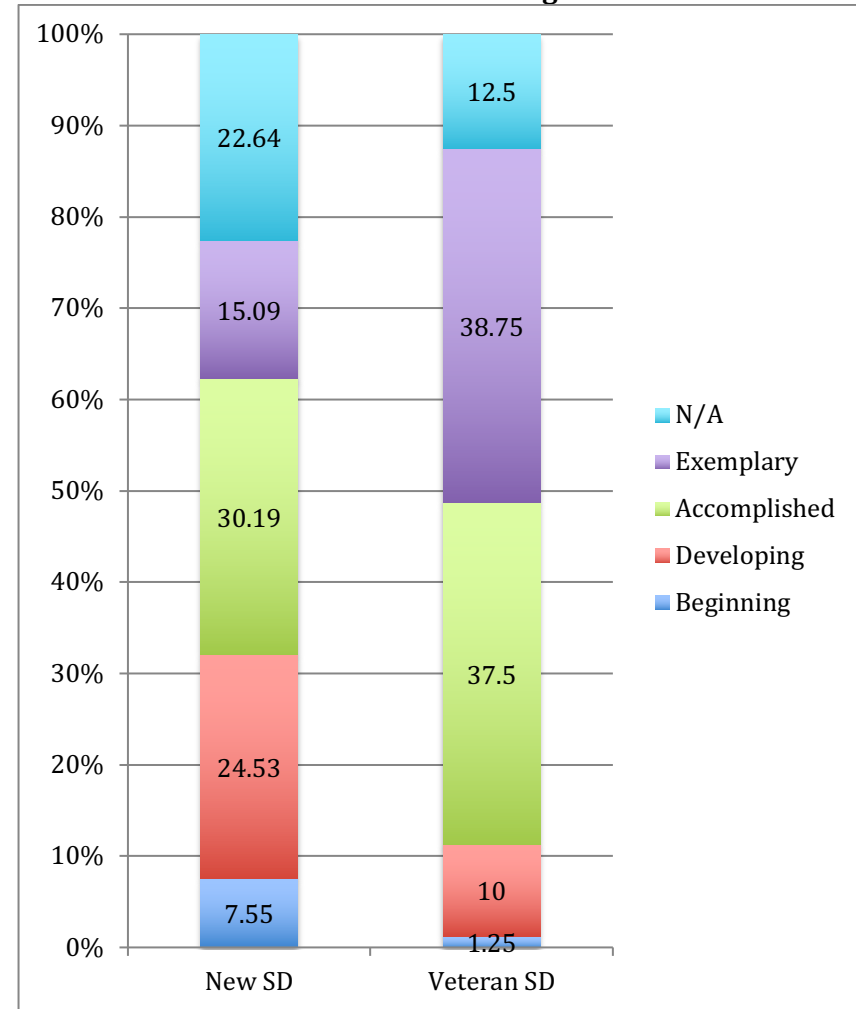
Note - New SD Beginning Percentage: 7.55, Veteran: 1.25

Plans and Delivers Effective PD



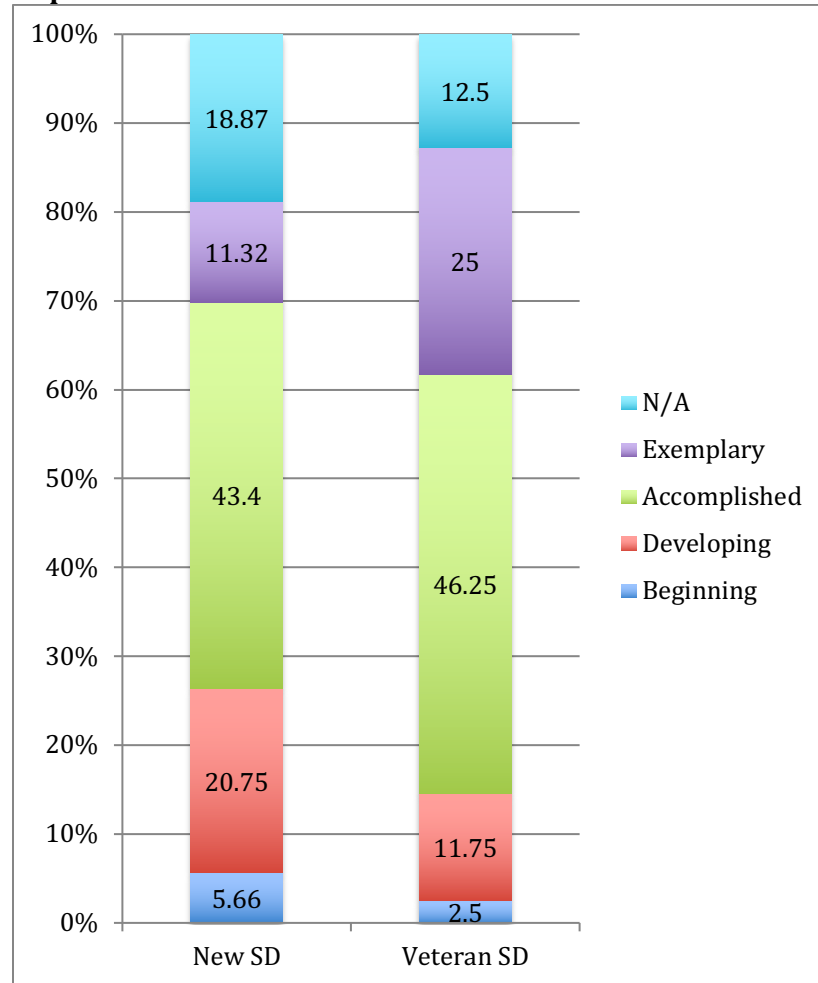
Note - New SD Beginning Percentage: 5.66, Veteran: 0

Effective Use of Data in PD and Coaching



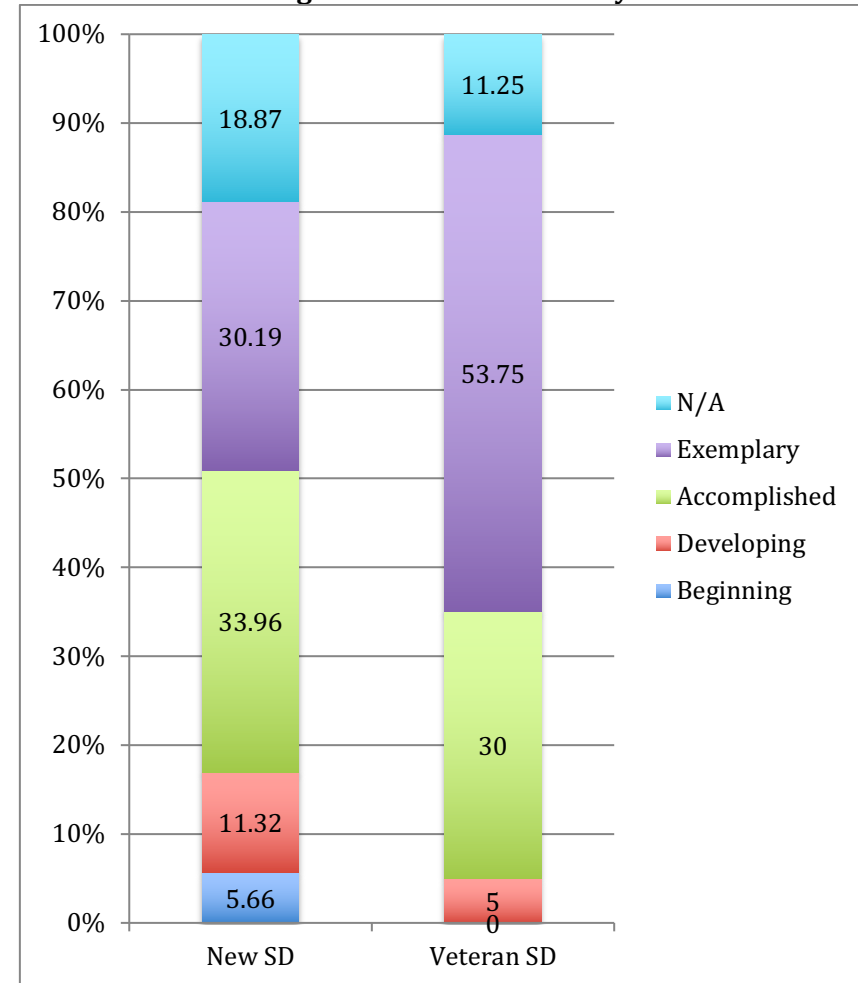
Note - New SD Beginning Percentage: 7.55, Veteran: 1.25

Impacts Traditional Student Achievement Measures



Note - New SD Beginning Percentage: 5.66, Veteran: 2.5

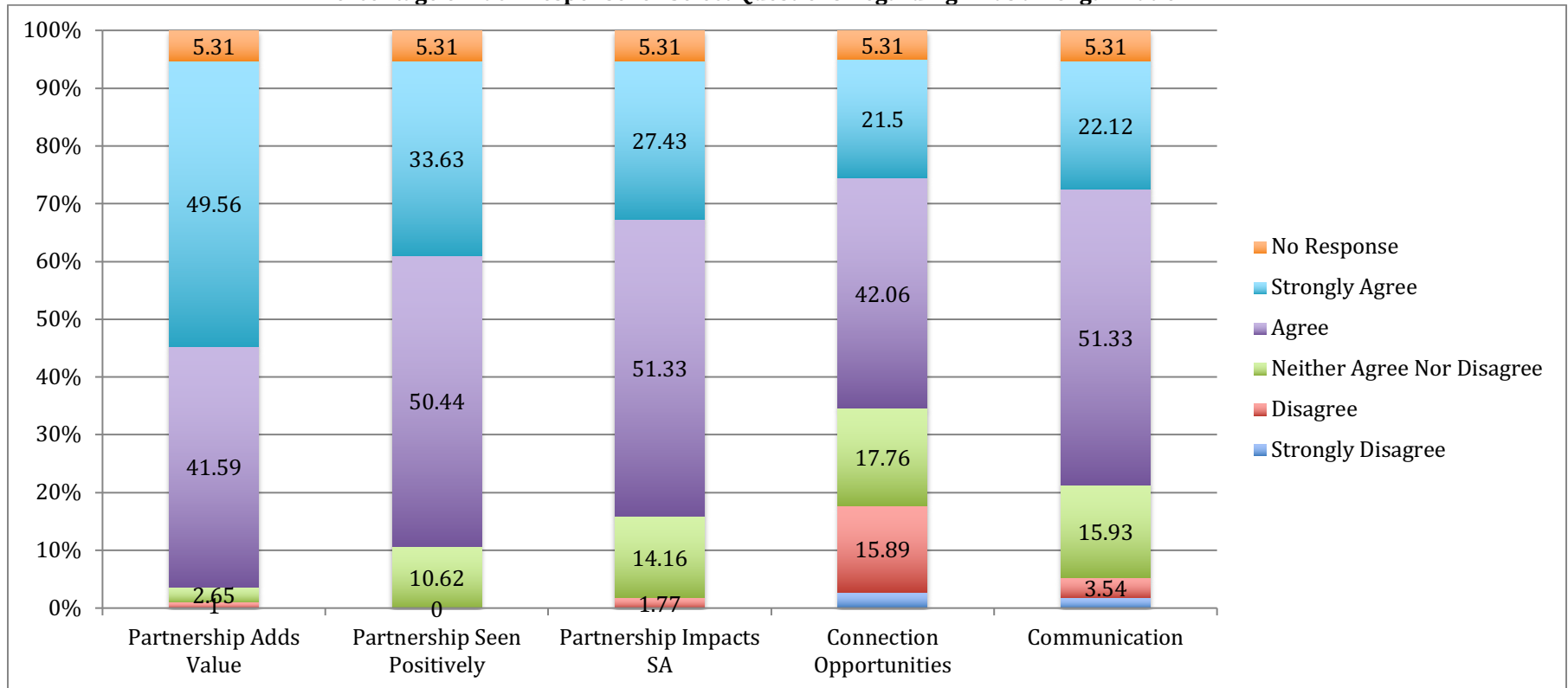
Addresses and Manages Conflict Productively



Note - New SD Beginning Percentage: 5.66, Veteran: 0

EL Organization Feedback

Percentage of Each Response for Select Questions Regarding EL as an Organization



Trends in Comments

Access to and time with SD

Summary: *Many schools reported that their ratings of neutral or dissatisfied actually represent a lack of access to their School Designer. They report difficulties finding enough time with their School Designer or aligning on-site days to a school's PD calendar. Additionally schools report that their School Designers often have very packed schedules and 'a lot on their plates'.*

- Jen Wood is amazing, talented and intentional. The neutral marks above are not due to her, but to the access we have to her. She is not able, due to her schedule with other schools, to be a part of our PD. This means 4,5,6 are hard to measure. She is quality, but we do not have her aligned to quality moments.
- Emily Lichtenstein's is highly supportive in assisting staff in meeting the targets of our Work plan and increasing the level of implementing EL practices. The quality of support provided by Emily is excellent. The challenge is that our level of partnership, on- site SD days, is minimal which is why I rated #3 and #6 as "supported". The rating doesn't reflect the high quality support that Emily provides us.
- We are still working on figuring out how to best utilize our school designer. She provides excellent professional development at staff meetings and that directly supports our workplan. This consists of 1.5 hours after the normal school day. During the day we have gotten subs and set up specific collaboration times with the teachers and school designer. This time does not seem very productive. We are still learning how to best utilize our SD during the day when teachers are in session. When observations have taken place, teachers have not received specific feedback and there isn't time to debrief with her due to the schedule. Recently we have used her to work with the directors on creating a common knowledge binder. She has been very helpful in completing tasks that the school has needed for years. The best use of her is when she is running PD. However, we don't have her on any of our professional workdays and it seems that having her during school days isn't as beneficial.
- The challenge that is most important for us to work through at this point is the level of service and time on site during on site days. I think it's reasonable for our SD to be present at the school from 8-4:30 on a regular basis and extended as needed to support teachers if requested. Initiating work with new teachers or being more open to working with new teachers has improved- I'd like to see this continue to grow. We are working on our communication about rescheduling days on both of our ends there have been many due to snow and at times her schedule.
- The reason for the Supported rather than Highly Supported for # 5 and #6 is because of the limited days we have with our school designer. Dale does a fantastic job supporting us. We could just use more time with him.

Contract Size and Costs

Summary: *Schools report that they are evaluating the value of the partnership versus the cost of the partnership. Some schools report that cost of contract is becoming prohibitive to accessing the services and supports they feel they need.*

- Contract costs have become prohibitive for us and we are re evaluating the value add of this partnership. We are a small rural school and sometimes get the message that although we partner and pay for that partnership and support. We hear it is viewed that our participation in EL is not strong or valued. It seems the organizations believes it has outgrown us, which is unfortunate for us and for you.

- We have a small contract with few on site days. Find it challenging to weave work plan into such a busy schedule. Sometimes feel that I don't utilize my school designer well so that value add is medium.
- Our contracted on-site days are not enough.
- Our School Designer is a great person, and one-on-one he is incredibly helpful, but his plate is very full and that makes it difficult for us to feel like we are getting enough support, but I want to clarify that this isn't a judgment on his performance, but perhaps a problem with the overall structure of the system. Overall, the events, like site visits, local trainings, seminars, and leadership workshops are fabulous and have a direct and positive impact on our school, and truly on my development as an administrator. EL conference is by far the most valuable resource. The funding system is pretty broken. Schools need to be able to directly account for every penny. I don't know what my monies are paying for in most circumstances. If fees are required for specific events and services, those things need to be better accounted for. Otherwise, it should just be one straight membership fee. I realize the company is growing (and I love EL, for sure), but the funding model needs some significant work.
- This is where I struggle with EL and with the fees associated with being a part of the network (beyond paying for School Designer time). Being a part of the network has helped us substantially as we planned the school, opened in 2007, and for the first several years when we could afford staff development. This year we spent over \$22,000 and have two staff members attending one institute (2.5 days), still at our expense for room/board and travel. The national network fee needs to be reworked or we will struggle to justify remaining a part of the network. Since this is a negative review of the national network, I want to be clear that this does not reflect the value of direct staff support from Tony or John. This also does not reflect the years of support in implementation of many of the great aspects of EL in our school (e.g.: Crew). Your network fee should slide based on access to network support (i.e. workshop costs can include overhead). Right now we're paying for a network that we cannot afford to access.

Two School Designers

Summary: *Schools report that sometimes having two School Designers working with the same school can be challenging.*

- We have two school designers. The only criticism I have is that at times it feels and seems as if the two designers are not on the same page between themselves on the delivery of services to our school.
- I am very satisfied with the support and work from one of our two assigned school designers, I feel that she has done the work of two.
- Our two school designers have different strengths, which makes a very dynamic team. They have been incredibly helpful in this first year at guiding our work.

Institute Offerings

Summary: *Schools report wanting greater diversity in the location of PD offerings, more PD offerings, and an easier process for signing up for PD.*

- Access to PD opportunities especially site seminars and institutes is very difficult and frustrating. Procedures and timeframe for decisions to attend a PD is very cumbersome and not flexible to a conservator the changing needs of schools. We are wait listed for all of our choices that were aligned with our work plan. Instead we had to change and send people to PD that was not necessarily aligned. I suggest creating PD opportunities after schools

develops their plans so that input can drive the offerings. Also, consider demand for particular sessions and respond to the demand by adding additional opportunities.

- The MOU process for reserved institutes/site seminars, etc. needs to be address. The process is confusing and doesn't allow all school an equal opportunity at EI-PD opportunities. Call me if you have any questions, I would love to help. /
- I just wish we had more institute options and more opportunities to collaborate with other EL schools on building our capacity, which I feel our school designer (or regional director) could facilitate.

Positive Change Over Time

Summary: *EL has experiences change and growth over time, but schools seem pleased with the direction. Some schools anticipate the challenges of changing staff and worry about continuously having to re-establish relationship with School Designers.*

- EL has come a long way these past three years! There is a higher level of professionalism in the organization. And, the new tools are what we have needed.
- We have been pleased with our school designer. They have worked hard to establish relationships with my staff. I am concerned that we will have new designers and have to establish new relationships.
- Once again we are feeling the challenge of a change in a school designer. It takes awhile to get into the rhythm and routine with a new designer and it feels like precious work time is lost with that change.