Supporting Schools to Transform Teaching and Learning

AN IN-DEPTH REPORT ON THE SERVICE PROVIDERS SUPPORTING SCHOOLS AND DISTRICTS THROUGH SCHOOL MODEL REDESIGN
About Edsurge

EdSurge was started in 2011 by Betsy Corcoran, Matt Bowman, Nick Punt and Agustin Vilaseca to connect the emerging community of edtech entrepreneurs and educators. We wanted to share detailed information about what new technologies could—and could not—do to support learning.

WE REPORT ON THE LATEST NEWS AND TRENDS IN THE EDTECH INDUSTRY TO HELP:

- Entrepreneurs who build new products and businesses;
- Educators who use these tools;
- Investors and others who support companies and schools.

In addition to reporting on trends, we share other information vital to all in the learning ecosystem including available jobs, opportunities and events. We are building a database of rich information (the EdSurge EdTech Index) about emerging products and how they’re used; we also run a series of Edtech Summits where educators and entrepreneurs meet on common ground and exchange feedback about how to build and refine tools to improve educational outcomes.

We also do research that provides entrepreneurs and educators with information to make decisions, inform practice and build bridges of communication between communities. We connect a growing community of readers to reporting, market intelligence, and independent research that is easy to consume and fits into the daily life of educators and entrepreneurs.

With the right tools, technology can transform “learning” from something we did in classrooms at fixed hours of the day to something we can do anywhere, anytime.
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Forward

We live in a changing world. Nowhere is this more apparent than in our schools. At the heart of this change lies the fact that the technology students have at their disposal shapes the skills they need to develop in order to be successful. Our learners no longer have to memorize facts and formulas. A simple Google search can fill in many knowledge gaps. They can look to the cell phone in their hands to create, communicate and interact with the world in very different ways than they could even ten years ago.

These changes have prompted conversations about what, when, why and how we teach, which have challenged many of the assumptions we once had around schooling. In response, educators are asking big questions about how schools are designed and how we can improve approaches to teaching and learning.

As schools and districts explore these questions, many are taking risks and experimenting with making changes to their school models in order create new ones that better support students. These changes can be large or small, impacting an entire district or one classroom at a time. But regardless of size, with every change comes a set of deep, interconnected questions: why do we want to change teaching and learning, what changes do we want to make, and how we will make these changes?

To answer these questions, the school community often uses some type of redesign process. Some call it design thinking, lean design or even the scientific method. Whatever the name, rest assured that there is nothing simple about the process of school redesign.

Much like a game of Jenga, move one piece and everything changes. A school building is a complex place, with an endless collection of components that affect each period, day, semester and year. As schools and districts set out to make changes, administrators and educators find themselves asking many questions along the way about the elements of school that impact their students the most. This research aims to help educators, administrators and school leaders identify how the questions they have about redesign align with a set of services and resources that can help them transform.

Some schools and districts manage the journey on their own, leveraging the expertise of existing staff members. Others turn to colleagues, schools and districts in their community of practice and replicate what is working for others. In many cases, however, school and district leaders decide that they require external support and look for experts in specific areas that can help them transform.

A whole market of these experts, or service providers, exists to help answer these questions. These experts come in many shapes and sizes. They can be companies, nonprofits, individual consultants, and in some cases, schools themselves that codify what has worked for them and offer direct support to others.
Forward — (cont)

With this project, we will identify the most common questions being asked as schools redesign their models. We will share profiles of different types of consultants and organizations that support schools through transformation, as well as a list of experts in the market and the questions they are best positioned to answer.

We hope this work will create more transparency around each service provider’s specialty, giving educators and administrators the power to reach out to the right people at the right time throughout their journey to redesign teaching and learning.

-Marisa Kaplan, Research Project Manager
Acknowledgements

Over the past six months, we have been researching school transformation and the industry of service providers and consultants that support schools and districts as they experiment with new models. This report reflects conversations with over 30 different educators, administrators, catalyst organizations and funders such as EDUCAUSE, LEAP Innovations, NewSchools Venture Fund, CESA 1 and Silicon Schools Fund, as well as interviews with experts from nine service providers who support the process of school model redesign. We also conducted a survey of over 25 companies supporting schools and districts through various types of change.

We are full of gratitude for the five organizations that spent hours on the phone with us painting an in-depth picture of what their work with schools and districts looks like in action. Their stories from the field and willingness to share successes and challenges provided deep insights into the complex world of school transformation. The individuals from these organizations include: Adam Rubin from 2Revolutions, Cat Alexander from CA Group, Keara Duggan from Education Elements, Jeffrey Tsang and Samir Bolar from Mastery Design Collaborative, and Jeff Wetzler and Aylon Samouha from Transcend Education. (We aimed to include Alvo Institute but the company is going through a transition due to the sudden loss of their co-founder Rebecca Tomasini. The Alvo Institute made a decision not to have a profile included at this time, but have continually been noted as an influential and leading organization in this field.)

Additionally, 26 organizations filled out our survey to identify their area of expertise and share how they align with the categories in our framework. We are incredibly grateful for their enthusiasm and thoughtful responses. These organizations are: Afton Partners, ARC Impact Solutions, Center for Collaborative Education, Cross & Joftus, Dellicker Strategies, DLR Group, District Management Council (DMC), Education First, ExpandEDSchools, Generation Schools Network, The Great Schools Partnership, Highlander Institute, Ideo, Insight Education Group, KnowledgeWorks, Learning Forward, McRel International, Parthenon Group, PowerMyLearning, Public Impact, Ready to Blend, Springpoint, Teachers 21, Teton Science Schools, TNTP and UPD Consulting.

A number of EdSurge staff collaborated to create the report. Christina Quattrocchi, Director of Research and Development, was involved in every aspect of this work, providing support building the framework, doing research, helping to construct the market map and editing content for the profiles. Mary Jo Madda, Senior Editor, brought her experience from the classroom and reporting on this field into the process of building the framework, providing deep insights into the essential questions that educators and administrators are asking along the way. Mary Hossfeld edited the company profiles and Lise Chapman designed images for the framework and market maps.

Through the support of the Bill & Melinda Gates Foundation we are able to make this report freely available to all.
Using This Report

The purpose of this research is to help educators, administrators and district leaders identify the right resources and support for any part of the process of transforming their schools. Some schools and districts need support throughout the entire process of redesign, while others are looking for assistance with one aspect of their work. We hope that our research will help practitioners find the right resources when they need them.

There are four components of this report, including a framework for categorizing service providers, three market maps representing survey results from 26 service provider organizations about the categories they most frequently support, and five in-depth profiles of organizations supporting schools and districts.

FRAMEWORK FOR CATEGORIZING SERVICE PROVIDERS

The framework illustrates a set of essential questions that are typically asked during the process of school redesign, as well as a collection of elements that schools and districts are commonly looking to transform. The framework can help educators, administrators and district leaders think about which questions they can ask to drive their redesign; it can guide them in recognizing which aspects of their model might require outside support; and it can support a school or district in finding the right type of assistance by identifying the area of expertise a service provider has.

MARKET MAPS

Our market maps aim to give the reader a sense of how 26 service providers align with the categories in the framework we’ve created. Through a survey, they identified the five categories that best represent the bulk of their work, the specific content expertise they have and the level of organizations they most often support. These market maps are designed to give educators a starting point when identifying service providers that can best strengthen their new models and ideas.

ORGANIZATION PROFILES

As part of our research, we identified five unique and well-known organizations supporting schools and districts in multiple categories on the framework and generated in-depth profiles on each of them. The profiles were written after extensive research and multiple phone interviews with employees from each organization. With these profiles, we hope to give educators and administrators an inside look at the type of services some organizations provide in order to support the process of school redesign.
In March 2016, EdSurge began investigating the industry of technical assistance providers (often referred to as service providers, consultants or school partners). These experts perform a diverse range of work supporting schools, districts and sometimes even states through transformation. We began by interviewing educators, school redesign catalyst organizations and funders to better understand the process of redesign and the ways in which service providers were best positioned to assist schools.

As we got deeper into our research and began speaking with the service providers themselves, we realized that just as schools struggle to understand who they can turn to for help with their redesign, service providers also struggled to find ways to better define the assistance they offer. Part of the challenge is rooted in the need for a common language describing the types of support schools need as they go through redesign.

As a first step, we built a framework to categorize the elements of a school model that educators, administrators and district leaders consider when going through a redesign. The framework consists of 19 categories: vision; assessing readiness; school culture; pedagogy & curriculum; student & teacher experience; learning environment; scheduling & timing; infrastructure; edtech selection; budget & financial planning; human capital; policy; professional learning; communications; implementation support; change management; reflection & iteration; and sharing to grow a community of practice.

The categories in the framework support specific questions that practitioners are asking. To clarify how the categories relate, and to build a language that speaks to both service providers and practitioners, we created a series of essential questions.

- Why do we want to change teaching and learning?
- What would these changes look like in practice?
- What resources do we need to make this happen?
- How do we prepare and involve our school community (staff, students and families) in the redesign?
- How do we implement these changes?
- How do we scale and improve?

At the heart of school transformation on any scale is determining why a change is necessary. Each school has a unique community, culture and context. We have found that it is critical to drive change from a place that is deeply connected to the individual community.
Framework — (cont)

**WHY**
Do we want to change teaching and learning?

**WHAT**
- What would these changes look like in practice?
- What resources do we need to make this happen?

**HOW**
- How do we prepare our community for redesign?
- How do we implement these changes?
- How do we scale and improve?
- How do we prepare our community for redesign?

**WHAT**
- Why do we want to change teaching and learning?
- What would these changes look like in practice?
- What resources do we need to make this happen?
## Framework — (cont)

### DEFINITIONS

<table>
<thead>
<tr>
<th>VISION</th>
<th>Mapping out the work through design thinking and implementation.</th>
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<tbody>
<tr>
<td>ASSESSING READINESS</td>
<td>Assessing leader and teacher readiness, and assessing the current state of human capital, infrastructure, and edtech tools in a school or district.</td>
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<tr>
<td>SCHOOL CULTURE</td>
<td>Supporting a school or district in establishing a strong school culture including values, beliefs, relationships, and priorities.</td>
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<tr>
<td>PEDAGOGY &amp; CURRICULUM</td>
<td>Defining the instructional method and practice for teaching and supporting the development of curricular assets that complement that method.</td>
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<tr>
<td>DATA &amp; ASSESSMENT</td>
<td>Assisting a school or district in designing, managing, and analyzing assessment in a way that helps inform instruction.</td>
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<tr>
<td>STUDENT &amp; TEACHER EXPERIENCE</td>
<td>Designing the interactions between students and the learning experience, and planning the processes for teachers to support that experience.</td>
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<tr>
<td>LEARNING ENVIRONMENT</td>
<td>Helping schools and districts think outside the box when approaching space (where the learning happens, what the learning space looks like).</td>
</tr>
<tr>
<td>SCHEDULING &amp; TIMING</td>
<td>Helping schools and districts think outside the box when approaching flexibility of time, scheduling and figuring out when learning happens.</td>
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<tr>
<td>INFRASTRUCTURE</td>
<td>Providing support for hardware selection and management and/or assistance with improving connectivity &amp; long-term planning for bandwidth capacity.</td>
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<tr>
<td>EDTECH SELECTION</td>
<td>Offering assistance in selecting software and digital content. This can include support for technology pilots.</td>
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<tr>
<td>BUDGET &amp; FINANCIAL PLANNING</td>
<td>Figuring out how schools and districts can pay for everything related to the redesign such as infrastructure, devices, and human capital. This also supports the procurement process and purchasing.</td>
</tr>
<tr>
<td>HUMAN CAPITAL</td>
<td>Identifying who the school or district already has on hand that can contribute to the redesign, and who they need to bring onboard.</td>
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<tr>
<td>POLICY</td>
<td>Identifying and creating a plan to influence state or district policies that must be shifted to support, scale and sustain new models.</td>
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<tr>
<td>PROFESSIONAL LEARNING</td>
<td>Providing professional learning opportunities related to school redesign for school leaders and teachers. This can be coaching, training in edtech, or professional development around specific areas the support the redesign.</td>
</tr>
<tr>
<td>COMMUNICATIONS</td>
<td>Communicating ideas and plans for the redesign with stakeholders such as staff, students, and families.</td>
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<tr>
<td>IMPLEMENTATION SUPPORT</td>
<td>Offering hand-in-hand support during the implementation of the change.</td>
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<tr>
<td>CHANGE MANAGEMENT</td>
<td>Coming up with a vision and working on a plan to smoothly implement, scale, and sustain the changes that will be made.</td>
</tr>
<tr>
<td>REFLECTION &amp; ITERATION</td>
<td>Reflecting on all of the work that has taken place (including planning and implementation, PD, and the resources used throughout the redesign) and iterating along the way to make sure that the school or district is changing and improving.</td>
</tr>
<tr>
<td>SHARING TO GROW A COMMUNITY OF PRACTICE</td>
<td>Telling stories about what works and what doesn’t work so that other schools and districts don’t need to reinvent the wheel.</td>
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</tbody>
</table>
Framework — (cont)

ESSENTIAL QUESTIONS

<table>
<thead>
<tr>
<th>Why do we want to change teaching and learning?</th>
<th>VISION</th>
<th>ASSESSING READINESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What would these changes look like in practice?</td>
<td>SCHOOL CULTURE</td>
<td>PEDAGOGY &amp; CURRICULUM</td>
</tr>
<tr>
<td>What are the resources we need to make this happen?</td>
<td>INFRASTRUCTURE</td>
<td>EDTECH SELECTION</td>
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<tr>
<td>How do we prepare and involve our school community in the redesign?</td>
<td>PROFESSIONAL LEARNING</td>
<td>COMMUNICATIONS</td>
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<td>How do we implement these changes?</td>
<td>IMPLEMENTATION SUPPORT</td>
<td>CHANGE MANAGEMENT</td>
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<td>How do we scale and improve?</td>
<td>REFLECTION &amp; ITERATION</td>
<td>SHARING TO GROW A COMMUNITY OF PRACTICE</td>
</tr>
</tbody>
</table>
Maps

As we were building the framework, we simultaneously created a survey and sent it to a list of 26 service providers to gain insight into their work. To share how these providers align with our framework categories, we have compiled the data into three market maps. The first market map includes all of the data and shares how each organization fits into the framework. The second market map illustrates each organization’s specialty content area, including: blended learning; project-based learning; competency-based learning; maker education; STEAM; ELA; and math. The final market map features the level at which each organization works: individual school, charter management organization, districts, regional educational service agencies and state level agencies.
### MARKET MAP 1

<table>
<thead>
<tr>
<th>WHY</th>
<th>WHAT</th>
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<td><strong>Vision</strong></td>
<td><strong>Assessing Readiness</strong></td>
<td><strong>School Culture</strong></td>
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<td><strong>Data &amp; Assessment</strong></td>
<td><strong>Pedagogy &amp; Curriculum</strong></td>
<td><strong>Professional Learning</strong></td>
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<td><strong>Student &amp; Teacher Alignment</strong></td>
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<td><strong>Human Capital</strong></td>
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<td><strong>Reflection &amp; Iteration</strong></td>
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*Organizations listed in the table.*

- 2 Revolutions
- Afton Partners
- ARC Impact Solutions
- CA Group
- Center for Collaborative Edu.
- Cross & Joffus
- Dellicker Strategies
- DLR Group
- DMC District Mgmt. Council
- Education Elements
- Education First
- ExpandEDSchools
- Generation Schools Network
- The Great Schools Partnership
- Highlander Institute
- Ideo
- KnowledgeWorks
- Learning Forward
- Mastery Design Collaborative
- McRel International
- Parthenon Group
- PowerMyLearning
- Public Impact
- Ready to Blend
- Springpoint
- Teachers 21
- Teton Science Schools
- TNP
- UPD Consulting
### MARKET MAP 2

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### MARKET MAP 3

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<th>LEVELS</th>
<th>Individual Schools</th>
<th>Districts</th>
<th>Charter Management Organizations</th>
<th>Regional Education Service Agencies</th>
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Organization Profiles

After compiling the list of service provider organizations, we generated a set of criteria to help us pick out five to focus on for deep profiles. The five organizations selected consult as a primary function, work directly with schools and districts, and span multiple categories on the framework. Each profile was written after weeks of research and multiple phone interviews with leaders from each organization.

After speaking with the five profiled organizations, it became clear that one of the major distinguishing factors in redesign work is the level and scale at which it is happening. When we talk about school redesign it doesn’t always mean rebuilding a school from the ground up. In many cases it means piloting something small in one or a few classrooms. But two of the profiled organizations support states in redesigning their schools, so sometimes the work happens at a much higher level and trickles down to impact many classrooms in a region.

These five profiles aim to capture the types of organizations that support redesign, the diverse approaches they take, and what administrators can expect when working with these experts.

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2Revolutions

An education design lab that helps schools, districts, and states design, launch and support Future of Learning models.

WHO THEY WORK WITH

- Individual Schools
- Districts
- Charter Management Organizations
- Regional Educational Service Agencies
- State Level Agencies

FRAMEWORK CATEGORIES

VISION

PEDAGOGY & CURRICULUM

DATA & ASSESSMENT

PROFESSIONAL LEARNING

IMPLEMENTATION SUPPORT

CHANGE MANAGEMENT

THE ORGANIZATION

FOUNDING STORY

In 2008, Adam Rubin and Todd Kern co-founded 2Revolutions, or 2Rev, because they believed the field of education was siloed, preventing innovation at scale. They created 2Rev as an education design lab—a place where designs for innovative learning models could be developed and tested.

From 2008 - 2011, the company worked on projects spanning early childhood, grades K-12, higher education and the workforce, while simultaneously crystallizing its philosophy. In 2011, Rubin and Kern co-authored and released, Designing The Future of Learning, a white paper focused on the transformation taking place in the educational system. In the report, they share the 2Revolutions framework and describe six trends in education: personalization, growth in technology, more balance between formal and informal learning experiences, advances in learning sciences, shifting policies and increased economic pressures on the traditional model for instruction. The release of the paper, which Rubin and Kern refer to as their thesis, launched their next phase of work and has been a driving force behind every project since then.

From 2011 - 2015, 2Rev shifted their work to focus on assisting schools, districts and states with building future of learning models and helping those models succeed and scale. The company offered three main types of support that align with its thesis: school design, school model implementation support, and systems design and implementation. Since 2012, all of 2Rev’s offerings provide a blended experience, including face-to-face sessions as well as online learning opportunities.
2Revolutions — (cont)

In 2015, after working with other tech partners, 2Revolutions decided to build its own social learning platform from scratch. The platform, InspirED, was released in March 2016 and as of summer 2016 it has 28,000 users, some of whom have worked in states or districts that have received design support from 2Revolutions. The platform’s goal is to build connections between educators, allowing them to create and share resources that can help transform learning. The company now aims to provide direct support at the state and district level, while also reaching an increasing number of educators through its new platform.

In addition to the platform, the company has also brought together 75 experts to form a group which they call the “talent cloud.” The individuals in the talent cloud include teachers, administrators and CEOs; 2Rev taps their expertise for specific projects or portions of projects when needed.

Rubin brings experience from both nonprofit and for-profit sectors. He began his career teaching in Oakland, California and Cape Town, South Africa. He was the founding Executive Director of Tikkun Cape Town, a nonprofit focused on educational reform in South Africa, as well as the Director of Policy and Research at New Visions for Public Schools. He has also held a variety of other management positions in education and community development.

Kern has 25 years of education experience spanning government, academia, research and operations, at the federal, state and local levels. He worked in senior leadership at New Leaders for New Schools and at KnowledgeQuest Ventures, an educational consulting firm. He has also taught educational policy at Teachers College, Columbia University.

WORK HISTORY

2Revolutions partners with individual schools, districts, states, foundations and organizations that are interested in building future of learning models.

The company has worked in more than 30 states, with its deepest work in Washington DC, New Hampshire, Colorado, Dallas and Chicago. In fall 2016, 2Rev will launch a regional initiative in Kansas City in partnership with the Kauffman Foundation. To date, 2Rev has lead whole school design with more than 60 school teams, and has partnered deeply in over 25 districts.

FUNDING AND BUSINESS MODEL

Rubin and Kern self-funded 2Revolutions; since its launch in 2008, the for-profit company has not taken any capital. As of summer 2016, the founders are talking to philanthropic organizations about accelerating their technology development to enable free and open
2Revolutions — (cont)

access and deeper free and open content for the InspireEd platform.

2Rev operates on a fee-for-service model. Of the company’s total revenue, about 70% is from federal, state and local dollars including title money, local grants and general operating funds. About 30% comes from partnerships with philanthropic organizations such as The William and Flora Hewlett Foundation, the Bill and Melinda Gates Foundation, the Carnegie Foundation, and the City Bridge Foundation.

The InspirED platform is used by 2Revolutions to support its work and is also available to schools, districts and states that are not working with the company. The platform was initially operating on a seat-based subscription model, but the company recently transitioned to a freemium model—an array of content is already available, with more coming online all the time.

In the new model, most content is free and open. A second option allows users to buy subscriptions for more functionality, collaboration and content. Districts, states, initiatives and organizations pay for the platform, and in turn get increased access to features such as private groups, premium courses, the ability to create up to three of their own courses, and training and support.

A third, premium option gives users unlimited access to all features including premium courses and the ability to create as many original courses as they want. 2Rev has six or seven premium partners that have these custom branded platforms with unlimited seats. For example, the New Hampshire Department of Education can setup unlimited groups for professional learning, access all courses and build as many of their own as they want. As of summer 2016, 11,000 of New Hampshire’s 16,000 K-12 teachers have leveraged the system.

When 2Revolutions builds the budget for a project, it includes the cost for the core 2Rev team as well as a reserved amount to pay for any experts from the company’s talent cloud that may work on the project to compliment core teams.

THE WORK
WHO THEY WORK WITH

2Revolutions works with individual schools and districts on projects of varied scale that span a broad range of challenges. The company is most excited about opportunities to collaborate with schools or districts over a long period of time so that the team can develop proof points for new models that work at the school, district and state level.

WHAT THEY DO AND HOW THEY DO IT

The goal of the company is to support the education industry in designing the future of
learning as defined in its **white paper**; it accomplishes this in three ways. The company helps design new schools and redesign existing schools; offers implementation support for new models; and leads systems design and implementation, which is typically at the state, district or CMO level.

The company uses a blended approach pairing in-person activities with the use of the **InspirED platform** to help practitioners transform their practice. The platform was designed to help teachers and school leaders communicate individually and in groups, to access content to inspire them around what is possible for their transformation and to share resources that can support the design and transformation processes.

2Rev has worked in 30 states and currently has a team of 13 employees across seven states. To support its work, 2Rev leverages its talent cloud, which includes about 75 experts and 10 partner organizations. It brings these independent contractors in at the moment they’re needed. For example, if the company is supporting a school that needs a STEM expert or someone with an extensive background in performance assessments for ELA, 2Rev will reach out to the talent cloud to find that person.
The company works with each partner to identify goals, design possible solutions and test out those solutions by building and implementing a short cycle prototype. 2Rev’s work falls into four categories: Discover, Map, Build and Implement. The categories of work are not linear; all partners participate in some degree of map work.

■ **Discover:** The goal of the discover category is to catalyze a new way to think about the future of learning. This work can support schools, districts, systems and organizations. It includes a half day or full day design session, during which 2Revolutions engages participants with design activities and showcases what is happening nationally and internationally in education. It is the most lightweight and inexpensive of 2Rev’s offerings, and focuses on raising awareness and exposing a broad array of participants to the realm of what’s possible around education innovation. Although it can stand alone, it typically kicks off the map or build phase of a project.

■ **Map:** The map category is the most variable, depending on the partner’s needs. The goal is to help the client get clear on its vision of the future of learning, but that process can take a lot of forms and can happen on a variety of levels such as school, district, state or national. Map work is custom and happens throughout the build and implement stages. This work can take months or years depending on whether it is happening at the district, state or national level.

When engaging in map work, 2Revolutions works with the leadership team from a district, state or foundation. Oftentimes the leadership team wants one school as a proof point or is looking to spread an initiative across a region.

To help the leadership team get clarity, 2Rev uses a strategic planning process that helps lay out objectives and make a plan for transformation. The process also helps identify barriers such as readiness, public policy and infrastructure as well as figure out potential solutions. Specifically, the company works with the leadership team to understand what assets it has internally, what support 2Revolutions can offer and what other industry expertise might be available. The driving force behind this phase of work is supporting the team members to tell their story of the future of learning and identify what factors are in their way as they realize their vision of the future.

■ **Build:** During the build phase, which is typically three- to six-months, 2Revolutions works with teachers and school leaders to design the future of learning guided by the work done in the map phase. The work is often co-lead with a partner such as state leadership, district leadership or a local foundation. The design can be focused on a classroom, a full school design or redesign, a district-wide plan, a shift in state policy or a national initiative. Most frequently, the company either builds a design for a whole school transformation or a design for a short-cycle prototype.

**Whole School Transformation:** Whole school transformation can apply to building a
new school from scratch or redesigning an existing school. For this type of project, a school goes through a four- to six-month design process with 2Revolutions; this typically includes five or six in-person design sessions and more communication on the InspirED platform. During these months, the school explores and builds a design for a new school model and begins to test it out.

Short-Cycle Prototype: For a short-cycle prototype project the timeline is usually three- to six-months, with a preliminary course on the InspirED platform before the project officially kicks off. It includes three in-person design sessions that feature a series of design activities. The goal of a short-cycle prototype is not to transform an entire school, but rather to identify a specific topic such as standards-based grading, student agency or assessment and to test out making a change to the typical model. However, these projects have the potential to scale and eventually contribute to whole school transformation. Usually this work begins with a school leader and a group of teachers that are ready. When it is successful, the work expands.

In the first session, participants build a prototype and then go back to their school to test it out. After it has been tested, they come back to the table with 2Rev and at the second session they present their findings and get feedback on how to dive deeper and make iterations. After further testing, they participate in the third session, with a focus on figuring out how to scale the project’s successes. Often a school will go through multiple cycles and 2Rev will provide scaffolded support. For example, 2Rev might lead the first cycle, co-facilitate the second and let teachers and school leaders take the front seat in the third.

Implement: A few years ago, 2Revolutions added this fourth category at the encouragement of existing partners. The work typically lasts at least a year and is deeply inspired by the work in map and build. It is for school design teams that are ready to put their designs into action so they can test the model and scale what works. Implementation support can take the shape of coaching for school leaders or teachers.

Implementation support looks different at each school, because the needs vary. Most commonly, the company offers leadership coaching as well as support around a topical need specific to that school. In Washington DC, 2Revolutions is supporting a personalized learning initiative that is focused on competency-based learning; to assist with implementation, the company is coaching staff and setting up a competency-based professional learning program. In Dallas, 2Rev is supporting five schools on implementation, with a focus on project-based learning and is coaching teachers on building performance assessments.

**TYPES OF SUPPORT**

2Revolutions provides planning, design and implementation support at the school,
district and state level. All of 2Rev’s work is focused on building future of learning models, designed around an aspirational set of principles and characteristics. The result are models that are learner-driven, personalized, competency-based, tech-enabled, cost effective, safe and healthy, and fair and equitable. To do this work, the company:

- Facilitates workshops on a variety of topics.
- Meets with state, district and school leaders to map out the road to a new school model.
- Offers implementation support, typically coaching, for educators that are putting a new model into action, as well as deep, topical PD.
- Brings together professionals with a wide range of expertise and contracts them to work on projects where they can provide guidance on an aspect of school model redesign.
- Built the InspirED platform to support their own work and the work of others that are transforming school models.

A SPECIFIC ENGAGEMENT

From July 2013 through the present, 2Revolutions has worked with the Colorado Department of Education (CDE) and the Colorado Education Initiative (CEI) to help the state move towards a next generation learning model focused on student-centered learning across its districts. The company supported CDE and CEI to explore possible strategies for beginning this transformation and continued to provide assistance as districts and schools started experimenting with changes and eventually engaged in whole school redesigns. It also worked at the district level to ensure that the conditions necessary for the changes were in place.
Discover: The purpose of the discover phase of this project was to help leaders and educators from the Colorado Department of Education and the Colorado Education Initiative develop an understanding of competency-based learning. Participants took an online course in the InspirEd platform to prepare for a virtual symposium designed and facilitated by 2Rev. The symposium featured asynchronous content that could be accessed at any time, and a virtual session including stories shared by practitioners from across the country with experience in competency-based education. Participants could ask questions and engage with these practitioners. From 2014 - 2016 there have been six or seven cohorts that have taken the online course and two cohorts that have taken the symposium, with the third planned for the fall.

Map: During the map phase, 2Rev worked with the Colorado Department of Education and the Colorado Education Initiative to develop a clear picture of how they wanted to transform education. Part of the work was supporting state and district leaders in developing a strategy for how to make the changes, and part of the work was helping them tell their story.

Colorado wanted to build an ecosystem for innovation so that schools and districts throughout the state could participate in the transformation based on their interest and readiness. From 2013 - 2016, 2Rev helped the CDE and the CEI build a plan for the transformation. The plan included developing a broader definition of student success, experimenting with short-cycle prototypes and working toward whole school redesign. Colorado eventually adopted the InspirED platform, calling it Colorado ConnectEd.

Build: From 2013 - 2016, 12 Colorado districts and about 150 educators participated in short-cycle prototypes around two topics: blended learning and rethinking time and talent. These prototypes were designed to prepare schools for the next steps of redesign, which were larger in scale and involved whole school redesign. There were three school districts that emerged from the prototype process as exceedingly ready for this type of work: Adams County School District 50, Colorado Springs School District 11 and Thompson School District.

During that timeframe, 2Rev was working with the CDE and the CEI to help shape and manage the NGLC initiative in Colorado. Two schools from each of these three districts received funding and were chosen to go through the seven-month NGLC process, which was designed by 2Rev. Over the span of seven months, the company ran seven face-to-face sessions and multiple courses on the InspirEd platform. These explored the future of learning broadly, and provided educators and administrators with a deeper understanding of complex aspects of future of learning models such as blended learning, the role of the educator and rethinking time and space. Throughout the entire process, each school team had their own coach from 2Rev.
After the six schools went through this seven-month process, 2Rev continued the short-cycle prototyping with 15 other schools across the three districts to improve their readiness for transformation. These prototypes were focused on two topics: standards-based grading and student-centered learning.

**Implementation:** As of summer 2016, 2Rev is getting ready to begin working with the CDE and the CEI on the implementation phase. The company has plans to set up a leadership development and implementation support network. At first, this network will support 15 leaders across the state, with a goal of growing the network to cover a variety of districts from urban, rural and suburban Colorado districts. This work is supported by the CDE and in partnership with and supported by the Colorado-based Gates Family Foundation.

**COLLABORATORS AND COMMUNITY OF PRACTICE**

When supporting schools, districts and state leadership, 2Revolutions works with many organizations and individuals. Some of these come from the company’s talent cloud. In other situations, the company might partner or collaborate with an organization or individual that will strengthen the work for a specific project. 2Revolutions has worked and is in process of deepening partnerships with The Buck Institute, Afton Partners, iNACOL, NGLC, Center for Collaborative Education and the Center for Innovation Education (CIE).

Because 2Rev works at the school, district and state level, the scope of each project varies. The company sees some similarities in the design work happening at Education Elements, Mastery Design Collaborative, Transcend Education, and CA Group. It also notes parallels with Great Schools Partnership around professional development and Parthenon Group and Education First for management consulting.

Editor’s Note: EdSurge has collaborated on a research project with 2Revs and the New Hampshire Department of Education to help identify technology that explicitly supports a competency based learning model.
CA Group

A consulting firm focused on supporting and creating strategic partnerships that support school transformation with a focus on personalized learning.

WHO THEY WORK WITH

- Individual Schools
- Districts
- Charter Management Organizations
- Regional Educational Service Agencies
- State Level Agencies

THE ORGANIZATION

FOUNDING STORY

CA Group is a consulting firm dedicated to improving education for students in grades K-12. The firm works with schools and districts in addition to businesses, foundations and nonprofit organizations to support school design and replication of successful school models. CA Group manages large scale systemic change in schools across a particular region and also supports districts, networks and schools through the process of school model redesign. In both types of work, CA Group provides assistance in design as well as implementation and fosters relationships with organizations that can help with major school transformations and rethinking aspects of the model like time, space and schedule.

For the large scale systemic work, the company typically takes a cohort of schools through a variety of workshops to support redesign on a larger scale. As part of this process, CA Group often begins with a “personalized learning scan,” in which the team looks at what resources are already in place on a district, city, and state level to support personalized learning. This can include investigating education policies at the district or state level or identifying which technical assistance providers might be able to support the initiative.

Founder and Chief Executive Officer Cat Alexander brings a diverse set of experiences to her firm. While attending business school in Chicago, she interned at Chicago Public Schools when Arne Duncan was superintendent; this ignited her interest in charter schools and school redesign. She initially founded CA Group in 2006, then went on to serve as the Chief Operating Officer of Rocketship Education, and program officer at the Michael and Susan Dell Foundation.
CA Group — (cont)

In 2013 she returned to CA Group full-time and launched its personalized learning practice. The company’s first large contract was helping Stacey Childress—then the Deputy Director of the Gates Foundation—and her team design and launch the Next Generation Learning Challenges (NGLC) and the Next Generation Systems Initiatives.

WORK HISTORY

CA Group works with public districts, charter networks, individual schools, nonprofit organizations, foundations and corporations to support school model redesign around personalized learning.

Since 2013, CA Group has worked on ecosystem design in New Orleans and launched the statewide Raising Blended Learners Initiative in Texas, which is funded by Raise Your Hand Texas. The company did ecosystem design and implementation work with 15 charter schools in New Orleans and consulted one-on-one with ten school design teams in Chicago.

It is now working intensely with 18 districts and two charter networks supporting design and implementation in Texas.

Additionally, the team has completed what they refer to as “personalized learning scans” in eight states: California, Colorado, Massachusetts, Florida, New Jersey, New York, Tennessee, Illinois and Texas. During the scans, the team is looking at whether conditions necessary to support personalized learning in a region are in place. These scans are often the first step in ecosystem design.

FUNDING AND BUSINESS MODEL

Cat Alexander self-funded CA Group. The company has hourly consulting rates, and does not fundraise. The project budget varies greatly depending on the scope of the work; all work is funded by foundations, districts, charter networks or corporations. The personalized learning scans are funded by foundations. Ecosystem design work is typically funded by the regional partner, for example, New Schools for New Orleans in the New Orleans NGLC region. In Texas, work is funded by the nonprofit organization Raise Your Hand Texas. Districts and charter networks sometimes pay for CA Group’s services with professional development funding or grants.

THE WORK

WHO THEY WORK WITH

CA Group works with public districts, charter networks, individual schools, nonprofit organizations, foundations and corporations. The company’s ideal educational partner
CA Group — (cont)

is a school, district or network that is committed to putting the learner at the center of the learning experience, and is willing and able to include a vertical team of its own staff members in the design, implementation and scaling process. CA Group works best when school leaders and teachers have a good degree of autonomy.

TYPES OF SUPPORT

CA Group provides a variety of services spanning two major areas: managing large scale transformations in a region, and assisting schools, districts and networks through the process of school model redesign. The most common types of assistance CA Group provides are:

■ Managing large scale systemic change at the state or regional level.
■ Facilitating workshops and learning experiences led by experts in various areas such as budgeting, technology and curriculum.
■ Providing operational support for school and district leadership during the process of school model redesign.
■ Leading personalized learning scans to explore what is happening in a specific area of interest across the country.
■ Supporting school design and replication by identifying goals, holding strategic planning meetings, supporting pilot implementation and helping scale what is working.
■ Building relationships with organizations that can accelerate and strengthen the redesign.

WHAT THEY DO AND HOW THEY DO IT

CA Group works on a variety of projects but most of them fall into two categories: systemic change and personalized learning pilots. Sometimes the company works in a particular region to manage a large-scale systemic change across multiple districts and charter networks. The company refers to these large-scale projects as “ecosystem design work.” In other cases, Alexander’s team assists schools, districts and networks through the process of school model redesign by designing, implementing and scaling personalized learning pilots.

Regardless of scale, CA Group is heavily involved in all design and implementation work. The company helps build relationships with other organizations that can provide expertise in various areas throughout the process. CA Group has eight employees with three implementation managers (all former teachers), three ecosystem managers, and two general consultants.
CA Group’s goal is to personalize the learning experience and empower teachers to have the autonomy to rethink elements of the instructional model that impact learning, such as time, space, schedule and resources. The company’s approach highlights blended learning as the way to personalize learning at scale. Typically, CA Group works with a school, district, network or ecosystem for 18 - 24 months.

Ecosystem Design
During ecosystem design projects, the company works at the city or state level to build a regional community of practice around personalized learning and school redesign.

As part of the ecosystem design work, the company also supports foundations interested in investing in personalized learning schools. Sometimes that happens through what CA Group refers to as a personalized learning scan. These scans are often the first step in ecosystem design.

After the scans are complete, CA group works with the project funder to identify goals for the personalized learning work. The company designs a path for support while both exposing the schools to and piloting personalized learning. Support can include workshops, office hours, bringing in external experts or designing a grant competition.

School, District or Network Projects
Typically, CA Group works with a vertical design team including administrators, educators, families and, when possible, students. When working with a school, district or network, CA Group thinks of the project as having four phases: exposure, pilot design, pilot implementation and scaling. Usually, the exposure and design phases span the course of a year and the implementation and scaling happens throughout the second year.

Exposure: This phase is all about developing an understanding and a common language around personalized learning. CA Group kicks off the process with a two-day workshop. During the workshop, the design team works together to identify a problem statement that helps clarify the challenge the community is trying to address by implementing personalized learning. CA Group encourages the team to look at academic as well as non-academic issues.

A series of workshops exposes participants to theory, research and instructional models related to personalized learning. In many instances, CA Group will bring in experienced school operators from other regions to share about their models.

By the end of the first phase, the school or district design team should have a problem statement. The implementation manager works closely with the team to craft a student experience and a set of goals that align with it.
Pilot Design: In this phase, the team walks away with a design for a pilot that will allow staff at the school to explore what personalized learning can look like in their community. The phase begins with a workshop exploring what a pilot can look like and how to plan and launch a pilot that uses data to drive change. The pilot can be any size, ranging from one portion of the day or one classroom to one embracing a full school or district; however, all pilots must be aligned to the problem statement and the goals that help participating staff measure its impact.

In order to design the goals and pilot, the implementation manager supports the design team in defining a teacher and student experience. This takes the form of a visionary narrative that illustrates a day in the life of a teacher and learner. Support includes workshops, templates, school visits and research on other models.

Once the pilot design is complete, CA Group develops a multi-year budget for the project, including the company’s own work as well as that of external experts that will offer support. The leadership team works with CA Group to refine the budget.

Pilot Implementation: Typically, each school or district has an implementation manager that visits the school during the pilot to provide support. During this phase, which usually happens in year two, the implementation manager works with teams on a weekly or bi-weekly basis. This work is a combination of virtual and on-site communication.

Scaling: When the pilot is coming to a close, the implementation manager works with the design team to evaluate the impact of the pilot and to begin coming up with a plan to scale successful pilots across more schools. Cat Alexander frequently works with school and district leadership to provide support for systemic redesign with a focus on the operational changes that are necessary for scaling a pilot.

A SPECIFIC ENGAGEMENT

In June 2015, Raise Your Hand Texas, an organization that invests in research and programs that impact public education in Texas, funded the Raising Blended Learners Initiative. The initiative was designed to build exemplars for blended learning in diverse schools and districts across the state of Texas. The work is deeply rooted in Heather Staker and Michael B. Horn’s book, Blended: Using Disruptive Innovation to Improve Schools. This project exemplifies both ecosystem and school design work.

Over the course of nine months, CA Group supported Raise Your Hand Texas and Heather Staker to develop a program in which district and charter schools across the state could apply to receive funding and support from technical assistance providers in order to design, pilot and implement blended learning. To begin the project, CA Group evaluated personalized learning in Texas. Then it managed the school and district selection process,
and recruited service providers to assist with various elements of support. Additionally, CA Group supported the school and district teams directly with program design and implementation.

The core of CA Group’s role was aimed at giving districts exposure, designing pilots, implementing those pilots and identifying ways to scale. Here’s how they did it:

**Exposure**

Seventy five teams representing a diverse set of schools and districts from across the state were chosen to attend a series of workshops in fall 2015; CA Group helped facilitate these workshops. Of those teams, 67 submitted blended learning business plans and ten were selected to refine their plans.

**Pilot Design**

CA Group worked with these teams as they were refining their plans. In April 2016, five of those teams were chosen to each receive $500K and technical support over the next three years to pilot and implement their blended learning plans. The five schools are: Birdville ISD, Cisco ISD, KIPP Houston, Pasadena ISD and Point Isabel ISD.

**Pilot Implementation**

As of fall 2016, CA Group will support these five school teams for three years. One of the company’s implementation managers is working with teachers at each of the five schools to refine goals, design a student experience and build a pilot implementation plan. This work takes the form of weekly meetings and design workshops.

**Scaling**

The pilot implementation phase will take place throughout the 2016 - 2017 school year. CA Group will review data from the pilot to determine if and how the teams will scale their pilots. Scaling could mean spreading the pilots to more subject areas, more grade levels or working across additional schools. If the teams scale their pilots, CA Group plans to support that phase of work.

**COLLABORATORS AND COMMUNITY OF PRACTICE**

The company helps build relationships between educational institutions and organizations that can support transformation. In order to do this, Alexander’s team frequently brings in external expertise in areas such as finance, professional development training, technology selection, and blended learning. She considers 2Revolutions, Mastery Design Collaborative, Transcend Education, Education Elements, Ready to Blend, EDUCAUSE,
CA Group — (cont)

School Retool, TNTP and Afton Partners in CA Group’s community of practice.

Editor’s Note: EdSurge’s Concierge team has been contracted to support tech selection professional development activities for CA Group’s Raise Your Hand Texas project.
Education Elements
Guides districts in creating environments that personalize learning for every student.

WHO THEY WORK WITH
- Districts

THE ORGANIZATION

FOUNDING STORY

Education Elements provides support for schools and districts as they transform their school models to personalize learning. The company got its start in late 2010, spurred by founder Anthony Kim’s work with KIPP Empower, an elementary charter school in Los Angeles. Kim had previously been an Executive Vice President at Edison Learning, a for-profit education management organization. Prior to that, he founded Provost Systems an online learning platform acquired by Edison Learning in 2008.

Through a 2010 collaboration with Gisele Huff from the Jacquelin Hume Foundation and Michael B. Horn from the Clayton Christensen Institute, Kim had the opportunity to help design KIPP Empower’s instructional model. During his work at KIPP Empower, Kim realized there was a need for providing a scalable way to support schools and districts with blended learning. He founded Education Elements to meet that need.

Since its founding, the company has developed a two-part offering for schools and districts: consulting services to help envision, design and create instructional models and professional learning for blended and personalized learning programs, and a technology platform that helps schools transition to blended learning. The platform, now called “Highlight”, supports teachers and schools as they develop personalized learning environments by managing passwords, the sign-on process and data analysis. Education Elements is currently building Touchpoint, a new tool that will support administrators—both those working independently and those working with Education Elements consultants—as they redesign their schools and districts to embrace personalized learning. As of spring 2016, the...
company has supported 100 districts nationally, representing 300 schools and 300K students.

**WORK HISTORY**

Over the course of the 2011-2012 school year, Education Elements began consulting with 11 charter and private schools, including Alliance College-Ready Public Schools, Aspire Public Schools and Cornerstone Schools. The following year, the company began to dip its toes into the public school arena, working with several district public schools. Today, Education Elements has two consulting offices, in San Carlos, California and the District of Columbia, enabling it to serve districts across the country. As of spring 2016, the company has supported 100 districts nationally, representing 300 schools and 300K students.

**FUNDING AND BUSINESS MODEL**

In fall 2011, Education Elements raised $2.1 million in seed funding from Imagine K12, NewSchools Venture Fund and Tugboat Ventures. The company raised another $6.4 million Series A round led by Harmony Partners and Rethink Education in March 2012.

Education Elements currently uses a fee-for-service model with all the districts they support. Pricing varies by project depending on the type of work and the scope of the project.

**THE WORK**

**WHO THEY WORK WITH**

Education Elements typically works with district and school leaders to redesign school models in cohorts or across entire districts. The company is ideally looking to partner with districts looking to invest in personalized learning by engaging in a full scale transformation or with the potential to scale to multiple schools down the road.

**TYPES OF SUPPORT**

Education Elements provides support to schools and districts in multiple ways, including planning meetings, design activities and a variety of workshops. The main areas of support include:

- Helping schools and districts develop a vision, strategy, and roll out plan for personalized learning
- Assessing school readiness for a personal learning redesign
- Designing new instructional models that help teachers personalize learning for each student
Education Elements — (cont)

- Assisting schools in selecting appropriate and high quality digital content
- Providing support along the way as schools implement new models and tools

WHAT THEY DO AND HOW THEY DO IT

Anthony Kim likes to describe the Education Elements team as the “sherpas” of personalized learning. There are two questions that districts commonly bring to the company: “I bought all of these technology tools and my instruction hasn’t changed. What have I done wrong?” and “Can you help us understand what personalized learning means and can look like in our district?”

The length of each consulting engagement typically varies from a few months to three years. Ideally, the company works with district leadership for a minimum of 18 months. Some 95% of districts working with Education Elements last year are returning for ongoing support in the 2016 - 2017 school year. Typically, schools in their second or third year of engagement are focused on transitioning to capacity building, iterating, or digging deeper into a topic such as small group instruction—making sure the work will be able to continue after the consulting period comes to an end.

Education Elements’ approach to school model redesign has four phases:

- **Plan and Align:** The first phase is dedicated to project management. Education Elements’ consultants work with district leaders to align everyone around goals, timeline and roles. This phase is comprised of a series of four touch points and an on-site kickoff meeting. Before the meeting, Education Elements asks district leadership to fill out a questionnaire called the “Personalized Learning District Context Inventory.” The consultants use this information to become familiar with the district and its needs before the meeting, in which all stakeholders come together and create a project roadmap. Throughout the process of redesign, Education Elements has regular touch point with the district team and multiple meetings to revisit the work completed in this phase.

- **Foundations:** During the foundations phase, the company works with the district to solidify the initial vision for personalized learning in a few ways. First, there is the “All Hands Foundations Workshop,” where district and school staff come together for a half-day meeting to develop a common vocabulary around personalized learning and participate in a blended learning simulation. Next, the company completes a readiness assessment with the individual schools. During the assessment, consultants visit each participating school site for about two hours in order to build an understanding of the existing school culture, trends, strengths and areas for growth. This happens through speaking with teachers, students and school leadership and asking questions that align
SUPPORTING SCHOOLS TO TRANSFORM TEACHING AND LEARNING

August 2016

with Education Element’s personalized learning implementation framework, which is a central document used throughout the redesign.

The framework is a five-by-five square grid that includes many different elements that the company considers when building a personalized learning environment. These elements are categorized into five columns: strategy, design, curriculum & instruction, support and operations. The information gathered at each school site informs a rubric that is in turn used to evaluate each school’s readiness to change their model. At the end of this process, the company generates a District Readiness Report. This is shared on a call with the District Personalized Learning Council, typically made up of six to ten staff members including the superintendent, assistant superintendent, leaders in curriculum and technology, and principal and teacher representatives.

Finally, there is a two-day strategy session that includes the District Personalized Learning Council. The central goal of this session is to develop the rollout plan and to create expectations for the school redesign. Education Elements guides the staff
in using the personalized learning framework, helping the district build knowledge around what is happening on its home turf and in other regions in relation to each of the elements on the framework. This empowers council members to choose a focus area and create an action plan that brings their focus to life. Over the course of the two days, participants delve into three squares from the framework: Vision Alignment, Rollout Plan and Professional Learning Plan. Education Elements calls these the “gateway squares,” because every district must really delve into those three topics before moving on. By the end of the session, a Strategy Report reflects the district’s vision for personalized learning, the rollout and support plan, expectations, curriculum alignment and a first draft of how to measure success.

■ Design & Launch: The third phase is all about action. The Education Elements consultants work with each school’s leadership team to decide how to begin taking the school through the redesign process. This includes exposing teams to personalized learning models and guiding each school towards developing an instructional model that aligns to that school’s vision and the needs of its students. Launch refers to a two to four week period of time at the end of the phase, during which schools implement their models.

Education Elements has developed four key areas that support schools and districts in implementing personalized learning; the company refers to these elements as the “Core Four of Personalized Learning.” The Core Four are: Integrated Digital Content, Targeted Instruction, Student Reflection and Ownership and Data Driven Decisions. Some districts (but not all) use the Core Four when creating their vision of personalized learning. In these cases, the company’s consultants help the school staff identify one of the four areas of focus and take them through a series of strategy workshops every six to eight weeks throughout the redesign; they hold similar workshops with district teams.
During each workshop, Education Elements helps participants move their work forward by diving into one or two squares on the framework. One of the most critical workshops is the design workshop, which is conducted separately with both school and district teams. In this session, the staff members learn about design thinking and work together with Education Elements consultants to build a prototype of an instructional model that can personalize learning in each school. At the end of the phase, each school team launches its prototype.

**Support, Reflect and Iterate:** During the fourth and final phase, Education Elements helps the district and each school figure out how to sustain the work after the personalized learning model(s) have launched. To do this, the company engages both district and school teams through learning walks and reflect and iterate workshops. The learning walks are an opportunity for Education Elements to work with staff to observe practice, debrief and figure out next steps for supporting the work. The workshops are focused on sharing results from the learning walks and deciding how to tackle areas of need.

**A SPECIFIC ENGAGEMENT**

In May 2015, Education Elements worked with the Metropolitan School District of Warren Township, an urban Indianapolis school district with 16 schools and 11,000 students in grades PreK-12. Three years prior, the district had received $28.6M in Race to the Top funding and used it to purchase 1:1 Chromebooks. By 2015, Superintendent Dr. Dena Cushenberry hadn’t seen much change in instruction or student engagement. With one year of grant money left, the district hired Education Elements to help them use technology to promote individualized instruction and college readiness.

**Plan and Align**

The work began in May 2015 with a diagnostic readiness assessment. The ”Plan and Align” phase was complete before the end of the school year. During this phase, Education Elements helped Warren identify pockets of innovation throughout the district. District leaders worked with the company to uncover why some classrooms were experiencing change and leveraging technology, while others weren’t. They suspected it was because, initially, resources were focused on devices and digital content, not instructional models. They worked with Education Elements to develop clarity around the change they wanted to see, which they defined as an increase in academic growth for all learners, with a focus on college readiness.

**Foundations**

During summer 2015, Education Elements hosted a strategy session for the district
team. When the staff came back to school that fall, the workshops began. The district was broken up into three cohorts. Cohort One was comprised of five schools that demonstrated readiness and willingness to dive into the deep end and begin building a prototype of their model. Cohort Two included 11 schools that were very interested in making change, but wanted to see how the first five schools fared first. Cohort Three was a large high school with 3,000 students; it was separate from the other two cohorts because of its size. (The English department joined Cohort Two as a pilot for the rest of the high school).

The timeline was designed so that each cohort launched its work separately. Cohort One launched implementation of its instructional model in January 2016. Cohort Two started building a prototype of its model in spring 2015 and is set to launch in August 2016. Cohort Three will launch last.

**Design and Launch**

The design and launch phase varies by engagement and depends on how much autonomy is given to each school. In Warren, every school was able to create its own instructional model designed to meet its students’ needs. Each focuses in on one of the Core Four areas: Integrated Digital Content, Targeted Instruction, Student Reflection and Ownership and Data Driven Decisions.

One school in the district, Stonybrook Middle School, decided to focus on shifting whole group instruction to targeted small group instruction. The school team built a prototype of an instructional model that would support this effort, taking into account changes in schedule, space and the tools needed to create opportunities for small group learning. During the development of the model, the team came up with specific approaches that would facilitate small group instruction, including station rotation models and flexible learning environments.

**COLLABORATORS AND COMMUNITY OF PRACTICE**

The company sees 2Revolutions, The Alvo Institute, Highlander Institute and Mastery Design Collaborative in its community of practice, as well as catalyst groups such as LEAP Innovations and Citybridge Foundation.
The company has a variety of collaborators such as Patrick Jude Schuermann from Vanderbilt University, iNacol, the Clayton Christensen Institute, Competency Works, the Buck Institute for Education and Gartner. Additionally, it has relationships with many edtech product partners; these began when the Highlight platform was at the forefront of the company’s work. Today Education Elements maintains these partnerships and continues to develop new ones so it can continue to help schools find the right tools.
Mastery Design Collaborative

A nonprofit organization that provides school systems and leaders with support in redesigning school models that personalize learning for all students.

WHO THEY WORK WITH
- Individual Schools
- Districts
- Charter Management Organizations

THE ORGANIZATION

FOUNDING STORY

Mastery Design Collaborative (MDC) works with schools and districts that are focused on designing school models that personalize learning. The organization is dedicated to transforming existing schools rather than building and launching new ones. MDC offers support in three ways: through strategic planning, professional development for classroom teachers, and a program called Reimagine School Collaborative. The Reimagine School program brings together up to ten schools in a district represented by teams of four to six school leaders that are dedicated to planning, designing, building, testing and refining a new model for their school.

Jeffrey Tsang and Samir Bolar co-founded Mastery Design Collaborative (MDC) in 2013 with funding from the Eli and Edythe Broad Foundation and The Learning Accelerator. Prior to launching the nonprofit organization, both co-founders worked together at Education Elements, consulting with districts around designing and implementing blended learning models. Tsang also served as the Chief Academic Officer of the national charter network Lighthouse Academies and was the principal of Bronx Lighthouse Charter School in New York City. Bolar brings consulting experience from Deloitte and has educational roots from his role as a program director for Teach for America as well as his work as an eighth grade algebra teacher in Compton, CA.

After parting ways with Education Elements, Tsang and Bolar wanted to continue to consult with schools and districts, focusing exclusively on working as a service provider. In 2013, they began this work by supporting the Bill and Melinda Gates Foundation with components of the
Mastery Design Collaborative — (cont)

Next Generation Systems Initiative (NGSI).

Following phase one of the initiative, ten districts received grants to build a cohort of schools that would participate in a school redesign around personalized learning. Mastery Design Collaborative supported some of these schools through their redesign process. This was MDC’s first major project and led the organization to build relationships with some of the districts going through school model redesign.

MDC supported Henry County Schools in Atlanta, which was one of the districts that received funding through the NGSI initiative. The district still works with MDC today, but no longer through the Gates Foundation. By the end of the engagement, MDC will have helped Henry County Schools design 23 personalized learning schools with three different collaboratives. The nonprofit will also help the district secure financial resources necessary to move the plans for transformation forward.

Mastery Design Collaborative’s work with Henry County Schools acted as a catalyst for working with other districts in the area, and nationally. Additionally, the Broad Residency Program brought more work to MDC; the company developed a six-month professional development program around personalized learning for Broad’s residents, which are personalized learning directors from districts and charter management organizations. This included hands-on learning experiences, workshops and online modules. This work led to relationships with Fulton County Schools and Oakland Unified School District.

WORK HISTORY

By November 2016, more than 50 schools will have completed the Reimagine School program. MDC has worked with a total of 28 schools from Henry County Schools and Fulton County Schools in Georgia, plus 24 schools from California; these include schools in Oakland Unified School District, San Carlos School District, Foster City School District, as well as schools in Gilroy, Loma Prieta, Fremont, and five schools from separate districts in the Central Valley. The organization has also worked on strategic planning projects with the Brisbane School District and the San Mateo County Office of Education.

FUNDING AND BUSINESS MODEL

Mastery Design Collaborative is a nonprofit organization that provides school systems and leaders with support to personalize learning. In October 2013, before MDC had a full understanding of what its model would look like, the organization received $300,000 from the Eli and Edythe Broad Foundation and an additional $300,000 from The Learning Accelerator. They have not received any additional philanthropic support.

MDC operates under a fee-for-service model. The price of the organization’s services
Mastery Design Collaborative — (cont)

varies based on the length of the engagement, which spans three to nine months. Each collaborative involves up to ten schools with teams of four to six individuals representing each school. Half of the districts they’ve worked with have funded themselves directly and half have had an external funding partner. More often than not the funder identifies the schools or districts which will work with MDC.

THE WORK

WHO THEY WORK WITH

A typical MDC client is a district that is exploring innovative approaches to teaching and learning, and, in some cases, has already piloted these changes in a few classrooms. The organization is focused on scaling personalized learning; it ideally works with public districts that want to change what school is and can be, rather than districts looking to make small scale change. While individual schools are not typical clients, MDC sometimes makes an exception.

Mastery Design Collaborative also believes that there is an aspect of readiness that a district and school must have in order to work together successfully. The organization’s ideal partners have the leadership, motivation, the team and funding to make change happen. When all of these things are in place, the probability of a school continuing its redesign work after MDC’s role is over is much higher.

TYPES OF SUPPORT

Mastery Design Collaborative helps schools and districts personalize learning by leading workshops, facilitating design activities, holding planning meetings, and bringing schools together to collaborate. MDC works with schools and districts in three ways:

■ Strategic planning at the district level to develop a personalized learning vision and plan. This work begins with a readiness assessment.

■ Guiding cohorts of schools through three-, six- and nine-month programs—called Reimagine School Collaboratives—that focus on planning, building, testing and iterating new school models.

■ Hosting workshops around design thinking and prototype design during the collaboratives.

WHAT THEY DO AND HOW THEY DO IT

Mastery Design Collaborative’s mission is to personalize learning at scale. It straddles two lanes: personalized learning and school transformation. The organization views personalized learning as having five guiding principles: pace, path, people, place and
Mastery Design Collaborative — (cont)

agency. When asked to paint a picture of personalized learning, Tsang and Bolar describe a learning environment where students are decision-makers and agents of their own learning.

Districts that work with MDC are often looking for assistance because they have technology, but it isn’t making the impact they had hoped for. MDC engages with schools and districts in three ways: through strategic planning, professional development for teachers, and a program called the Reimagine School Collaborative. The collaboratives represent a large portion of MDC’s work and are designed to tackle what MDC views as the three main barriers to personalizing learning: district-level engagement, instructional design and teacher capacity to personalize learning.

The Reimagined School Collaborative

The Reimagined School Collaborative is a program where MDC supports a group of schools in redesigning its model with a focus on personalized learning. In these collaboratives, the organization works with the district to identify up to ten schools to participate in the program. Then MDC works with each principal to identify four to six individuals at their site that would best represent their school in the collaborative, typically including one or two administrators and three or four teachers.
As of fall 2016, about 50 schools nationally have completed the program. Most of these collaboratives have taken the form of six- to eight-month design boot camps, during which schools prototype an instructional practice and develop and test a school wide transformation plan in two or more classrooms; they create a school wide plan after testing the prototype.

Moving forward, MDC is breaking its Reimagine School Collaborative into two parts, which they call the personalized learning prototype program and the school redesign program. With the three-month prototype program, schools develop a small, low-risk prototype to experiment with a component of personalized learning. During the six-month school redesign program, schools map out how to redesign for personalized learning over the course of two to three years. A district can choose to participate in one program or both, with the total work spanning from three to nine months.

**Personalized Learning Prototype Program**

During the three-month prototype program, Mastery Design Collaborative provides three prototype design workshops and up to ten hours of site observations and consultations. The prototypes vary by school, depending on which of the five principles of personalized learning the school is trying to remodel: pace, path, people, place and agency. For example, to rethink pacing, a team might prototype a learning block where students work through content at their own pace. To explore learning paths, a school might create a menu of learning activities that students can choose from. If a team wants to consider alternative structures for staff, it might create a co-teaching model to provide differentiated instruction for a portion of the day. A school team wanting to support student agency might build a prototype of a system that allows students to set learning goals and track progress.

The goal is for each school to pilot a prototype that supports at least 30 students and provides at least five hours of learning opportunities for students each week, with assistance from MDC. The program has four phases:

- **Phase 1:** This two week phase starts with a half-day leadership meeting where all of the team leads come together to set goals for the work, followed by a Personalized Learning Diagnostic and the Personalized Learning Exploration Workshop. The diagnostic includes a combination of surveys, interviews and onsite walkthroughs with each team. The goal of the assessment is to narrow the focus area for the prototype. After the diagnostic is complete, team members attend the exploration workshop to identify the challenge they want to solve with their prototype. Then each member of the team does independent research on products and practices that can help build the prototype.
Mastery Design Collaborative — (cont)

- **Phase 2:** MDC hosts the Personalized Learning Prototyping Workshop during this two week phase. Teams collaborate to build a prototype of their model.

- **Phase 3:** During phase three, prototypes are launched and piloted for one month. MDC visits each school site for an observation and to provide feedback and coaching to the team.

- **Phase 4:** The final month-long phase is about prototype expansion. MDC brings teams together one last time for a workshop on how to expand the prototype to other grades or subject areas. The goal is for each team to present, give and receive feedback and craft a plan for expansion; the focus is on iterations that could make the model stronger and identifying any challenges that lie ahead.

**School Redesign Program**

The six-month school redesign program has two ultimate goals. The first is to build a blueprint that describes how to redesign a school for personalized learning in two to three years. The second is to educate staff around how to implement personalized learning practices into their classrooms. Throughout the program, MDC holds five school redesign workshops and provides 20 hours of coaching time. The coaching time is flexible and schools can structure it however they want. Frequently schools opt to put those hours toward 1:1 support for the project manager, guiding the principal in thinking through change management or, in some cases, face-to-face support for teachers.

At the end of six months, each school team should have a complete two- or three-year blueprint. Here are the four phases of the six-month program:

- **Phase 1:** This month-long phase is comprised of the same kind of assessment as the three month-program and the first workshop, Personalized Learning Strategy. If a school has already completed the prototype program, it does not need to redo the diagnostic assessment. During the workshop, team members work with MDC consultants to develop a plan for how to complete the blueprint. They also begin mapping out the first section of the blueprint, which is focused on building a school-wide strategy for implementing personalized learning in the classroom. After the workshop, teams present their work to their colleagues to get feedback and revise their strategy.

- **Phase 2:** There are two Personalized Learning Design Research workshops during this three-month research phase. At the workshops, teams analyze research about different approaches and identify which ones work best for their school. After each workshop, team members are expected to share their work with a variety of stakeholders from the community. This phase can also include visiting other schools, reading and discussing case studies and speaking with experts in the field.
Mastery Design Collaborative — (cont)

■ Phase 3: This month-long phase includes the fourth workshop, called Personalized Learning Alignment. It focuses on how changing the new model will impact school operations such as professional development, use of facilities, hiring, etc. The team designs a plan for the changes that need to be made and how to roll out those changes over the course of two or three years.

■ Phase 4: In the final month, teams have about 80% of their blueprint complete. They use that time to finish the last 20% and to revise the entire document. The team shares the blueprint with the whole staff to get final feedback and makes edits before submitting it to MDC. The last step is to share the entire blueprint with family and community members.

Post-support depends on the structure of the engagement. Sometimes a school’s work with MDC ends after the Reimagined Schools Collaborative; the school then takes responsibility for implementation. In some cases, after the final workshop, MDC follows up with visits and feedback to the school as it launches the new model. In other instances, MDC provides direct training for broader staff beyond the initial team, or hosts workshops to talk about school staffing, schedule, vision and more.

A SPECIFIC ENGAGEMENT

From spring 2015 to January 2016, MDC held a nine-month Reimagine Schools Collaborative in partnership with Next Generation Learning Challenges and the Rogers Family Foundation. This collaborative involved ten Oakland schools including ASCEND, a K-8 charter school in East Oakland. The ten schools each received a $100,000 NGLC planning grant from the Rogers foundation and were brought together to build and prototype a new school model.

For the instructional model prototype, ASCEND took on the challenge of providing learners with more instructional time at their appropriate levels. The school chose to incorporate four principles into the new model: place, people, path and student agency. To do this, ASCEND’s team developed a prototype for a daily, two-hour, multi-age literacy block and tested it out with half of the students in two grade bands: grades 1-3 and grades 4-5.

In order to rethink roles and staff, the team grouped the students by Lexile level rather than grade level. During the block, students rotated between self-directed learning activities and teacher-led activities. Self-directed learning took the form of independent and partner work, online activities, independent reading and journaling. Teacher-led activities consisted of small-group instruction such as guided reading circles for students grouped according to their Lexile levels. The prototype also featured a partnership with
Mastery Design Collaborative — (cont)

a local university Master’s degree program in which graduate students volunteered to provide push-in support for learners doing independent work. This strengthened the self-directed learning component, giving the teachers more freedom to focus on small group instruction.

To experiment with place, the school purchased a lot of low-cost and in some cases used furniture such as bouncy chairs, stadium seating and rugs. This furniture helped ASCEND’s staff transform the learning environment. Students began choosing where to sit each day based on their comfort and what worked best for the activity in which they were engaged.

With a focus on increasing student agency, the prototype incorporated goal setting; this gave students the opportunity to set weekly goals and have frequent conferences with their teachers to discuss growth. For the pilot phase, this tracking happened in a Google Doc. Moving forward, ASCEND is interested in finding a different edtech tool to help students and teachers manage goals and progress tracking.

Though MDC’s collaborative finished, ASCEND’s work with personalized learning continues. In January 2016, ASCEND was one of six schools that won a $350,000 grant from the Rogers Family Foundation to launch its blueprint. In fall 2016, ASCEND will expand the prototype to the entire elementary school. All students in grades K-5 will have a multi-age literacy block. Additionally, the school will adopt a multi-age math block and is currently vetting tools to support it. A longer term goal is to redesign the middle school program to look more like the new elementary model. According to Mastery Design Collaborative, ASCEND is on track to be a fully personalized school in two to three years.

COLLABORATORS AND COMMUNITY OF PRACTICE

In the past, MDC has recommended Summit Basecamp to some schools as a way to support implementation of the blueprint; the nonprofit has also recommended the Alvo Institute for professional development. MDC sees LEAP Innovations, Education Elements, 2Revolutions and Transcend Education as organizations that overlap with its work in regards to supporting schools in personalizing learning and catalyzing change.

Sometimes a school or district contacts MDC looking for support in building a specific program or designing a school with a particular focus such as a STEM school, a PBL school or a Maker school. MDC can offer assistance in personalizing any of these types of models, but doesn’t work specifically to create these programs. In such cases, MDC might refer the school to an outside organization such as the Buck Institute for Education or the New Tech Network.
Transcend Education

A nonprofit organization that partners with school leaders to build new models, while providing research and development for the field so those models can spread.

WHO THEY WORK WITH

- Individual Schools
- Districts
- Charter Management Organizations

FRAMEWORK CATEGORIES

VISION

STUDENT & TEACHER EXPERIENCE

IMPLEMENTATION SUPPORT

CHANGE MANAGEMENT

SHARING TO GROW A COMMUNITY OF PRACTICE

THE ORGANIZATION

FOUNDING STORY

Transcend Education is a nonprofit organization that provides design and implementation support to schools and districts as they experiment with fundamental changes to their school models. Transcend does this in three ways: building and replicating new school models, developing a community of talented individuals that can support school model redesign, and sharing knowledge on school model redesign. The organization, which launched in August 2015, was co-founded by Jeff Wetzler and Aylon Samouha; they met while jointly leading Teach for America’s (TFA) teacher preparation and ongoing support division in 2007.

Wetzler brings ten years of leadership experience from TFA to the table, in addition to nine years of consulting work with the Monitor Group. He received his doctorate in education from Columbia Teacher’s College. Aylon Samouha brings five years of school redesign experience as an independent consultant. He worked with Achievement First to build two Greenfield school models, as a consultant led research for the Charter School Growth Fund and the Clayton Christensen Institute, and consulted on the Chicago Breakthrough Schools Fellowship. He was also Chief Schools Officer at Rocketship Education and held senior leadership roles at Teach for America and SCORE! Educational Centers.

The seeds for Transcend were planted when Wetzler and Samouha were working on a project—with Achievement First’s Greenfield Schools—to design and build a school model focused on developing the skills that would lead to success in college. Samouha had been hired as an independent contractor, and Wetzler was a senior advisor on the project from the start. During their work together, they noticed a need for capacity building around design
Transcend Education — (cont)

thinking and knowledge sharing to help schools create and bring about change—so that school leaders could apply this approach to important areas such as budget, schedule, instructional models and everything in between. During the course of their work with Achievement First, they formed Transcend to meet this need.

WORK HISTORY

Transcend Education is interested in partnering with a limited number of school operators over an extended period of time—diving deeply into school model transformation—rather than working with numerous districts. Since its start in August 2015, Transcend has worked with Achievement First’s Greenfield Schools and is now beginning to expand.

Transcend partnered with New Schools Venture Fund to launch a cohort program with a goal of supporting and accelerating strong districts and charter networks exploring new school models. The ten-month program runs from August 2016 to May 2017. It includes Tulsa Public Schools, Van Ness Elementary School from District of Columbia Public Schools, Spring Branch Independent School District, Excel Academy Charter Schools, KIPP: Houston Public Schools, YES Prep Public Schools, Gestalt Community Schools, Camino Nuevo Charter Academy, Hiawatha Academies and Citizens of the World. The organization is also beginning work with Valor Collegiate Academies and Montessori for All, to design and develop their model and to codify their journey of change to share with the public.

Since Fall 2015, Transcend has partnered with Riverdale Country School head of school Dominic Randolph, KIPP co-founder Dave Levin, and Norman Atkins, founder of Uncommon Schools and Relay GSE, to build a new model of secondary education. The team has already completed the discovery phase and conceptualized their core design, and as of summer 2016 it is raising funds for designing and developing the model during the 2016 - 2017 school year.

FUNDING AND BUSINESS MODEL

In 2015 and 2016, Transcend Education received initial funding and support from eight organizations: Bill and Melinda Gates Foundation, Draper Richards Kaplan Foundation, Einhorn Family Charitable Trust, New Profit, New Schools Venture Fund, Raikes Foundation, Startup: Education, Oak Foundation and Carnegie Corporation of New York. As of summer 2016, the nonprofit is raising the next round of funding for the next three years of work both from returning and new funders.

The source of funding for each Transcend project varies. In some cases, there is an external funder who gives Transcend the opportunity to identify a school or district for a particular
Transcend Education — (cont)

project. In other cases, Transcend works with a funder to select a school or district for a project. Sometimes, Transcend assists a school or district in securing funding for a project.

Each project has a core full-time team as well as an extended team that aims to complement the capacity that already exists within the organization. For example, on the Greenfield project, Samouha is full-time and manages a team of eight people including one project manager, an education technologist, multiple experts in curriculum design, and specialists in social-emotional learning as well as school operations. Transcend is also focused on building a community of experts in school innovation, individuals who can be hired as consultants by the nonprofit or to work directly with school operators. Transcend is currently building a screening and vetting process for these specialists.

THE WORK

WHO THEY WORK WITH

Transcend’s sweet spot is working with schools, networks or districts that are led by visionary leaders who are looking to transform their existing model. The organization’s ideal partners have a strong vision, a culture of collaboration, and the necessary time and the resources to dedicate to the school model redesign.

TYPES OF SUPPORT

Transcend offers support in various forms, including design activities, meetings with school leaders, and facilitating workshops with external collaborators. Most commonly, Transcend provides support in:

■ Working with school and district leadership to map out the project by identifying goals, defining school models, and generating samples of guides, resources, schedules and more.

■ Supporting practitioners in building a blueprint that brings their vision to life including schedules, curriculum and other components of the model.

■ Helping schools build out and test each piece of their model and scale what works.

■ Recording and explaining the work that is taking place and helping schools share it with both internal and external audiences.

WHAT THEY DO AND HOW THEY DO IT

Transcend assists school operators with planning and implementing new school models. There are three components of the organization’s work: partnering with school leaders to create and implement new school models; building a group of experts who can support
Transcend Education — (cont)

school innovation; and helping schools share stories from their journeys of school model redesign.

Transcend’s leaders consider their work “research and development” for schools and districts that are redesigning their models because they apply learning sciences, motivation sciences and implementation sciences to the biggest questions school operators are wrestling with. They also believe schools need intensive support as they experiment, take risks, and test out changes to their currently functional models in order to find and sometimes create astounding models. The organization’s leaders are dedicated to sharing what works in as much detail as possible, and acting as a research and development engine for the entire field—in order to provide other schools with clear models they can emulate. Transcend plans to work with well known organizations to undergo significant experiments and then share the lessons it learns across the field.

Transcend uses the term “research and development partners” to describe the schools and districts with which it works. The organization’s model for supporting schools and districts through redesign has five phases: Purposeful Planning, Dream and Discover, Design and Develop, Capture and Codify, and Adopt and Adapt.

During each of these phases, Transcend helps schools answer questions such as, “What is my vision for this model I am trying to create?” and “How do we bring our vision to life?” The organization will work with a school or district regardless of which phase it is in. For instance, if a school has already been through a process to design and develop a model, Transcend will support that school to better record its decision making and codify what has worked. Each phase supports a different area of the process of transformation:
Transcend Education — (cont)

- **Purposeful Planning**: This phase is a time when Transcend works alongside the school or district’s leaders to identify the goals of the R&D project, the resources needed, and the timeline. The work includes developing a set of expectations around decision-making, communicating the work to internal and external stakeholders and choosing a rollout strategy. By the end of this phase, an “Adaptive R&D Plan” is generated. This document is a working plan that is modified throughout the school model transformation. It contains the following components: goals, timeline, resources, budget, funding, change management, integration and pitfalls to anticipate.

- **Dream and Discover**: The main goal of this phase is for the leadership team to develop a clear vision of the model that it wants to build. This vision comes together in what Transcend calls a “Dream Canvas,” which is a 15-20 page narrative that can include videos, photos and interviews. The Dream Canvas is used in a later phase to build the blueprint of the school model.

The process of crafting the canvas is rooted in experiential learning and involves engaging in user research, exploring other models, using principles of design thinking and holding workshops. The exploration of models can be specific to education, for example gaining exposure to innovative districts or schools with unique models. It can also mean seeking out models outside of education, such as examining Zappos’ Holocracy approach. During this phase, Transcend might bring in experts. For example in one project the nonprofit partnered with IDEO to bring human-centered design into the planning phase; in another, an astronaut shared how to think big and accomplish one’s dreams.
Transcend Education — (cont)

- **Design and Develop:** Transcend believes that the Design and Develop phase is the most critical because it has the most involvement from both educators and students. This phase usually takes one to three years, but occasionally more. Transcend thinks of the phase in two parts—part A (design) and part B (develop.) During part A, the Dream Canvas from the previous Dream and Discover phase guides the development of the blueprint, which is the core document for the Design and Develop phase. This document ranges from 40 to 60 pages in length and is a sort of “how-to” guide for bringing the new school model to life. It includes detailed designs around pedagogical approach, curriculum and assessment, schedules, routines, school culture, staff roles and responsibilities, communication plan, partnerships, budget, operational plan, technology and everything in between.

Once created, the blueprint is the basis for piloting and implementing the model. During part B, Transcend assists its R&D partner in bringing the blueprint to life. The principles of design thinking are core to Transcend’s work and in this phase; the organization and the leadership team build, test, learn and iterate components of the blueprint with an ultimate goal of refining the model.

- **Capture and Codify:** Wetzler describes this third phase as “bottling the magic” on several levels. During this phase, Transcend helps school and district leaders bridge the gap between visiting and being inspired by a school model, and actually replicating it. Sharing success takes a variety of forms, including documentation of the transformation process, telling the story of lessons learned, and identifying the conditions that enable the model to work. In a sense, this phase is about recording the process of creating the Dream Canvas, building the blueprint and bringing all of the work to life. It also involves codifying components of the model so they are transferable to others in the field who want to adopt them.

- **Adopt and Adapt:** This phase is meant to support school leaders that are interested in replicating an existing school model. This is a more recent category of work for Transcend. Specifics are still in development, but the nonprofit’s leadership says demand is high.

**A SPECIFIC ENGAGEMENT**

**Achievement First** has been running a network of schools serving low-income students in New York, Connecticut and Rhode Island for 15 years. In 2013, Achievement First’s Co-CEOs Dacia Toll and Doug McCurry were making observations about the current state of the network and decided that while it was making steady progress, they had not yet fully closed the gap in college persistence for low-income and high income students. They wondered how they could make more dramatic gains, better foster resilience, agency and other student skills that would lead to success in college and beyond. The network began...
the **Greenfield Schools** design project to research what the future of school could be, with the goal of opening two new schools in 2015—an elementary school and a middle school.

Toll and McCurry knew there needed to be a major redesign for the Greenfield model but their dilemma was finding the capacity necessary to make the changes. In November 2013, the network hired Samouha to lead the design effort and brought on Wetzler as a senior advisor to assist in planning and building the model for its Greenfield Schools.

The first Greenfield Schools launched in August 2015 in New Haven, CT. The elementary school opened with kindergarteners and the middle school started with fifth and sixth graders. During the 2015 - 2016 school year, the kindergarten and middle school pilots took place at separate sites. In 2016 - 2017, grades K-6 will be housed in the same building and a decision will be made in fall 2016 about whether to move forward at multiple sites or a single site.

Transcend is supporting the network with planning, design, implementation and iteration for the Greenfield Schools. Samouha has been working on the project full-time since the beginning and he manages a team of eight people including an education technologist, curriculum design experts, a social-emotional learning guru, a school operations expert and a project manager. The team has been involved in planning, building and refining the school model.

**Purposeful Planning**

Transcend and Achievement First engaged in the Purposeful Planning phase from September through December 2014. The phase began with Wetzler and Samouha having conversations with the leadership team around purpose and the goals of the project, including identifying what problem the network was trying to solve. The next step involved developing a strategy for the work; together they decided that the best strategy was to design a new school model from scratch. During this phase, there were also meetings to discuss the change management strategy, to build a budget for the project and to assist Toll in raising funds for the work.

**Dream and Discover**

This phase lasted about six months, ending in summer 2014. During that time, Wetzler and Samouha brought in IDEO to offer human-centered design expertise, help the leadership team conduct user research, and to apply principles of design thinking when planning for the work ahead. The leadership team explored various school models, finding inspiration in **Summit Public Schools, Acton Academy, High Tech High, Match Next, BASIS Independent Brooklyn, Ron Clark Academy** and **Montessori for All**. The team engaged in more than 70
design sessions and one-to-one interviews with members of the Greenfield community, including students, family members and staff members in order to build and iterate a vision for the Greenfield model.

**Design and Develop**

The work in the Dream and Discover phase resulted in an emerging blueprint for the transformation. The next step was to support the school in testing out some of the blueprint’s aspects of change; this Design and Develop phase started in summer 2014 and will continue at least through spring 2017. Transcend has been working side-by-side with the Greenfield Schools to pilot some of the new structures with small prototypes [see below]. Then Transcend helped Greenfield scale up what was working, expanding the pilots to kindergarten at the elementary school, and grades five and six at the middle school. Finally it helped the school leadership team figure out how to test out what was working on a whole-school level.

During the pilots, the Greenfield Schools tested out “running partners,” in which students work in pairs to share feedback and push each other to meet their weekly goals. The school also tested out Dream Teams, which are like support groups for each student. Each dream team includes the student’s running partner, a goal coach (which is a teacher), a family member and a community member—all of whom support the student inside and outside of school. Greenfield students lead quarterly meetings with their Dream Teams to share about their progress and goals. The model also incorporates self-directed learning time, and one of the pilots focused on making that time purposeful so that students could “race deeper” rather than “race ahead” on their competency-based progressions. The model also introduced “Expeditions,” which are experiential opportunities for students to explore how to apply their learning outside of the classroom in specific areas of interest such as photography. These expeditions occur every eight weeks and last for one or two weeks.

Compared to the original Achievement First school model, the Greenfield model has students spending substantially more time in small group learning (two hours daily), self-directed learning (two hours daily) and expeditions (four to eight weeks per year).

In order to make these changes, the school model reimagined staffing and integrated technology. There are now content-specific “leads” (experienced teachers) that facilitate large-group learning, and instructors (new teachers) that lead small-group learning and support self-directed learning activities. Expeditions are led by a specialist team that includes experts in the relevant subject area. The school uses **InnovateEDU’s Cortex Platform** to help students get organized with goal-setting, tracking their own progress and
communicating with their Dream Team.

During the 2016 - 2017 school year, Achievement First is expanding its pilot to grades K-6, which will all be housed at the same site. Their ultimate goal is to refine the model and plan to expand to other schools in the network.

**Capture and Codify**

As of summer 2016, Transcend and the Greenfield Schools are beginning the Capture and Codify phase with plans to ramp it up during the coming school year. The organization will support Achievement First until it can comfortably spread its model to other schools in the network.

Some schools from outside the network have contacted Achievement First with interest in replicating aspects of the model. Transcend is starting to help the network think about the Adopt and Adapt phase so that Achievement First can easily share their story of transformation with other schools and networks so that others can replicate the Greenfield model.

**COLLABORATORS AND COMMUNITY OF PRACTICE**

Transcend Education collaborates with other organizations to bring in expertise in specific areas that pertain to each redesign. For example, during their engagement with Achievement First’s Greenfield Schools, Transcend brought IDEO into the project to offer expertise in human-centered design. The organization also likes working with local community members, which it believes contributes to building a strong community.

Transcend co-founders view their own organization as unique because they view themselves as an R&D outlet. They work side-by-side with districts and think a lot about how to record and share their learnings broadly throughout their journey.
Emerging Insights

Through the course of this research, we have noticed certain patterns emerging. We have compiled trends, complexities and, since this is the beginning of our research, we have also included our lingering questions.

TRENDS

■ Vision Planning: Developing a vision for what a change or set of changes should look like is key to the process of school redesign. While many school leaders have a solid vision of the change they want to see on the ground, others struggle to define it. That is why the vision planning aspect of design is so critical to the work. We asked all of the service provider organizations to choose the five categories on the framework that best represented their work in schools and districts and 20 out of 29 organizations chose vision as one of their five.

■ Hand-in-Hand Support: The most frequently selected category was Professional Learning, with 18 organizations identifying it as one of their top five. Two other popular areas identified by service providers as areas of expertise were Implementation Support and Change Management, which were both chosen by 14 service providers. These three categories are very interconnected. They all speak to the on-the-ground support that schools need when implementing change.

■ But Why Isn’t It Working?: Many of the experts we spoke with reported that a common story from schools and districts is that they received new devices and technology tools but don’t see an impact on student success. These schools and districts are looking for support on how to use the technology they have to make a difference. However, of the 26 service providers we surveyed, only one mentioned EdTech Selection as one of its top five categories, and none of them identified Infrastructure as an area they commonly work on.

■ Community of Talent: Of the five organizations that we profiled, two are building a “network of experts” in specific areas of school model redesign, and others are bringing in other expertise as needed. Transcend Education calls it a “talent force” and 2Revolutions calls it a “talent cloud,” but the idea is similar. Each organization is building a mechanism for bringing in specialists with extensive background knowledge in a specific area to strengthen the transformation. It is possible that this will become a trend in the field.

■ Design Thinking: One commonality across all five organizations that we profiled is their application of the principles of design thinking. Although not all of them call it “design thinking,” all of these organizations approach the process of school redesign with a series of steps or phases that resemble the process of design thinking. While nomenclature varies, we are hearing these terms used again and again to describe school transformation: plan, map, explore, discover, design, build, prototype, test, implement, reflect, iterate, scale and share.
Emerging Insights — (cont)

COMPLEXITIES

- **Mo’Money, Mo’Problems**: Organizations that work with schools, districts and states receive funding in various ways. Sometimes an external funder pays for the service provided. In other cases, a school or district might use a portion of its budget to pay the organization for its services. The way these service providers are paid is very inconsistent and it has proven difficult to get clarity on related areas such as business model and pricing.

- **Show, not Tell**: More often than not, during our interviews, experts from the organizations we profiled would lead with theory and approach, but have a difficult time clearly articulating what their work looks like in action. This could be due to the ever-changing nature of their work or stem from working through a process that doesn’t result in a specific, consistent outcome across all engagements. A major part of the process for us was helping each organization find the words to paint a picture of the way it is transforming schools.

- **A Rose by Any Other Name**: One of the first issues that we encountered during our interviews was around nomenclature. When we started this project, we used the language “technical assistance provider,” but soon realized that most of the organizations we spoke with didn’t identify with the term and in fact, some felt uncomfortable even with the term “consultant.” The experts we spoke with used a variety of terms to describe their work including: school partner, research and development (R&D) engine, and design lab.

LINGERING QUESTIONS

- **Measuring Depth of Work**: In some cases, the ratio of employees to the number of districts and schools an organization supports raised some questions about the depth of each engagement. Considering which components of a project are virtual and which are face-to-face certainly helps. How can we measure the depth of the interaction between the service provider and the practitioners?

- **Implementation Support**: This category posed challenges because the definition varies greatly across organizations. This can mean facilitating workshops for staff members, providing in-person coaching sessions, or completing a series of observations during implementation. Implementation is a key component of transformation and the support needs to be strong, but how can we clarify and distinguish the range of support in this area?

- **Capacity Building**: Much of the work that gets started with service providers is a process of change. How can schools embed this process so they can continue to change on their own in the future?
Methodology

EdSurge began this research in March 2016, with the goal of building a framework to categorize the ways in which technical assistance providers support schools. To do this, we narrowed the type of technical assistance to a specific area of focus: school redesign.

For the purpose of this work, we aimed to keep the definition of school redesign as broad as possible. We didn’t want to limit the type of redesign work we focused on, recognizing that schools redesign for different purposes. Some want to create a personalized learning environment for students, others want to implement a project-based learning approach or build a competency-based learning system. It also quickly became apparent that the scale of redesign is quite variable, with some schools going through a full-scale transformation, redesigning their entire model from the ground up, and others engaging in partial redesigns on a smaller scale, sometimes at the level of just one classroom. To keep our research inclusive of a wide range of circumstances, we defined redesign as a transformation on any scale occurring at the classroom, school, district or state level. We did, however, make a conscious decision to focus on redesign of existing schools rather than designing a new school, though some of the service providers we included engage in both types of work.

Technical assistance providers represent a broad and diverse group of companies, nonprofits and even school-based organizations that provide consulting services. For the purpose of this research, we aimed to capture technical assistance providers as individual consultants and organizations that work with a school, district or state to support the process of redesign, which can range in scale from a small pilot to a full school model redesign.

To approach this research we conducted a scan of relevant literature, convened experts in a design session, and administered a survey to service providers in the field, interviewing several more thoroughly. Then we analyzed the data and wrote a collection of in-depth profiles. Our work concluded in August 2016.

RELEVANT LITERATURE

To learn as much as we could about the process schools undergo as they redesign their models and the existing technical assistance market, we conducted a scan of primary sources on these topics. Some important sources we used included:

- **Personalized Learning at Scale: Case Studies of Leading Cities** (Education Cities)
- **Continued Progress: Promising Evidence on Personalized Learning** by John F. Pane, Elizabeth D. Steiner, Matthew D. Baird and Laura S. Hamilton (RAND Corporation, funded by Bill and Melinda Gates Foundation)
Methodology — (cont)

- Dissatisfied Yet Optimistic: Moving Faster Toward New School Models by Stacey Childress, Aylon Samouha, Diane Tavenner, and Jeff Wetzler
- Roadmap for Competency-Based Systems: Technology Leader Pathway (The Council of Chief State School Officers and 2Revolutions)
- Blended Learning Resource Library (The Learning Accelerator)

CONVENING EXPERTS

In April 2016, we convened a group of school redesign experts who had either funded school redesign work in the past or supported schools through the process of transformation. Then we facilitated a design challenge, where participants took a rough framework and used it to identify the biggest questions technical assistance providers were equipped to answer. From this meeting we were able to produce the first iteration of our framework.

INTERVIEWS

To identify the process and areas of change schools wrestle with as they redesign their models, we spoke to over 30 individuals, including administrators, district central office staff, catalyst organizations, and funders such as EDUCAUSE, LEAP Innovations, NewSchools Venture Fund, CESA 1 and Silicon Schools Fund.

To better understand the role of technical assistance providers, we held multiple in-depth interviews with experts from nine service providers who support the process of school model redesign. Five of these interviews were used to write the organization profiles.

SURVEY

We also conducted a survey with 26 companies that support schools and districts through various types of change. The survey was designed to test out the categories in our framework, while also giving these organizations a chance to describe the work they are doing with schools and districts. We used the survey as the primary mechanism to build our three market maps. We also offered the five organizations we profiled an opportunity to respond to the survey. Education Elements completed the survey and is counted in the 26 companies. CA Group, 2Revolutions and Mastery Design Collaborative responded to portions of the survey during interviews and via email and are represented on the market maps. Transcend Education did not complete the survey. Altogether, there are 29 companies represented on the market maps.

BUILDING OUR FRAMEWORK

As a first step, we built a framework to categorize the elements of a school model that
Methodology — (cont)

Educators, administrators and district leaders consider when going through a redesign. The framework consists of 19 categories that support specific questions that practitioners are asking. To clarify how the categories relate, and to build a language that speaks to both service providers and practitioners, we created a series of essential questions.

WRITING PROFILES

To write the five profiles, we began by creating a set of criteria to help us select the organizations. The criteria included:

- Consulting as a primary function
- Spans multiple framework categories
- Breadth in the type of engagement
- School model redesign is a central focus
- Approach is flexible and not specific to one vision, model or methodology
- Works directly with schools and districts

After doing a quick scan of our larger list of over 30 service providers, we identified five that meet all of our criteria, approach the work in unique ways and are well-known in the field. We developed a standard interview protocol and used it to conduct three to five hours of interviewing with each organization. Our profiles were rigorously fact checked with each organization and aim to objectively characterize how each organization approaches its work.

We will continue to vet and evolve our framework as the field continues to grow and change. For now, we hope that it can offer a strong baseline to unite communication around areas of need for schools going through the redesign process, and for resources and services that can help them.