# LEVERAGING ORGANIZATIONAL CONDITIONS TO IMPROVE THE EFFICACY OF PROFESSIONAL LEARNING INITIATIVES

By Daniel Leyden Garvey

Capstone

Submitted to the Faculty of the Peabody College of Education and Human Development of

Vanderbilt University

in partial fulfillment of the requirements

for the degree of

DOCTOR OF EDUCATION

in

Leadership and Learning in Organizations

July 29, 2022

Nashville, Tennessee

Approved: Lacey Hartigan, Ph.D.

## Table of Contents

## Leveraging Organizational Conditions to Improve the Efficacy of Professional Learning Initiatives

## EXECUTIVE SUMMARY

The opportunity gap in the K-12 education system is well documented for Black, Indigenous, and other People of Color (BIPOC) students from low-resource households. BIPOC students experience additional challenges in accessing a quality education and are more likely to have a substandard teacher. To challenge the opportunity gaps experienced by historically marginalized students, many professional development organizations have implemented high-quality teacher leader development programs to improve the skillsets of teachers and gain their commitment to eradicating inequities. Although these programs have successfully developed teacher leaders, research has found that while teacher leaders grow professionally, their capacity to exact widespread change within their schools is dependent on school- and district-level leaders and conditions.

Leading Educators (LE), my partner organization for this capstone, has developed school and system conditions assessment tools designed to support school and system leaders to better understand the impact organizational policies and practices have on teacher and student learning. LE's theory of change is based on the assumption that if teacher leaders are developed within systems that support their efforts, instructional practice will improve. By extension, improvements in teacher practice will ultimately lead to more favorable student learning outcomes.

My study aims to better understand the current implementation practices around LE's system conditions assessment tool and to further support its efficacy and impact in framing and guiding professional development partnerships that are highly effective. In close collaboration

with my partner organization, I conducted qualitative interviews with staff representing different internal teams at LE, including development and partnerships, managing directors of networks, program team, and data and evaluation. These teams were selected because of their end-user perspective on the system conditions assessment tool.

I first examined the literature at the core of the systems conditions assessment tool and LE's theory of change, studies regarding systems-focused equity leadership, and school and system organizational conditions. This literature affirms the relevance of this area of inquiry and the emerging nature of systems theory research in K-12 schools. Additionally, these studies make explicit the connection between systems focused leadership and its impact on disrupting systemic inequities. Given LE is an organization that works in the area of professional learning for K-12 educators, this project also references professional learning literature as it relates to the internal learning structures within LE and the theory of change that drives their work with external stakeholders. LE is in constant growth and development while it looks to be a change agent for the partners it serves. It is with this in mind that I point to literature on organizational conditions and leveraging change. These concepts have applicability to the work that LE is doing externally with district partners and to internal processes as the organization evolves and changes to improve its programs. To guide my study, I used a conceptual framework based on Burke-Litwin's model for understanding organizational performance and change. Based on the problem, a review of the literature, and the conceptual framework, the following research questions guided this study:

1. How can LE generate partner district buy-in when conducting the system conditions assessment tool?

2. How can LE implement a process that streamlines the system conditions assessment's execution?
3. How can the most impactful system conditions be used to create an action plan with the LE partner districts?

Through the analysis of interviews with internal stakeholders, I identified the following findings: **Finding 1**—As a result of limited implementation of the system conditions assessment tool, successful practices of generating partner district buy-in were not identified. Interviewees articulated barriers in the internal and external environment that prevent them from engaging partner districts in the system conditions assessment tool, which, if addressed, could contribute to broader implementation.

**Finding 2**—Interviewees offered a wealth of suggestions for embedding the system conditions assessment tool at all stages of partnership with partner districts. Additionally, interviewees presented possible solutions for increasing the confidence of LE staff in their skillset to successfully support district partners in developing system conditions.

**Finding 3**—At the time of the interviews, there was insufficient data to adequately answer this question because the implementation of the system conditions assessment tool had been too limited. Interviewees who reported they had used the tool offered examples of mostly internal uses. Little evidence was found to suggest wide scale implementation of the system conditions assessment tool with district partners. In order to identify the most impactful system conditions, more data must be collected. However, there is internal investment in the insights the system conditions assessment tool could eventually provide.

Based on these findings, this project offers the following recommendations:

**Recommendation #1**— Build LE's internal capacity to support the system conditions assessment tool implementation.

**Recommendation 2**—Embed the system conditions assessment tool at all stages of partnership and plan for implementation.

**Recommendation 3**—Collect additional data from the implementation of the system conditions assessment tool in order to analyze and develop insights to target network support, articulate connections across LE tools, and generate new product offerings.

## INTRODUCTION

My partner organization, LE, is a nonprofit with a national presence. The collective wisdom within LE suggests that sustainable professional learning partnerships are supported by the optimization of school and system conditions. Although the school conditions assessment tool has existed for 3 years and the system conditions tool for nearly 2 years, senior leaders at LE question whether the system conditions assessment tools are being used to their full potential (Garvey & Tasker, 2021).

At its founding, LE was a teacher leader fellowship focused on middle-level leaders in the classroom. After receiving leadership and content development, the teacher leaders in the fellowship returned to their respective schools to find school-level barriers to the systemic implementation of what they learned. In an effort to achieve greater alignment between teacher leaders and building-level leaders, leadership teams and principals were included in the fellowship; however, a similar challenge became evident. District-level leaders were misaligned with school-level initiatives. Noticing that this phenomenon was not specific to one school district, but rather generalizable independent of context, LE realized alignment within schools and systems has an impact on teacher leadership and professional learning. In response, it developed a school conditions assessment tool and then a system conditions assessment tool to help solve some of the alignment challenges. These tools were designed with the intent of eliminating barriers to professional learning systems becoming sustainable and having a notable impact. Both tools offer a systematic look at the conditions in schools and systems to prioritize what needs to be done and to identify the obstacles that are preventing teacher learning and limiting student learning.

The purpose of this capstone project is to better understand how the system conditions assessment tool's use can be maximized in support of professional learning partnerships. As a professional learning organization committed to advancing systems-focused equity leadership, addressing the whole system is central to LE's mission of supporting teachers to best serve students while also recognizing that inequities and racism are embedded in the systems and structures of society. Individual action is insufficient for dismantling these barriers. School system leaders need to systematically analyze the system and investment of time and resources in order to disrupt inequities and racism.

## ORGANIZATIONAL CONTEXT

LE is a national nonprofit organization that seeks to partner with disenfranchised school systems to improve teacher and student performance. Specifically, LE looks to build school and district leaders' capacity to develop and sustain systems of professional learning. In its conceptualization of sustainable professional learning, LE advocates for creating supportive networks of teachers and instructional leaders that look critically at student learning and facilitate reflection on their instructional practices. LE understands systems of professional learning to be multidimensional and complex. For organizations to make meaningful change, they have to evaluate internal factors while taking into consideration organizational conditions (Leading Educators, n.d-g).

Above all, LE is committed to disrupting the opportunity gaps that put Black, Indigenous, and other People of Color (BIPOC) students at a disadvantage in K-12 schools. LE partnerships support school and district leaders' ability to identify implicit biases that contribute to educational inequities (Leading Educators, n.d-i). In its nearly 10 years of existence, LE has been committed to improving the efficacy conditions at the school and system level within its partner districts. Targeted efforts to address efficacy conditions—organizational policies and practices—represent an important element of LE's theory of change, which asserts that the strengthening of school and system conditions leads to improved teacher collaboration, learning, and the removal of obstacles to learning. LE views strong learning communities as the foundation for the disruption of inequities and the affording of opportunities. The organizational evolution of LE and the lessons learned from the different iterations of its programming have contributed to the current foci of its partnerships.

LE was founded in New Orleans in the post-Katrina period of school reconstruction and reforms in 2008. It was initially conceived as a fellowship model in which teacher leaders would be sent from their schools to a LE leadership program to learn instructional strategies and leadership skills. This emphasis on teacher development stemmed from the organization's core belief that, within schools, teacher performance is a crucial factor for student performance. Based on data collection on the efficacy of LE's programming, LE leadership identified that the experience of teacher leaders in these leadership programs was formidable, and they returned to their schools empowered; however, many encountered significant challenges that would ultimately limit their ability to enact schoolwide changes consistent with their learning (Garvey & Tasker, 2021). LE post participation surveys found that participants reported challenges such as issues of alignment between what they had learned as best practices and the decision-making occurring in their school buildings. Furthermore, these teacher leaders highlighted the barriers associated with inadequate time and resources as well as inconsistent visions for teaching and learning at the multiple hierarchy levels within the school building and district. As a result, in the design of the system conditions assessment tool, LE data and evaluation staff contemplated levels of hierarchy and complexity beyond teacher, teacher-leader, and building leaders to include system-level leaders and key organizational conditions at the school and system levels (Leading Educators, n.d-d). Additionally, they expanded their programming to engage with district and systems personnel, not just singular teachers.

Presently, LE works with 16 school districts across the country. Since 2008, more than 2,000 teacher leaders have participated in an LE program, supporting the instruction of 48,479 students. LE's partnership agreements are typically multiyear efforts, ranging from 3–5 years. As its program has expanded from New Orleans to become a national effort, the need to provide

customized programming to increasingly unique contexts requires differentiation and flexibility on behalf of the organization (Leading Educators, n.d-d). The contextualization and customization of multiple partnerships across the United States, many at different stages of development, introduced a new challenge to defining, committing to, and creating alignment with a core set of values. LE has engaged in an iterative process of developing, evaluating, and revising frameworks that are intended to create focus and coherence across their partnerships (Garvey & Tasker, 2021). The initial phases of this work have illustrated that there is no explicit coherence between the frameworks and the tools of measurement.

**Internal and External Organizational Challenges**

Like many educational nonprofits, LE occupies a unique space. While headquartered in Washington D.C., LE is completely virtual with staff located across the United States. Their teams are comprised of experienced classroom teachers, veteran school and system leaders, content and coaching experts, and passionate equity advocates. Within its online organizational structure, LE staff are sorted into teams based on their diverse skillsets. These LE collaborators are placed in the leadership, extended leadership, projects, network support, program strategy, external relations, impact, or operations and people teams (Leading Educators, n.d-f). While this specialization within teams serves a purpose, it leads to siloing and limits the overall conceptual understanding of the theory of change. The organization's funding structure further compounds the internal challenges it faces. LE receives financial support from a number of foundations[1] with diverse objectives. While these foundations are committed to establishing equitable learning

[1] Baptist Community Ministries | The Bill & Melinda Gates Foundation|The Booth Bricker Fund |Carnegie Corporation Of New York | Charles And Lynn Schusterman Family Philanthropies | Chan Zuckerberg Initiative | Doug And Maria Devos Foundation | Greater New Orleans Foundation | Hearst Foundation | Lloyd A. Fry Foundation | Mcdougal Family Foundation | New Profit, Inc. | Newschools Venture Fund | Overdeck Family Foundation | Pro Bono Publico Foundation | Selley Foundation | U.S. Department Of Education, Investing In Innovation | W.K. Kellogg Foundation

environments for all students (Leading Educators, n.d-e), each one represents a unique partnership depending on its respective mission and purpose as it relates to the field of education. External stakeholders are driven to provide funding based on their desired organizational impact. In addition to managing the expectations of its partnerships, LE also must meet the needs of its funding sources.

In its promotional materials, LE highlights the results a select number of its partnerships have seen in student outcomes, teacher knowledge and beliefs, and school and system conditions (Leading Educators, n.d-c). LE's student outcome analysis is publicly available and illustrates the improvement on the state standardized assessments in Washington D.C., Louisiana, and Michigan in the areas of English Language Arts and Mathematics (Leading Educators, n.d-h). To demonstrate the impact of the organization, LE compares teacher knowledge and beliefs with nationally representative data from the Rand Corporation's American Teacher Panel containing approximately 2,745 survey responses (Opfer et al., 2016). A content knowledge assessment developed by Rand Corporation and Student Achievement partners is administered to all teachers in partnership schools once per year. LE highlights its finding that teachers supported by its programming start with pedagogical content knowledge lower than or comparable to national benchmarks but consistently surpass them after 1 year. Additionally, LE data suggest that its partnership participants develop more equitable beliefs through their collaboration, citing that 92% of educators demonstrated more equitable beliefs after 2 years of support from LE (Leading Educators, n.d-b). While these results are promising, LE aims to have every school district with which it is partnering reach and exceed these benchmarks.

**School and System Conditions Assessment**

In 2018, LE found that teachers who were most successful in implementing the strategies learned worked in school environments that were supportive of their efforts to affirm equity and recognized teacher leader agency. In the spirit of furthering organizational change and assessing the school environment, LE developed a tool that critically examines these organizational conditions. These subcategories of this tool, referred to as school conditions, include six significant factors: presence of distributed instructional leadership, diversity of the instructional leadership team, curriculum alignment, scheduling, number of priorities, and nonsystematic approaches to professional learning (Leading Educators, 2019). Of the six, three have been identified as having the greatest impact: aligned curriculum, master schedule, and limited priorities (Garvey & Tasker, 2021). School teams and their LE partners rate school conditions twice per year on a three-point scale. Based on 3 years of data, LE has established that each one of the items on the conditions assessment is a predictor of impact, affirming its assumption that school conditions are a moderating factor for the achievement of significant student outcomes and growth in teacher knowledge and beliefs (Garvey & Tasker, 2021). Furthermore, conditions assessment data have permitted LE to identify larger organizational values, processes, and practices that either facilitated or limited organizational change.

Similarly to how LE concluded that teacher leaders were most successful in schools with favorable organizational conditions, LE came to the realization that schools also operate in unique systems and are significantly impacted by system-level conditions. LE has identified the following factors that constitute system conditions: Establishing a vision for teaching and learning (defined vision and stakeholder ownership); aligned roles, responsibilities and resources (aligned roles and responsibilities, aligned resources); integrating learning for impact (focused

professional learning, data-driven improvement). From its start as a teacher leadership program to a more broadly conceptualized whole-system professional learning approach, LE has articulated the relevance and impact the district system has on schools and, by extension, the teaching and learning taking place. As part of a systematic approach, LE collaborates with district partners to self-assess using the system conditions assessment once per year. The results of the assessment are then compiled and intended to be used to support the planning and monitoring of progress of the system-level conditions for instructional improvement. As a more recently developed tool, LE does not yet have sufficient data to assess which of the system conditions has the greatest magnitude of impact.

System conditions is a new and emerging manner of understanding professional learning partnerships (Garvey & Tasker, 2021). LE is interested in further examining how system conditions can be used to maximize the efficacy of professional learning programs. This project will focus on examining LE's implementation practices of the current system conditions assessment tool. The goal of the project is to inform how the system conditions assessment tool can be employed effectively to create the conditions for achieving significant gains in teacher and student performance.

**Problem of Practice**

Although the school conditions assessment tool has existed for 3 years and the system conditions tool for nearly 2 years, senior leaders at LE question whether the system conditions assessment tools are being used to their full potential (Garvey & Tasker, 2021). Senior LE leaders state that the system conditions tool's existence is common knowledge and recognize that it is shared annually with partners; however, they hypothesize that a more systematic approach to the system conditions would increase the probability of generating the intended impact (Garvey

& Brown, 2021). As LE critically reflects on its current partnerships and the system-level conditions that lead to more effective partnerships, the issue to better understand is how insights from the system conditions assessment tool can be most effectively used to support district partners. LE leaders hope to be able to collect sufficient data to identify the most impactful system conditions and use these insights to create action plans with LE partner districts that include strategies for monitoring its implementation.

Multiple internal teams at LE interact with the system conditions assessment tool and the insights it offers. Although their uses of the tool are distinct, the data evaluation, programming strategy, and network teams work with one another on further developing, implementing, and analyzing the tool's results. Another area of further inquiry for LE is assessing whether the appropriate internal and external stakeholders are present at the analysis, presentation, and debrief stages of the system conditions assessment. This, in addition to determining how team members can better analyze a system conditions assessment report (assess and internalize the resource as well as put it to use with partners), will provide important insights for its effective use. Successful interventions with district partners will result in buy-in and active engagement with the tool and movement across the continuum of the prioritized indicators. A strategy will be necessary for effectively reporting the results and streamlining their execution.

LE is advocating for the assessment of system conditions due to its belief that they represent a key element for the success of its partnerships. Measuring system conditions and engaging in the creation and monitoring of an appropriate action plan will contribute positively to the interventions designed to create more equitable learning environments.

## LITERATURE REVIEW

The challenge for LE is working collaboratively with school districts to achieve more equitable learning environments for students. The focus of this capstone is one element of its overall strategy, addressing the organizational conditions and practices that have the potential to facilitate or limit the success of the interventions LE employs to improve teacher practice and student outcomes. Most of the existing research on the topic of conditions has focused on school-building conditions, with relatively few examples emphasizing conditions and practices that extend beyond the school and permeate the whole system. Therefore, the intent is to determine how the knowledge of the impactful system conditions can be used to create action plans that assist school districts in advancing their professional learning strategies. Literature from the field of systems thinking and improvement science will further inform the implementation components of the research questions.

In order to address the project questions, I began by reviewing literature on systems-focused equity leadership and its implications for school systems. Due to the fact that sustainable professional learning, as opposed to professional development, is a key focus of the organization, this area has informed the line of inquiry. Context and environment as moderating factors for improvement are at the center of the identifying conditions. As a result, school and system conditions literature are referenced. Ultimately, the intent of these research questions is to improve the efficacy of the organization's work with partner districts. Therefore, literature as it relates to change management, systems thinking, and improvement science supports the analysis.

## Systems-Focused Equity Leadership

Like many nonprofits in the educational sector, LE is focused on equity. To contextualize equity within system conditions, key literature on systems-focused equity leadership will be discussed. The system conditions assessment tool created by LE is currently in iteration 7.0. The most recent changes have been inspired by LE's commitment to equity and their efforts to ensure that language reflective of this core value is embedded in its frameworks and tools (Garvey & Tasker, 2021). The individuals responsible for leading school systems, educational leaders, have a tremendous impact on the affordances and opportunities for students, in particular Black, Indigenous, and other People of Color (BIPOC); low-income; and historically underserved students (Khalifa et al., 2016). Because they are the target population for the system conditions assessment tool, it is essential that dialogue about systemic conditions maintain equity at the forefront.

Standard 1d of LE's system conditions tool is "Our system's vision for teaching and learning is explicitly anti-racist, emphasizing both equitable practices as well as outcomes" (Leading Educators, 2021, p. 1). Assessment participants are asked to consider to what extent the statement describes their school system. This is reflective of a race-explicit approach. Critical race theory rejects notions of "colorblind" discourse in favor of acknowledging raced-based patterns (Bonilla-Silva, 2006). This shift represents the critical role of the educational system in addressing racism and the acknowledgement that racism is perpetuated through societal systems. Its disruption requires systemic change and critical perspectives on power, race, and society (Sefa, 2003).

The manner in which schools and systems operate, especially in the allocation of system resources (e.g., human, financial, time, technology), has the potential to disrupt disparities or

perpetuate them. Systems-focused equity leadership literature focuses on critically analyzing inequities and addressing their systemic roots. Although the school system exists within a unique context and society at large, historical disenfranchisement may be minimized by targeted decision making, resource allocation, and efforts to shift individual beliefs and behaviors (Honing & Honsa, 2020).

School systems are complex ecologies with people at their core. The environment of schools and systems is a reflection of the practices, beliefs, values and identities of the individuals who are part of it. Equity leadership calls on leaders to continually seek to understand how their own leadership, identity, and positionality evolves and impacts the system (Briscoe & Khalifa, 2015).

**Professional Learning**

Sustainable approaches to professional learning are central to LE's philosophy. The shift from professional development to professional learning is indicative of a shift in thinking about teachers and instructional leaders as adult learners. The more traditional of the terms, "professional development," consists of workshops, whole-group presentations, training, and other compliance-based activities that are loosely connected to one's context and fail to result in significant changes in student outcomes. According to Lois Brown Easton (2008) the demands of the current educational landscape necessitate that educators continually learn, replacing professional development with professional learning. She goes on to identify learning as critical to the change process and the pursuit of different results. Even the most effectively executed professional development activities fail to produce learning outcomes for teachers that are significant enough to alter student outcomes. He clarifies his position, stating, "These activities

are not useless, but they can never be powerful enough, specific enough, or sustained enough to alter the culture of the classroom and school" (Fullan, 2007, p.35). This is at the core of LE's prioritization of teachers learning collectively about content and embracing professional learning as a driver of student learning (Leading Educators, 2021).

The research literature supports the notion that teachers who participate in high-quality professional learning experiences improve their teaching skills (Garet et al., 2001). This study examined a large number of mathematics and science teachers and offers an empirical comparison of the effects of professional learning on teacher learning in the form of skills and changes in classroom practice. The data in this study also support the assertion that the more sustained the professional learning, the more effective it is in improving teacher practice. For the purposes of this project, and in terms of professional learning, sustainability is multidimensional and includes the duration of the impact, community building based on reflection and discussion, context specificity, disciplined inquiry, and systems thinking (Zehetmeier & Krainer, 2011). The sustainability of the effects of professional learning as well as its longitudinal impact on student learning outcomes is still an emerging area of research (Avalos, 2011), .

**School and System Organizational Conditions**

The current school and system conditions assessment tools developed by LE are research based. In its formulation, LE worked with consultants who were drawing upon the research literature on environment as a moderating factor of school improvement. Within the field of school improvement, organizational context and conditions emerged from research on principal efficacy. These studies were interested in exploring the direct impact of the principal's efficacy on student outcomes (Lee et al., 2021). Although the literature is fairly consistent in showing that

principals do have an impact, key organizational elements on the school and system level as well as the specific context in which school improvement occurs are also relevant factors meriting analysis.

LE's school-enabling conditions assessment is organized in terms of the diversity and distribution of instructional leadership, the alignment of curriculum and assessment, the master schedule, and limited priorities. Studies on organizational factors and professional learning substantiate these domains. The first two domains of distributed leadership, described in the literature as "participative decision making," report results in greater internalization of school goals, commitment to sustaining change, and increases in teachers' self-efficacy (Smylie, 1988; Smylie et. al., 1996). The third and fourth domains, alignment of curriculum and assessment, represent the importance of teaching to and assessing at the true rigor level of the standards (The Center for Curriculum Renewal, 1998), while the master schedule and limited priorities are process focused so that work is organized in a manageable way.

**Leveraging Change**

For the purposes of this study, I accept the accuracy of the system conditions as predictors of facilitating the success of the professional learning strategies. The challenge is in determining how the information learned from the system conditions assessment tool can be most effectively used to support district partners. The literature on change management, improvement science, and systemic thinking offers critical insights for navigating these topics. Dialogue and active communication between LE personnel and district partners is critically important for trust to be developed and for both parties to embrace change (Finnan, 1996).

LE administers the system conditions assessment tool at least once a year with its district partners. The collection of accurate data depends in part on the buy-in generated in the tool's utility for addressing relevant challenges for the organization. The literature highlights that buy-in is not simply an individualistic factor and that environment, management, organization, and process can also account for variations in buy-in (Chevalier, 2003). Furthermore, district partners need to be invested in the idea that the tool and the action planning surrounding it are not only about new things the organization ought to do, but also unlearning actions and behaviors that might not be creating optimal conditions (Schein, 1996). The buy-in from district partners should come in the form of commitment, as opposed to compliance, as commitment brings about real and meaningful changes (Senge, 1996).

As a follow-up to the system conditions assessment tool, LE staff meet with district partners to share their results and create an action plan. The data derived from the assessment tool inform districts on how they are doing, what is and is not working, and provides the input to adjust their efforts in order to improve (Schmoker, 1996). A well-defined action plan results in measurable improvement and specifies strategies for implementation, time lines, and performance-measurement benchmarks (Carr and Douglas, 2001). Review of the literature also highlights the importance of the action planning teams including members with skills and knowledge in the areas of interest as well as a commitment to meeting on multiple occasions to review the action plan's progress (Carr and Douglas, 2001). Action plans result in changes and modifications, and this may be disruptive and uncomfortable for stakeholders (Bolman and Deal, 1999); therefore, participatory processes are preferable to isolated ones.

The review of the literature offers many concrete conceptualizations of the areas of interest encompassed by this project's research questions. The qualitative nature of this project leaves open the question of how these theories and concepts apply to the specific context of LE and their work with their district partners.

## CONCEPTUAL FRAMEWORK

The comprehensive review of the literature and preliminary conversations with LE has indicated that systems theory provides a useful lens for addressing the research questions. Systems theory has been applied to multiple contexts including and outside the field of education. Due to the nature of the work in which LE engages, the focus of this capstone will be "complex adaptive systems" of the type found in social systems. Katz and Kahn apply this concept to organizations using general systems theory; they regard all organizations as open systems, involving an "energic input into the system, the transformation of energies within the system, and the resulting product of energic output" (1978).

A system is defined as a set of interrelated entities with regularities in the ways that the entities behave such that a boundary can be defined between what is inside and outside the environment (Cunningham, 2014). The structure and dynamic of these systems are impacted by the internal and external interrelationships. Systems evolve over time and exhibit behaviors that can be identified and analyzed. A key element of systems theory is the analysis of the whole in addition to the parts, and the assertion that any one view of the system is incomplete. Recognizing the multifaceted nature of systems, systems theory relies on disciplined inquiry. Systems thinking is the application of systems theory to systematically improve systems in order to solve a problem.

As a model for isolating elements of the system for further analysis, the Burke-Litwin model for understanding organizational performance and change informs this study. This model distinguishes between transformational and transactional factors within complex systems. See **Figure 1** below with the different factors and their interconnections. This model considers the interactions between the external environment and organizational conditions and how they

impact individual factors such as motivation and individual and organizational performance (Burke & Litwin, 1992).

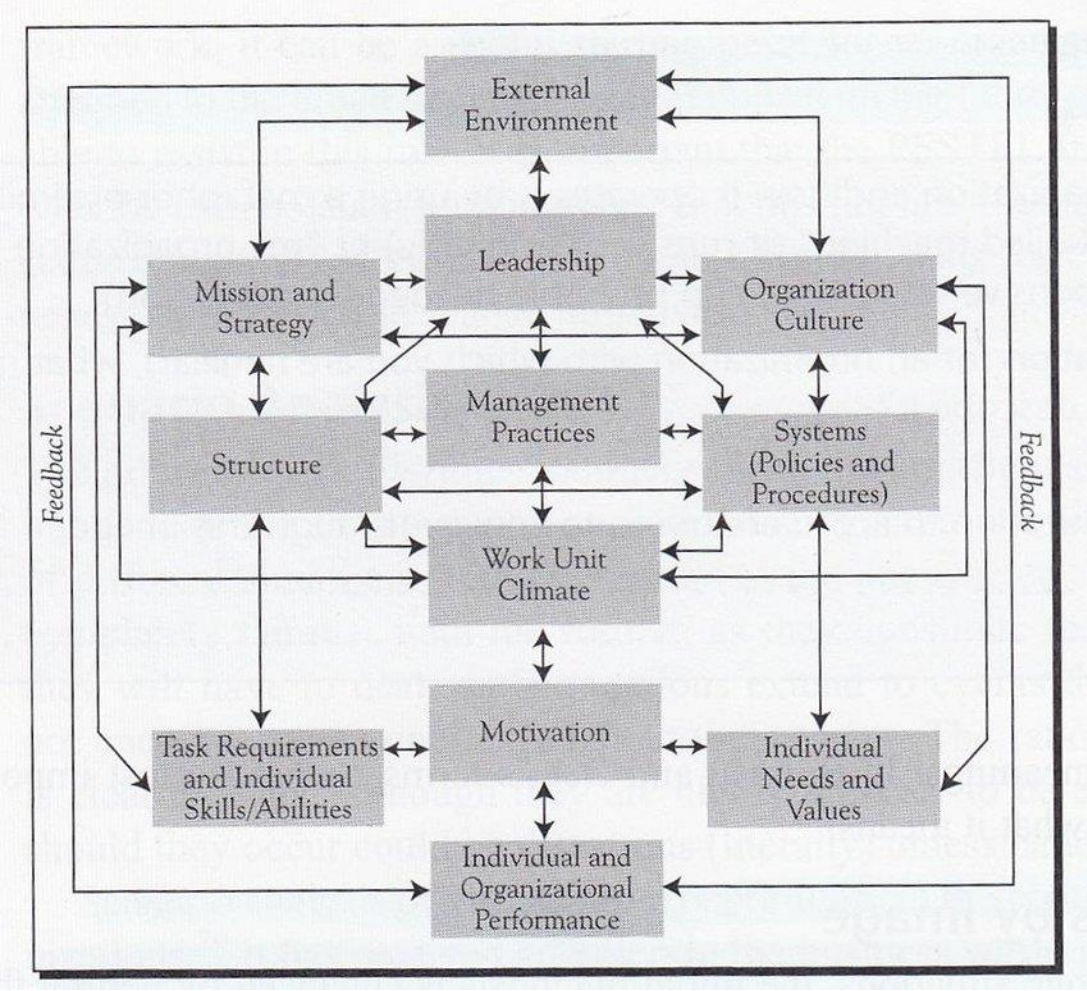


***Figure 1:*** *The Burke-Litwin Model Causal Model of Organizational Performance and Change*

This model highlights multiple drivers of change and sequences them from most to least important. As reflected in the interrelationships between each driver, this model shows the interrelations between one driver and another. In thinking about the problem of practice, the Burke-Litwin model prompted me to adopt multiple lenses in my data collection and analysis. For example, it was critical to understand the individual stories of the participants in my study, how long their tenure was with LE, and what the expectations of their roles and backgrounds

were. I developed lines of inquiry to further explore how they were using the System Conditions Assessment, barriers to its implementation within the external environment, how its use was understood within the work unit, and the training and execution surrounding the tool's implementation. The information collected from data gave me insights into the internal dynamics within LE and its different work units in addition to the interplay between the LE system and the external systems of district partners it is looking to impact.

Initial conversations with LE representatives suggested that there are different perspectives on the system conditions assessment tool shaped by the nature of the individual's work with the tool. Further examining individuals' perspectives on the different teams that use the conditions assessment tool will be fundamental to this research. Additionally, the systematization of the current system will be reviewed to ensure that it is inclusive of perspectives and meaning making at each stage of the process.

## PROJECT QUESTIONS

When teachers are developed within systems that are supportive of their learning, instructional practice will improve (Fullan, 2007). Therefore, system conditions such as organizational policies and practices are key factors in removing barriers that prevent teacher growth and the achievement of more favorable student learning conditions. When every student consistently experiences high-quality teaching in supportive learning environments, student learning outcomes improve. The improvement of student learning outcomes creates opportunity and disrupts inequities in education. In close collaboration with LE, this study is intended to inform the use of system-level conditions in framing and guiding highly effective professional development partnerships.

My specific project questions are as follows:

- How can LE generate partner district buy-in when conducting the system conditions assessment tool?
- How can LE implement a process that streamlines the system conditions assessment's execution?
- How can the most impactful system conditions be used to create an action plan with the LE partner districts?

## PROJECT DESIGN

Data on the project questions were collected through qualitative methods. Interviews were coordinated with LE staff members who are directly involved with the conditions assessment tool's implementation on the multiple internal teams at LE. Interviewees included representatives from the development and partnerships team, the managing directors of networks, the program team, and the data and evaluation team. These interviews were structured with sub questions for the purpose of further probing the participants' experiences and perspectives as they relate to the execution of the tool. I conducted the interviews through the Zoom web conferencing platform, and they were recorded and transcribed.

This study's data collection approach was consistent with the modality of the organization as entirely virtual and was considerate of the participants' time constraints. The time allotted for each interview, including protocols and introductions, did not exceed 60 min. A well-organized process including an introductory email prior to the interview and then a description of the protocol and questions aligned to the research questions (Appendix A) was created, providing all participants with clarity of the scope and purpose.

### Data Collection tools

Each project question was aligned with a data collection tool to ensure data were collected to answer the diverse elements of each question. See **Table 1** for a detailed description of each question and the corresponding data collection tool.

| **Project Question** | **Data Collection Tool** |
|---|---|
| • How can LE generate partner district buy-in when conducting the system conditions assessment tool? | Qualitative Interviews—Development and partnerships, managing directors of networks, program team, and data and evaluation team members |

| | |
|---|---|
| • How can LE implement a process that streamlines the system conditions assessment's execution? | Qualitative Interviews — Development and partnerships, managing directors of networks, program team, and data and evaluation team members |
| • How can the most impactful system conditions be used to create an action plan with the LE partner districts? | Qualitative Interviews — Development and partnerships, managing directors of networks, program team, and data and evaluation team members |

***Table 1:*** *Project Questions and Corresponding Data Collection Tools*

To determine which individuals would be most appropriate to engage in interviews, I worked collaboratively with my point of contact from LE. We decided to begin the interviews with the managing directors of networks. We selected managing directors of networks because of their end-user perspective on the implementation of the system conditions assessment directly with partner districts. After completing the first four interviews with the managing directors of networks, it became clear that a thorough understanding of the problem of practice would require expansion of the interviews to include stakeholders on other internal teams within LE. In collaboration with the partner organization, I identified new groups of interviewees who were either in upper leadership at LE supervising the work of the managing director of networks, members of parallel teams internally that engage with the system conditions assessment, and subordinates to the managing directors of networks. This resulted in an additional nine interviews with representation from the development and partnerships team, program team, and data and evaluation team. I invited all interviewees to schedule a time for an interview via Zoom at their convenience using Calendly. In addition to my interview letter, LE leadership sent internal communications to inform each participant about the scope of my study and to let their corresponding supervisors know the study was approved.

I facilitated all 13 interviews via Zoom. The interviewees were assured of their anonymity and I asked for their confirmation before recording. I recorded the interviews using the internal cloud recording function in Zoom, capturing voice and video. Additionally, I used my cell phone to record the audio as a backup. Each interview followed the established protocol, with minor deviations to probe for additional information. I did not take notes, but rather focused my attention on listening as intently as possible to the answers of the interviewees in order to provide meaningful follow-up questions.

## INTERVIEW ANALYSIS.

The recordings from each interview were shared with an external provider, Matchless Transcription. This transcription service converted all 13 audio files into transcripts. Post-interview, I sent the interviewees thank-you emails for their participation in my study.

Upon completion of all of the interviews, I began the first draft of my codebook. I first reread my literature review, conceptual framework, and interview questions to identify codes that aligned with my research questions. I also took one of the larger transcripts and read through the text to identify codes that were evident in the transcript that I might have missed in the review of the first sections of my capstone project. Using the transcript as the starting point resulted in an abundance of divergent codes and limited direction toward responding to my research questions; therefore, I primarily relied on codes that connected with my conceptual framework and the Burke-Litwin model as well as codes that aligned with the interview protocol. The excerpted codebook can be found in **Table 2**.

| Code | Description | Sample Quote |
|---|---|---|
| Barriers to partner buy-in | Challenges interviewees mention that impede or hinder the full execution of the system conditions assessment tool | I recognize that the conditions are through our lens as a professional learning provider, and that a system leader's lens is wider than that. They're thinking about budget. They're thinking about human capital. They're thinking about talent pipelines. They're thinking about all sorts of – bussing. And so you know, while I feel like this captures the work Leading Educators is equipped to do at the system, I could see a system leader saying but this is like only helping me look at 2/3 of my job or ½ of my job, and so should we actually down the line partner with another org who does more around stat – like a TNGP who does all the human capital stuff, or an ERS who does all the resourcing, budgeting stuff, to make a broader snapshot tool that would be like what does it mean to have a functioning system, and then Leading Educators really zeroes in on these couple things that are about professional learning, whereas other partners could help you with other facets of the system. |
| Recommendations | Interviewees offer suggestions of how the system conditions assessment tool might be used more effectively to support district partners in their action planning | I think just in general as a Leading Educators thing is that we have systems conditions, we have the school conditions, we have teaching for equity framework, we have the teaching for equity classroom look through. All of these things (laughs) should link together. Like you should be able to clearly be able to say the systems conditions connects here in the teaching for equity framework. You know, like if we can't see that ourselves, all we're doing is overloading partners with pieces |
| Tool Adjustments | Changes the interviewee would make to the system conditions assessment tool if they were able to adjust it. | I've definitely heard that feedback from people. I do think shorter is better. Like if we can find the minimum viable set of conditions that capture variation that get to the highest points, like if there are opportunities to strip back I always think we should take them. Staff are working on creating a short list version right now that is going to be – I think we're aiming for like 20 indicators total instead of the 36. But we did just check. It takes people on average like – I can't remember the exact number. It's like 10 to 15 minutes to do it start to finish, so it really is a pretty short assessment, even when people do it in full. I think it does a pretty great job overall. I would say the two places |

| | | |
|---|---|---|
| | | where I have questions or like see as opportunities for improvement down the line, one is I think – so it's designed as a survey, a perception survey. I think there are some indicators that we could assess in a different way that could help us shorten the survey. |
| Tool description | Interviewees articulation of how they would describe the system conditions assessment tool to an external stakeholder | I would say these are the things that need to be in place for a school for a school system to get like return on investment from professional learning. |
| System Conditions uses | References to how the individual is currently using or might use the system conditions assessment tool | I want to support my partner in better connecting what's happening at the school level with the network level. [inaudible 10:50] just sort of put our heads together around what would that look like, what resources we have at our disposal, what resources do we not have at our disposal, etc. |
| Alignment | Interviewee references the system conditions assessment tool as a means of determining if the awareness and perceptions are aligned in the system. | I used it to sort of interview one of our partners with Oakland Unified School District and found that it was really useful to go through the questions with a partner because they were able to provide so much context and information to help us understand the nuances of like why some indicators might be in place or why some people might perceive some indicators to be in place or not. That really opened my eyes to the idea of its value is not only in assessment but as a way of revealing gaps or a lack of consensus, and that it could be like powerful if you had several stakeholders grade sort of the same indicators. Rather than averaging them, you actually showed them, you know, if you were a principal supervisor, you're likely to score this a two, and if you're a central office administrator you're likely to score this a four, which I thought there was real power in sort of using it to find those gaps. |
| Data and insights | Gather information on the most impactful conditions in order to direct future interventions more strategically | Once we use the tool more and have more – have more information about it, then we can pull up on insights that like are going to be really helpful. |
| Show progress and growth | Interviewee references the system conditions assessment tool as a means for continuously measuring progress on system condition goals and initiatives | I would prioritize first and foremost is for it to be a strong tool to drive continuous improvement, to drive goal setting, to inform actions. But I do think that there is a real value in being able to say this is where we started, and this is where we ended. Look at this. It's amazing. And like I would never want it – I think we will fail if we see it as only an accountability measure, and I've never seen us use it in an accountability way. That said, we like hire high performing people (laughs) who have come from schools where they've been really successful teachers, and so I do think a lot of people in education in general, but especially at our organization, come with a lens of like quantitative data for accountability, and so that's something that I feel like is a constant mindset that we need to pay attention to and try and disrupt to say like first and foremost and most importantly it's for continuous improvement, goal setting growth, and it's our responsibility to our partners. They're investing a lot of time and money into the work that we're doing, and we want to be able to know that that investment is worth it, because they could be paying for lots of different things for kids, and so we only want to be taking time and resources if we know it's paying off. |
| Internal action planning | The interviewee uses the system conditions assessment tool as a framework or guide for district partner engagement. | It's actually like a planning tool. It's a way of thinking about conditions so we internally can prioritize and communicate about conditions, but also with our clients, not just like the assessment. So have led eight 90 minute sessions with other manager director of networks and have provided three and five and follow up individual coaching to several managing directors around not only their use and understanding of the framework, but also helping them choose a specific indicator to work toward, basically, you know |
| Needs assessment | System conditions assessment serves as a tool for determining current strengths and weaknesses of the system | And we developed at the system level ~~a~~an assessment tool that allows system leaders to self-assess on those conditions in order to identify strengths and growth areas to prioritize |
| What it gets right | The interviewee's articulation of what the system condition assessment tool does well. | I think it gets right the fact that like it is relatively robust, right? Like it would be disingenuous to be like there are three conditions. Like people want really straight forward, simple things, where it's like there's three conditions, the three indicators and this gives you your snapshot. So I think like the fact that it is larger and a little bit more complex I think reflects the complexity of the work. I think the fact that there's like multiple indicators under kind of a high level focus is also really helpful, because there's like varying things that we might see or things that might tell us like, oh, we're making some progress, but there are other places that things need to be in place, and I just think I've – like in some of the guidance and the fact that there isn't like a right answer, per se, I think again there's also just that piece of like there is a clear perspective held, but it isn't saying that like on each of these you will always have to like score at a certain point where like an assessment again can make it feel like there's just either one right way to do this or like you just – your goal is to always score like |

| | |
|---|---|
| | 100%. Like no system is going to do that, and so I think there is something about the way it's like developed and even. I think that folks have been using it. That helps like push back a little bit on that idea that like, oh, if you just do these three things you'll be good to go and you'll get like 100% on the assignment versus like it is meant to be informative and to like kind of help drive from my vantage point like conversation and then also the strategy used to support the creation of those like conditions. |

***Table 2:*** *Excerpted Qualitative Analysis Codebook*

I used the qualitative software Dedoose for more efficient and effective data analysis. I uploaded the transcripts into the software and established descriptors for each transcript. I identified the following descriptors as relevant based on my interview pool: pseudonym, sex, race, tenure at LE, and LE team. I coded all of the transcripts using the first draft of my codebook, and I made some minor adjustments to the codebook as I coded. The exercise of coding permitted an enhanced analysis of patterns within the responses of interviewees and served as a reminder of the content of the first interviews conducted. After coding, I revisited each of my research questions and tried to determine which codes and data sets would be most beneficial for answering each of the questions, both directly and indirectly.

## FINDINGS

**Research Question 1:** How can LE generate partner district buy-in when conducting the system conditions assessment tool?

**Finding 1**—Due to limited implementation of the system conditions assessment tool, I was unable to identify successful practices of generating partner district buy-in." Interviewees articulated barriers in the internal and external environment preventing them from engaging partner districts that, if addressed, could contribute to broader implementation.

> We did not have super high engagement in the survey this past year. And I can't really speak to why. I don't know if it's just like the timing of the year that we administered it was kind of busy, kind of – we didn't do a good enough job of introducing like the why behind it and what we were going to use it for, and those could all be possibilities.

Across the interviews and different teams, there were a limited number of concrete examples of the implementation of the system conditions assessment tool as designed. At present, LE has approximately 16 active district partnerships, and interviewees shared details of the use of the tool in Tulsa, Baltimore, and Oakland. In cases where the tool was used, the interviewees mentioned challenges with its application, including technological difficulties completing the survey, low response rates, and/or significant modifications to the system conditions assessment tool during implementation.

Based on this common finding in the interviews, I asked the interviewees to share what was preventing them from using the system conditions assessment with district partners. This type of probing follow-up question was used in all interviews. The majority of responses pointed to perceived barriers to implementation, which included uncertainty of how to accessibly

communicate the scope and purpose of the tool, lack of confidence in the skills and expertise in all of the domains the tool captures, concern of overwhelming district partners in times of great challenge, and balancing this tool among LE's other tools and the tools districts already have.

Although the interviewees mentioned numerous barriers, when asked about the potential of deriving value from the system conditions assessment tool, they largely viewed its potential favorably. Many participants referenced their own experiences as leaders in the K-12 space and the difficulties of setting priorities and aligning teams during intense change processes, challenges they hypothesized the system conditions assessment tool could alleviate. They also suggested that the tool could serve to demonstrate continuous improvement, improve the efficacy of their partnerships, support internal action planning, and identify needs.

**Research Question 2:** How can LE implement a process that streamlines the system conditions assessment's execution?

**Finding 2**—Interviewees offered suggestions for embedding the system conditions assessment tool at all stages of partnership with partner districts. Additionally, interviewees presented possible solutions for increasing the confidence of LE staff in their skillset to successfully support district partners in developing system conditions.

> I think at Leading Educators we're really good about creating assessment tools, but we don't start with the implementation process. So we had the tool, but we also don't talk about how might we use this or what need is this filling, and so sometimes I think there is a disconnect between the creation of a tool and then those of us who like have to enact something with partners.

All interviewees were asked for recommendations on how the system conditions assessment tool's execution might be improved. As I expected, recommendations varied in large part due to the particular focus of the interviewee's team within the organizational structure of LE. I grouped their responses as they related specifically to tool adjustments, tool reframing, streamlining and execution, and training and support for tool execution. By and large, interviewees shared agreement that the system conditions assessment tool was complete, captured well the complexity of systems work, and was an important area of attention for the organization moving forward. As a result, recommendations were related less to *what* the system conditions are and more about *how* to most effectively implement the system conditions assessment tool.

Although limited, the adjustments to the tool that surfaced in the data collection process included the possibility of creating a short-list version of the system conditions assessment tool. LE leadership shared that this was in development and anticipates a tool with 20 indicators, as opposed to the 36 indicators in the current version. Additionally, interviewees suggested that the tool contain linked-in resources to case studies; sample agendas for facilitating conversations with district partners; definitions of key terminology; the vision for student achievement data to include anti-racism, equity, and well-being; and the possibility of prioritizing subsections of the tool depending on district needs.

As part of the interview protocol, interviewees had the opportunity to share their perceptions of the common understanding of the system conditions assessment tool within their work teams and to describe the training and support they had received from LE. Interviewees recognized the efforts of LE, in particular the data evaluation team, to explain what the system conditions assessment tool is and how it is intended to be used. They also noted they were

confident that they could get support, if necessary, from a member of the data and evaluation team. Interviewees who had previously participated in trainings suggested that future workshops should center on implementation. For example, one interviewee shared,

> I think we need to learn how to use it as a tool with partners. Like I think we need to, you know, use it as like part of a continuous improvement process. You know, we took the assessment. This is what it revealed to us. Like now we're going to do something about that. Now we're going to come back to the tool and reflect on like did it improve, how did it improve, what are we going to codify and build sustainability around, what did we learn wasn't useful and so that we're not going to replicate, and then like let's go to the next thing. (Seabury Ave 2)

However, not all interviewees were members of teams that participated in training on the system conditions assessment tool. The interviewees on teams that had received limited training advocated for the expansion of the learning opportunities to include common learning spaces for their positions and/or an intentional system for ensuring that the learning at the level of the managing directors trickles down to members of their teams.

**Research Question 3:** How can the most impactful system conditions be used to create an action plan with the LE partner districts?

**Finding 3**— At the time of the interviews, there was insufficient data to be able to adequately answer this question because the implementation of the system conditions assessment tool has been too limited. However, there was internal investment in the insights the system conditions assessment tool could eventually provide.

> Once we use the tool more and have more – have more information about it, then we can pull up on insights that like are going to be really helpful…We can kind of look at the

> correlations, and that I think is the place where getting back to what I said earlier like people feeling unsure of what they should do next, like the data can help tell us some of that stuff. I think what's going to come out of the insights is like an if then, if then, like conditional pathways that look different based on where a system's starting, and I think that's going to be really cool and also kind of complicated because systems are so complex, and big, and there's lots of factors. So I think it will end up being like an if you're in this profile, maybe try that. If you're in this profile, maybe try this, and that will look a little different.

Prior to the development of the system conditions assessment tool, LE created the school conditions assessment tool. This tool has been widely used within their partnerships and is considered one of their most popular data tools. While in the stage of identifying a problem of practice, representatives from the data and evaluation team shared that they had successfully used their existing data from the school conditions assessment to identify the most impactful school conditions through the correlation of student achievement and school conditions assessment data. The intention is to replicate a similar process with the system conditions assessment tool; however, with the COVID-19 pandemic and the challenges surrounding the implementation of the system conditions assessment tool, there is insufficient data at present to complete a correlation analysis of appropriate rigor.

Despite the current challenges, it remains a finding that there is personal and institutional investment in the possibilities these insights can provide to LE. Interviewees mentioned potential benefits of these insights for improving the efficacy of their work with district partners, allowing them to more intentionally prioritize. They also noted that these insights will enrich the narrative of LE's theory of change for new partners and donors.

## RECOMMENDATIONS

The findings of this quality improvement study affirm the hypothesis of my partner organization that the system conditions assessment's use has been limited up until this point in time. The findings point to challenges within the internal system of LE as well as the internal forces within partner districts that are preventing the system conditions assessment tool's implementation with fidelity. As a result, rather than asking how to generate buy-in with partner districts, the question becomes "How can we build internal investment in the system conditions assessment tool and increase the confidence in the abilities and skillsets of those responsible for its implementation?"

### Recommendation 1—Build LE's internal capacity to support the system conditions assessment tool implementation.

Interviewees suggested that there is a trend in LE of developing measurement and assessment tools without the accompanying overarching framework and programming resources. In the absence of a programming strategy, the assessment tool fills the void. The purpose of the tool may be different depending of the internal LE team and/or the stage of partnership with a partner district; however, the discussion and clarification of these nuances can further support staff to develop their conceptual understanding. Interviewees suggested that there is a trend in LE of developing measurement and assessment tools without the accompanying overarching framework and programming resources. In the absence of a programming strategy, the assessment tool fills the void. The purpose of the tool may be different depending on the internal LE team and/or the stage of partnership with a partner district; however, the discussion and clarification of these nuances can further support staff to develop their conceptual understanding. As a result, a first step in building capacity is to clarify the purpose of the system conditions assessment tool and provide guidance for when whole tool vs. partial tool use might make sense.

The most often cited barrier to implementing the system conditions assessment tool was concern regarding the knowledge, expertise, and resources of LE staff in each of the areas the assessment evaluates. As on interviewee shared,

> I'm not equipped to help them develop all of those areas. So I have a hard time from like an integrity standpoint highlighting something that a district needs to improve if I can't also help them improve it. Or at least to direct them to a trusted partner who can help them improve that. I don't want to walk in and say like, hey, that's broken. I don't know how to fix it, but you should figure it out.

In other words, LE staff are hesitant to apply an assessment that could produce a result for which they are not equipped to provide support to a district partner. LE would be well served to identify the specific areas of the system conditions assessment tool that are generating this hesitancy. Upon their identification, LE leadership should devise potential solutions for these knowledge gaps. These could be mitigated through leveraging of the collective knowledge within the larger LE organization, internal training opportunities to "coach up" staff members, targeted resources aligned to the areas of need, and strategic partnerships with other organizations that have a high level of expertise in the identified area.

Another common barrier to implementing the system conditions assessment tool is the belief that the partner district has other tools they are already invested in using that may come into conflict or overlap with the system conditions assessment tool. The spirit of this recommendation is to provide specific guidance to managers of networks to discern whether a district-specific tool is actually providing a view of the system and achieving a similar end to the system conditions assessment tool. If, in the final assessment, the partner district does not have a tool that offers these insights, managers of networks may need support in communicating how

the system conditions assessment tool is different and a value add for their existing data tools. In supporting LE staff to effectively assess the external environment of district partners, LE staff will build disciplined inquiry practices and systems thinking, and by extension, generate investment in LE's system conditions assessment tool.

**Recommendation 1.1—Model best practices of professional learning with internal learning structures.** Expand the learning opportunities surrounding the system conditions assessment tool to include other roles that supports its implementation.

LE is an organization at the forefront of professional learning solutions for K-12 districts across the country; however, LE has its own internal learning structures. While these structures are effectively achieving the results they were designed to accomplish, it would be beneficial to extend professional learning to other positions and teams that are responsible for presenting the system conditions assessment to potential clients and then making sense of the results for funders. Also, turnkey structures should be in place to replicate and share learning at one level of the organizational hierarchy with other collaborators in that team who may not have the opportunity to attend learning meetings.

**Recommendation 2—Embed the system conditions assessment tool at all stages of partnership and plan for implementation.**

The system conditions assessment tool as designed is intended to be administered to existing LE partner districts actively engaged in an ongoing partnership. There are opportunities to infuse thinking and awareness around system conditions at earlier stages of partnership and as part of long-term sustainability after partnerships come to an official end. During the exploration phase of a new partnership, the onboarding process and the development of the scope of work could be aligned with the system conditions assessment tool.

In order to plan for implementation, LE team composition and structures should include "owners" of data tools who are assigned to projects and who manage these tools at the different stages of partnership. Current LE organizational structure has an internal data and evaluation team with members who specialize in different data and evaluation tools and act as their owners. When staff engaging in the different LE partnerships need support, they seek guidance from the owner of the specific tool. This recommendation aims to empower one member of either the data and evaluation team or the in-context team to serve as the owner of the data tools. This may sacrifice the value of a team member possessing highly specialized expertise in a specific tool itself, but affords greater context knowledge and facilitates consistent and coherent communication about how the data tools complement and speak to one another. This ultimately leads to a coherent improvement strategy and data collection strategy.

In embedding the system conditions assessment tool at all stages of partnership, there is an opportunity to broaden the conceptualization of the tool beyond a survey of perceptions of district leadership.

The system conditions assessment attempts to synthesize a great deal of information regarding the system in a manner that is clear and accessible. In interviews, interviewees pointed out that the current assessment relies on the perceptions of a few district leaders and may be missing an opportunity to involve additional stakeholder perspectives. This would ideally include building-level leadership, teachers, students, and families. Capturing the views and feedback of these additional stakeholder groups does not necessarily require that they complete the survey, but rather could use other data points from existing data sources to provide supporting evidence. Evaluating these possible minor modifications to the prescribed ways of using the system conditions assessment tool could increase its impact and reach.

**Recommendation 3—Collect additional data from the implementation of the system conditions assessment tool** to use these data to analyze and develop insights to target network support, articulate connections across LE tools, and generate new product offerings.

The model for correlating conditions assessment data to student achievement exists within the organization because of the experience with the school conditions assessment. However, in order to engage in this analysis for the system conditions assessment tool, it must be administered with fidelity to its design in multiple contexts. As the available data increase, the potential for analysis and usable insights will grow. While more data are collected, it would be advisable for LE to articulate the coherence and connection across the different LE tools. This would assist collaborators in making sense of how one high-impact condition generates movement in other areas of LE's work. The ability of staff to use the data and insights from the system conditions assessment tool is dependent on their explicit understanding of how each tool communicates and supports the other, and how they work together to support the overall mission and vision of the organization's theory of change. As new tools and frameworks are released—such as LE's teaching for equity framework—and join the existing system conditions and school conditions assessments, internal stakeholders need guidance on how these tools work together and how to communicate their purpose to district partners.

**Recommendation 3.1—Envision "System Conditions Support" as an LE product**.

The typical program model of LE is a comprehensive multiyear endeavor to improve the efficacy of professional learning. However, there may be a niche for a standalone system conditions offering that would include assessment of the conditions, a comprehensive report, and a consultation with recommendations and a collaborative plan of action. This would be a

modular and more affordable offering that could create greater awareness of LE's system solutions and prepare partners for longer term partnerships.

## CONCLUSION

LE's push toward improving system conditions is an emerging area of research and professional practice, making it no surprise that there is a significant learning curve for all involved. LE and its team members are committed to critically looking at how to move the use of the system conditions assessment tool forward in service of their mission. It is my intention that this quality improvement study's findings on the current implementation of the system conditions assessment tool and the related recommendations can serve as one input for improving their implementation in service of disruption of inequities in education.

## REFERENCES


Avalos, B. (2011). Teacher professional development in Teaching and Teacher Education over ten years. Teaching and Teacher Education, 27(1), 10–20. https://doi.org/10.1016/j.tate.2010.08.007

Bolman, L. G., & Deal, T. E. (1999). 4 steps to keeping change efforts heading in the right direction. The Journal for Quality & Participation, 22(3), 6–11.

Bonilla-Silva, E. (2006). Racism without racists: Color-blind racism and the persistence of racial inequality in the United States (2nd ed.). Rowman & Littlefield.

Briscoe, F. M., Khalifa, M. A. (2015). 'That racism thing': A critical race discourse analysis of a conflict over the proposed closure of a black high school. Race Ethnicity and Education, 18(6), 739–763. https://doi-org.proxy.library.vanderbilt.edu/10.1080/13613324.2013.792798

Burke, W. W., & Litwin, G. H. (1992). A causal model of organizational performance and change. *Journal of Management*, *18*(3), 523–545. https://doi.org/10.1177/014920639201800306

Carr, J. F., & Harris, D. E. (2001). *Succeeding with standards [electronic resource] : linking curriculum assessment, and action planning / Judy F. Carr, Douglas E. Harris.* Association for Supervision & Curriculum Development.

Chevalier, R. (2003). Updating the behavior engineering model. Performance Improvement, 42(5), 8–14. https://doi.org/10.1002/ pfi.4930420504.

Cunningham, C. (2016). *Systems theory for pragmatic schooling: Toward principles of democratic education*. Palgrave Pivot.

Easton, L. B. (2008). From professional development to professional learning. Phi Delta Kappan, 89(10), 755-759.

Fullan, M. (2007a). Change the terms for teacher learning. Journal of Staff Development, 28(3), 35-36.

Garet, M. S., Porter, A. C., Desimone, L., Birman, B. F., & Yoon, K. S. (2001). What makes professional development effective? Results from a national sample of teachers. *American Educational Research Journal*, *38*(4), 915–945. https://doi.org/10.3102/00028312038004915

Garvey, D.L., & Brown, L. (2021, June 7). Problem of Practice Inquiry 1. personal.

Garvey, D. L., & Tasker, T. (2021, July 16). Problem of Practice Inquiry 2. personal.

Honig, M. I., & Honsa, A. (2020). Systems-Focused Equity Leadership Learning: Shifting Practice Through Practice. Journal of Research on Leadership Education, 15(3), 192–209. https://doi.org/10.1177/1942775120936303

Katz, D., & Kahn, R. L. (1978). *The social psychology of organizations: 2nd ed*. Wiley.

Khalifa, M. A., Gooden, M. A., Davis, J. E. (2016). Culturally responsive school leadership: A synthesis of the literature. Review of Educational Research, 86(4), 1272–1311. https://doi-org.proxy.library.vanderbilt.edu/10.3102/0034654316630383

Leading Educators. (n.d.a). Conditions. https://leadingeducators.org/results/conditions/

Leading Educators. (n.d.b). Knowledge and Beliefs. https://leadingeducators.org/results/knowledge-beliefs/

Leading Educators. (n.d.c). Lasting Impact. https://leadingeducators.org/results/

Leading Educators. (n.d.d). Our Story. https://leadingeducators.org/about-us/our-story/

Leading Educators. (n.d.e). Our Supporters. https://leadingeducators.org/about-us/our-supporters/

Leading Educators. (n.d.f). Our Team. https://leadingeducators.org/about-us/our-team/

Leading Educators. (2019). 2019-2020 School Conditions Assessment

Leading Educators. (2021). Program Standards Revised Overview

Leading Educators. (n.d.g). Support that Works. https://leadingeducators.org/our-work/how-it-works/

Leading Educators. (n.d.h). Student Outcomes.

https://leadingeducators.org/results/student-outcomes/

Leading Educators. (2021). FY21 System Conditions Assessment,Version 7.0.

Leading Educators. (n.d.i). Teaching for Equity.

https://leadingeducators.org/equity/

Lee, M., Ryoo, J. H., & Walker, A. (2021). School Principals' time use for interaction with INDIVIDUAL Students: Macro CONTEXTS, Organizational conditions, and student outcomes. *American Journal of Education*, *127*(2), 303–344. https://doi.org/10.1086/712174

Opfer, V., Kaufman, J., & Thompson, L. (2016). Implementation of K--12 state standards for mathematics and English language arts and literacy: Findings from the American teacher panel. https://doi.org/10.7249/rr1529

Schein, E. (1996). Leadership and organizational culture. In F. Hesselbein, M. Goldsmith, & R. Beckhard (Eds.), *The leader of the future: New visions, strategies, and practices for the next era* (pp. 59–69). San Francisco, CA: Jossey-Bass.

Schmoker M. Results: the Key to Continuous School Improvement. NASSP Bulletin. 2000;84(615):120-122. doi:10.1177/019263650008461515

Sefa, D. G. J. (2003). *Anti-racism education: Theory and practice*. Fernwood.

Senge, P. (1996). Leading learning organizations: The bold, the powerful, and the invisible. In F. Hesselbein, M. Goldsmith, & R. Beckhard (Eds.), *The leader of the future: New visions, strategies, and practices for the next era* (pp. 41–57). San Francisco, CA: Jossey-Bass.

Smylie, M. A. (1988). The enhancement function of staff development: Organizational and psychological antecedents to individual teacher change. American Educational Research Journal, 25, 1-30.

Zehetmeier, S., & Krainer, K. (2011). Ways of promoting the sustainability of mathematics teachers' professional development. *ZDM*, *43*(6-7), 875–887. https://doi.org/10.1007/s11858-011-0358-x

## Appendix 1

LE DATA AND STRATEGY/PROGRAMMING TEAM, INTERVIEW EMAIL, PROTOCOL AND QUESTIONS

Dear [Name]:

I hope this email finds you well. As Dr. Brown has described, my study seeks to understand how Leading Educators can streamline the execution of the system conditions assessment with district partners. Specifically, I will focus on how the most impactful system conditions can be used to create action plans and how to generate partner district buy-in when conducting the assessment tool.

Given your first-hand knowledge of the system conditions assessment tool and its use, I am hoping to set up an interview with you to learn more about your experiences. I anticipate that the interview will take approximately sixty (60) minutes and can be conducted via Zoom.

This study has been approved by the Institutional Review Board at Vanderbilt University and your participation will be kept completely anonymous. I understand how busy schedules are right now and really appreciate your willingness to share your insights with me.

If you have any questions about the project, please feel free to contact me via email at daniel.l.garvey@vanderbilt.edu

Thank you again for your consideration.

Sincerely,

Daniel L. Garvey

Vanderbilt University

PROTOCOL

Participants: Leading Educators Programming Personnel

Good Afternoon (Name). I sincerely appreciate your taking time to participate in my research study. As you know, I am a doctoral student at Vanderbilt University and this research study is the final component of our three-year program - the Capstone Project. I have been working closely with Dr. Brown and staff on the data and strategy team over the last year to conduct research on the system conditions assessment tool. We are interested in learning how its impact can be maximized. In the hour or so we have together, I look forward to hearing your thoughts and suggestions in that respect.

To just give you a brief overview, I intend to ask you some questions to better understand how we might improve the execution of the system conditions assessment tool. You were selected because of your end-user perspective on the system conditions assessment tool in your role as a manager of partner district relationships.

I do want to mention that I will be recording the session because I don't want to miss any of your comments. My final study will be shared with Leading Educators, with the ultimate objective of increasing the impact of the system conditions assessment tool; however, please know that I will not use your name in my reports - so you may be assured of anonymity.

QUESTIONS

1. What has been your experience with the system conditions assessment tool since its creation?

2. How would you describe the system conditions assessment tool to someone else?

3. Given the competing priorities you manage with district partners, what value do you and/or your district partners derive from the system conditions assessment tool?

4. Is there a common understanding about the system conditions assessment tool and its execution across the teams at Leading Educators involved in its use? (why or why not?)

> PROBE: Has the data and strategy team adequately trained you on the use of the system conditions assessment tool?

5. When thinking about your action planning work with district partners, can you describe how you use the system conditions assessment tool?

6. We have heard from stakeholders that it might be helpful for the system conditions assessment tool to be paired down. Would you agree or disagree? (Why?)

7. What are your recommendations on how the system conditions assessment tool might be used more effectively to support district partners in their action planning?

8. Is there anything else you would like to add in regards to what we've discussed today?

That concludes my questions. Thank you, again, for your time and for sharing your insights with me. This type of feedback is very helpful, thank you again.