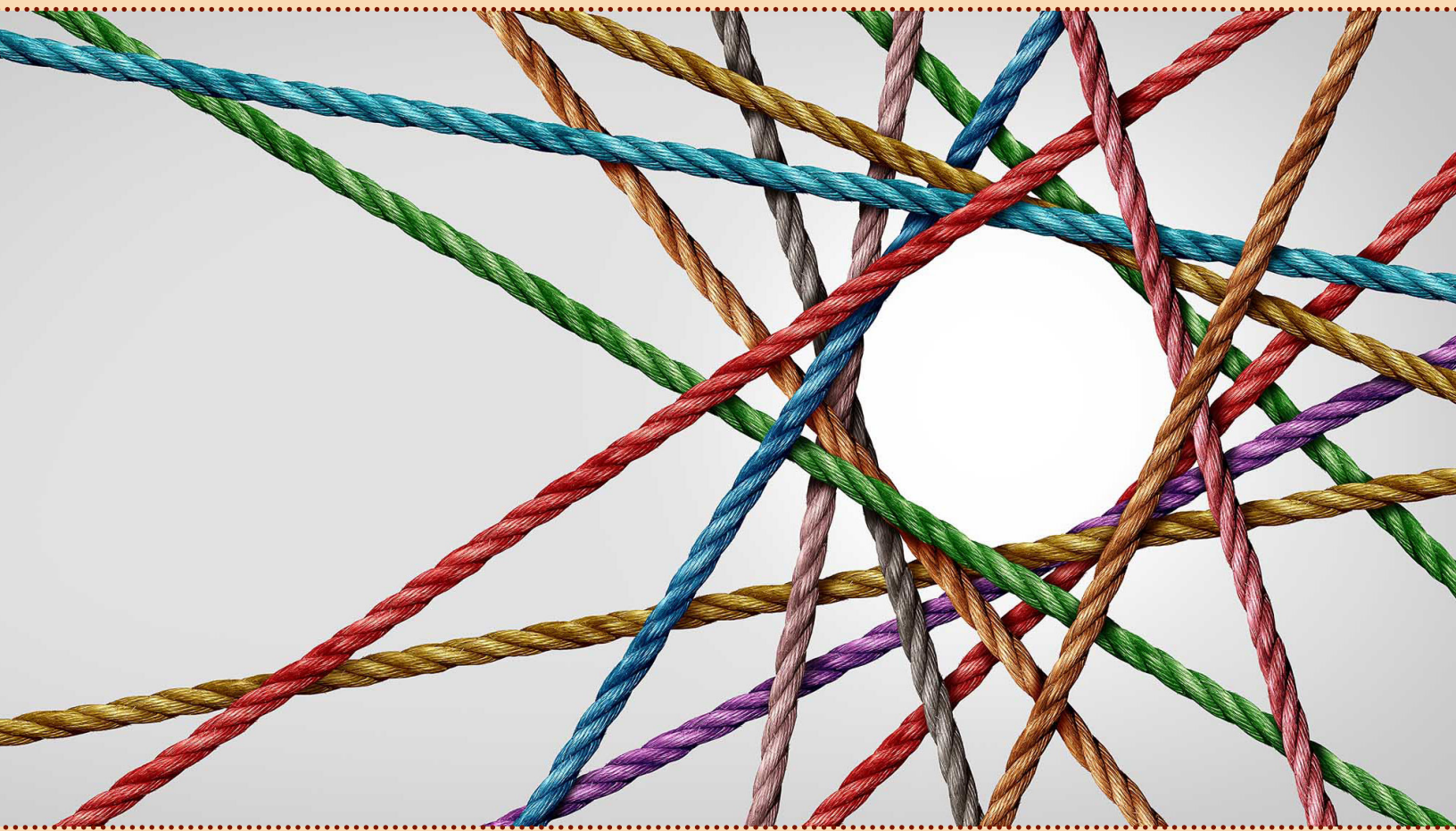


Beyond Alignment: Striving for Coherence among Technical Assistance Organizations, Schools, and Districts

By Ann Jaquith and Rosa Chavez





Stanford Center for Opportunity Policy in Education (SCOPE) fosters research, policy, and practice to advance high-quality, equitable education systems in the United States and internationally.

Copyright © 2020 Stanford Center for Opportunity Policy in Education

Cover photo by Lightspring/Shutterstock.com

Suggested Citation:

Jaquith, A. and Chavez, R. (2020). *Beyond Alignment: Striving for Coherence among Technical Assistance Organizations, Schools, and Districts*. Stanford Center for Opportunity Policy in Education.

Stanford Center for Opportunity Policy in Education

<https://edpolicy.stanford.edu>

@scope_stanford



Acknowledgements

This paper was prepared with the generous support of the Stuart Foundation. We gratefully acknowledge their support as well as the interest, support, and openness of the multiple technical assistance providers who willingly shared their work with us and made this study possible. We would also like to thank the students, teachers, coaches, principals, and district administrators we spoke with and observed who generously contributed their time to this project and willingly answered all our questions. We learned a great deal with and from all the project participants. All research involves the work of many people, and we appreciate the work of Jon Snyder who spent countless hours discussing our project work from its earliest stages and who provided insightful feedback on many versions of this paper; the careful copyediting and close reading of this text by Sonya Keller whose efforts have strengthened this paper in numerous ways; and the careful layout and design work of Laura Garritano. This research was conducted independently by the Stanford Center for Opportunity Policy in Education and does not represent the views of the sponsors.

Abstract

Given the common problem of incoherence in district reform efforts, this qualitative study sought to understand what conditions enable (and/or constrain) the efforts of Technical Assistance Organizations (TAOs) to align their products and services with each other and with the specific goals of a district. This paper explores the complexity of TAOs working in partnership with each other and with districts. It describes the types of practices and structures that are useful in connecting technical assistance services with the specific strengths, interests, and needs of the people and the sites where TAOs work as well as the nature of the relationships that must develop between and among TAOs and district personnel. In addition, the analysis explores the roles and responsibilities that a district can assume to create the conditions for more effective use of the products and services that TAOs provide.

Contents

Introduction.....	1
The Participating Organizations and Their Contexts.....	2
The Proposed Project of the Aligned Partners.....	2
Data Collection and Methods.....	3
Background.....	5
Project Planning.....	5
The Aligned Partners Summer Professional Development.....	6
The Follow-Up Sessions.....	7
Results of the Aligned Partners Professional Development.....	9
The Influence of Professional Development on Classroom Instruction.....	9
The Use of Project-Based Teaching and Performance Assessment.....	9
Making Sense of What Impedes and Assists Coherence.....	16
Examining the Aligned Partners' Efforts to Collaborate on Creating Coherence...16	
Conceptualizing Different Technical Assistance Ideologies and Their Influences...21	
Connecting Project-Based Teaching and Performance Assessment to Defenses of Learning.....	25
Conclusion.....	27
Endnotes.....	29
Appendix A: Project Organizations.....	30
Appendix B: Data and Methods.....	32
Appendix C: Grant Activity and Project Timeline.....	35
Appendix D: Four "I's" Framework.....	36

Introduction

Teaching often differs considerably between teachers and classrooms. Different instructional approaches to teaching the same subject matter and to assessing student performance are commonplace in schools and between schools in the same district. One reason for this instructional incoherence is districts' lack of incentives to evaluate and manage their resources—like money, time, and personnel—in service of a coherent instructional agenda. So, “the money [districts] spend on instruction tends to be compartmentalized to meet specific external demands and specific incremental decisions at the system and school levels.”¹ Another reason is that schools and school systems adopt a variety of programs and innovations in response to a “steady diet of quick fixes.”² The compartmentalizing of efforts to improve instruction in practice means multiple improvement projects are underway in a district at any given time. This reality led McLaughlin and Mitra (2001) to liken district reform efforts to a “pharmacy, with multiple and often incompatible ‘prescriptions’ at work simultaneously.”³ These prescriptions, which are intended to advance some sort of improvement, often involve the assistance of others who are external to the district—such as technical assistance organizations (TAOs), researchers, intermediaries, community agencies, institutes of higher education, consultants, and/or philanthropic organizations. Having many instructional improvement efforts underway at once, involving different organizations, contributes to incoherence.

Nevertheless, organizations like TAOs can help improve teaching and learning in districts. They provide specialized knowledge, skills, and/or expertise. TAOs can be for-profit or non-profit and vary significantly in their size and scope of work. Typically, when several TAOs work in the same district (even with the same educators), they work separately and compete for the scarce time and attention of educators. In addition, the precious resource of educators' time is partially controlled by district administrators who are expected to coordinate, integrate, and cohere the various strands of technical assistance provided at any given point in time.

The coordination and integration of technical assistance is challenging—a challenge that may not be a district priority or be well performed. Coordinating these separate initiatives is difficult because of different timelines, budgets, expectations, and champions within the district. Initiatives are usually led or overseen by different people located in different departments or levels of the system with differing degrees of authority and different goals. Even when initiatives are complementary, initiative leaders might not have incentives to coordinate their activities and might lack the information needed to integrate them.

This paper investigates an initiative that sought to increase coherence within a district. The initiative involved three different, but conceptually complementary, TAOs who worked in the same district with increasing frequency, were familiar with each

other's work, and sometimes received support from the same philanthropic organizations. The particular project on which this paper focuses involved all three TAOs. They were supported by one foundation for the purposes of aligning their products and services to each other to create a more coherent service offering and to align their services to the strengths, interests, and needs of a specific school district. Our analysis explores the successes and challenges of the TAOs' efforts to collaborate with each other and with the district and reveals some of the reasons why developing a coherent approach to instructional improvement is so challenging. Based on this analysis, we offer some suggestions for TAOs and districts to consider when determining whether, when, and how to work together.

The Participating Organizations and Their Contexts

In total, there were six organizations involved in the Aligned Partners Project. These were the Foundation, the district (HGUSD), the three TAOs, and a research organization (the Stanford Center for Opportunity Policy in Education (SCOPE)).^a This paper is chiefly concerned with the district where the Aligned Partners Project was situated, the three TAOs that constituted the Aligned Partners, and the nature of the relationships that existed and developed among and between these four organizations.

Each TAO brought distinctive strengths and capacities to this project. The Teaching TAO had expertise in project-based teaching. The Assessment TAO had expertise in the development and implementation of performance assessments. The Leadership TAO had expertise in supporting the work of district leaders to develop career-integrated, interdisciplinary courses of study and it already had a grant from this Foundation to support HGUSD with other related initiatives.^b Recognizing the complexity of the project and its uncertainty for success, the Foundation funded SCOPE to provide formative information to the TAOs, district, and Foundation as the project unfolded.⁴

The Proposed Project of the Aligned Partners

Calling themselves the Aligned Partners, the Teaching TAO submitted a proposal to the Foundation on behalf of the three TAOs. They proposed to combine their unique areas of expertise in project-based teaching, performance assessment systems, and leadership development to support career-integrated, interdisciplinary

a. All organizations—other than SCOPE, who authored this paper—are given pseudonyms. This includes the school district, all schools, and all teachers referenced throughout the paper. For the TAOs, their pseudonyms are based on their chief project function (Assessment TAO, Leadership TAO, and Teaching TAO). When referring to the specific Foundation involved in the study, the word is capitalized.

b. See Appendix A for a brief description of the three TAOs and district context.

courses of study to create a coherent set of resources that would meet a district's needs for the following:

- a. Services that are *contextualized* for the district's specific strengths, interests, and needs;
- b. *Aligned* to the developmental realities of district sites and personnel;
- c. *Organized* in a coherent and measurable way; and
- d. *Designed* to raise the capacity of all district participants—despite differences in role, preparedness, conditions, and beliefs.⁵

The budget allocated resources to each TAO for their time and efforts and to the district to pay for expenses, such as the cost of teacher substitutes.

The Aligned Partners' proposal, which sought alignment of tools and resources to aid district coherence, seemed promising. In retrospect, the proposal's aims appear optimistic about what could be achieved. Designing products and services to raise the capacity of *all* participants regardless of their role, background, or beliefs, for example, is a tall order, especially without knowing who the participants are. Furthermore, without identifying school sites and their specific strengths, interests, and needs in advance, the Aligned Partners' expectation to meet the developmental realities of district sites and their personnel appeared more aspirational than realistic. With hindsight, the lack of well-specified goals and the insufficient understanding of each TAO's strengths, interests, and needs became apparent.

Data Collection and Methods

Data for this study was collected in three phases over three years.^c The first phase of data collection occurred during the project planning phase (August 2016 to June 2017) and consisted of field notes, documents from Aligned Partners meetings, analytic memos, and interviews with district administrators and representatives of each TAO.^d Data collection was both planful and emergent.⁶ The analytic memos, written by the SCOPE team, were grounded in the data and highlighted emerging themes, questions, and observations that seemed particularly pertinent to the Aligned Partners' stated goals.

c. See Appendix B, Table B1: *Data Collected and Emergent Analyses*.

d. See Appendix C: *Grant Activity and Project Timeline*.

The second phase of data collection occurred during the professional development (PD) implementation phase (2017–2018) and consisted of field notes and documents collected during six days of PD sessions led by the Aligned Partners. We invited all 21 participating teachers who taught in three district-selected focal schools to join the study.^e Six teachers agreed to participate. The focal schools served large populations of low-income students and were among the lowest performing schools in the district. These schools were the designated recipients of the PD because the Assistant Superintendent thought they most needed the PD resources. Teacher interviews, classroom observations, and conversations with student groups were conducted twice in the six participating teachers' classrooms to see how teachers used the content of the professional development (i.e., project-based teaching and performance assessment tools and concepts) in their instruction. In order to obtain additional information about the school-level supports for teachers, we interviewed instructional coaches and other relevant school and district administrators.

Finally, the third phase of data collection occurred during the academic year following the Aligned Partners PD (2018–19). The focus of this phase of data collection was twofold. First, we wanted to understand better the events that led to the Foundation's decision to issue a grant to the Aligned Partners. We interviewed three Foundation personnel who were closely involved in the initial grant-making and oversight of the project to discuss the Foundation's aims for the project. We also interviewed executive leaders from each TAO about the genesis of the project. Second, we collected additional implementation data from one focal school where the principal established organizational supports to encourage teachers to use project-based teaching and performance assessments. We conducted follow-up interviews with teachers and administrators at this school. In May 2019, we also observed a dozen graduation defenses that occurred in front of four different panels at the focal high school in the study.

Data analysis was continuous and occurred as it was collected. Analysis was also recursive. For example, using Carol Weiss's Four "I's" of decision-making as an analytic lens, we re-analyzed data for instances where organizational interests, ideology, and information sharing occurred.⁷ This analytic lens and the creation of data displays helped illuminate the complex interplay among the partners' interests, ideologies, information-sharing behaviors, and the broader institutional environment.

e. See Appendix B, Tables B2 and B3 for a complete list of study participants.

Background

This paper first briefly describes the project planning phase where the TAOs developed a series of PD sessions. Then, we describe the content and structure of the PD days followed by the influences of that PD on teachers and principals who attended as evidenced by their use of project-based teaching and performance assessment practices in their classrooms and schools. Our analysis of the project and its effects focuses on the Aligned Partners' significant efforts to collaborate and align their products and services during the project planning. We examine decisions and actions that were made by the TAOs and the district and the consequences of those decisions. The discussion of how the knowledge and tools from the Aligned Partners PD was used by the district and focal school teachers and principals provides a way to understand the consequences of actions taken (or not) by the three TAOs and the district during the project.

Project Planning

Three full-day planning meetings among the TAOs were held to align their service offerings. At these meetings (August 2016; December 2016; & April 2017), the TAOs spent their time: (1) trying to better understand each other's approach to technical assistance, (2) refining their overall project goals, (3) determining how to align their service offerings in a manageable way, and (4) learning about the district. This process was iterative and challenging. The TAOs discovered that their understanding of each other's organizations and approach to technical assistance was more superficial than they thought. They also discovered that the district's interests and needs from this project were not entirely what they had assumed. Since the district was not viewed by the TAOs as a partner in this project but rather as the site where their aligned services would get tested, figuring out what the district's strengths, interests, and needs were—and how (if at all) to integrate these into the project—was a source of tension among the TAOs throughout the project.

In their first meeting in August 2016, the Assessment and Teaching TAOs learned of the district's new graduation policy—beginning in 2019, all seniors would create a portfolio and participate in a public defense of their learning. The portfolio and defense were meant to be a demonstration of student achievement as envisioned in the district's graduate profile. The TAOs also learned that the district had a different target group of teachers in mind to receive the Aligned Partners PD than the TAOs did. Thus, in the first planning meeting, a significant conflict arose between the Teaching TAO's primary project goal and the district's interest in the project. The district was interested in increasing the project-based teaching capacity and performance assessment capabilities of secondary teachers who did not teach in career-integrated programs. The TAOs were primarily interested in aligning their

services to better meet the needs of those teachers who taught in career-integrated courses of study.

In the third section of this paper, *Making Sense of What Impedes and Assists Coherence*, we examine how and to what extent the TAOs figured out how to satisfy their own organizational interests while also attending to the district's needs and goals. The complexities of these persistent tensions are explored. Our analysis aims to reveal what is required to develop a coherent approach to technical assistance rather than one that merely aligns and coordinates activities. We examine two dimensions of coherent technical assistance: (1) the extent to which the TAOs were able to co-produce a solution to resolve the problem of separate and unintegrated technical assistance offerings and (2) the extent to which the TAOs were able to “contextualize” their offerings to meet district needs.

The Aligned Partners Summer Professional Development

Middle school and high school teachers from nine schools attended the four days of the Aligned Partners PD. (See Table 1 on the following page.) Two TAOs led the PD, which centered on project-based teaching and performance assessments. The Assessment TAO led the first day of the PD and focused on HGUSD's graduate profile and how to assess the graduation outcomes using principles of performance assessment. This session was linked conceptually to the next three days of PD that were delivered by the Teaching TAO and focused on the principles of designing project-based units. These two TAOs connected the content of their respective sessions, which was something they had not done before. They showed participants that the principles of performance assessment are a useful way to measure what students actually learn through their participation in projects. Though their summer sessions were conceptually connected, they were delivered separately as two distinct modules.

This separation of content was noticeable. Each organization introduced its own planning template to workshop attendees rather than providing participants with one consistent template. Creating integrated materials would have meant the Aligned Partners had to negotiate proprietary issues. One member of the Teaching TAO characterized the PD module as a “3 + 1” and said, “It should not be that one [TAO] presents all one day and then we [another TAO] do the other three. It should be more integrated.”

Another challenge in the summer sessions was the TAOs had to figure out how to meet the diverse needs of attendees—those who did not teach in career-integrated programs, those who did, and those who were unfamiliar with HGUSD's graduation expectations and profile of a graduate. The TAOs responded to the difficulties this diversity of participants presented throughout the sessions.

Even though the PD modules were not fully integrated and the diverse needs of the learners presented facilitation challenges, participant feedback indicated that the summer PD was received positively. The comments of one principal who attended all four days of the summer PD captured some of the concerns HGUSD anticipated as well as the felt successes: “I appreciated the connection to the Graduate Profile so that [this initiative] doesn’t become another thing; I had to beg a particular teacher to come from [my school] so when I heard her share, ‘I’ve been to a lot of project-based teaching trainings and I didn’t think I’d learn anything new, but I am’...I was so happy. It is going well.” Although more would need to be done by both the district and the TAOs to achieve a coherent approach to technical assistance, instruction, and assessment, the initial efforts that the three TAOs made to connect their service offerings to each other as well as to learn about and connect to HGUSD’s context were considerable as well as recognized and appreciated by the HGUSD participants.

Table 1: Attendance Rates at Aligned Partners PD

PD sessions	Number of attendees	Number of attending schools
July 2017 (4-day session)	52	9
October 3, 2017 (1 day)	25	5
February 6, 2018 (1 day)	16	5

The Follow-Up Sessions

Attendance at the follow-up sessions declined precipitously, as Table 1 indicates. All study participants, however, attended the October session, and five of six study participants attended the February session. Both follow-up sessions were jointly led by the staff from the Teaching and Assessment TAOs. Having learned from the summer PD, by the time of the follow-up sessions, the TAOs had succeeded in developing a service offering that integrated project-based teaching *and* performance assessment. A member of the Assessment TAO said, “This is the first time [the Teaching and Assessment TAOs have] done something...that’s truly aligned.... We’re planning together. We’re implementing together. We’re delivering together.” This accomplishment is an example of a coherent technical assistance offering versus one that aligns and coordinates activities.

The three TAOs expected teachers to use project-based teaching and performance assessment in their classrooms. In the follow-up sessions, teachers were asked to describe their progress toward using the project-based teaching and performance

assessment methods. At the October session, teachers described various activities that they had led in the opening weeks of school to design and/or teach a project-based unit. A few teachers described having students create projects based upon real-world problems, such as “Trump’s decision to terminate DACA students” and current issues in science. One teacher wrote:

Students have been finding world issues in science and learning about how scientists in the field tackle those problems. Students are expected to think like those scientists and create a solution that could be applied to those problems....

In a reflection activity, teachers wrote headlines that captured what they were excited about going forward with project-based teaching (PBT). Examples included:

- *Positive outlook for project-based teaching*
- *PBT and [writer’s] workshop go hand-in-hand!*
- *PBT crushes traditional learning!*

The reflections of those who attended the follow-up session indicated an eagerness to develop project-based units of study for their students and overall conveyed a sense of optimism that they would be able to do so. Developing coherence between the work of the TAOs and the district—in other words, helping the district to develop a logical and consistent approach to support teachers in their use of project-based teaching and performance assessment—was an altogether different undertaking, one that ultimately proved beyond the capacity of the organizations involved in this project.

Results of the Aligned Partners Professional Development

The Influence of Professional Development on Classroom Instruction

Investments in professional development have a positive and sustained effect on teachers' practice when the schools and school systems in which the teachers work also have high levels of organizational capacity for continued improvement.⁸ In schools with low-capacity to help teachers integrate PD knowledge into their daily instruction, the improvement of teaching practice becomes, in the words of Richard Elmore, a "gargantuan task."⁹ Elmore (2008) explains how unlikely it is that PD sessions alone will enable teachers to teach more effectively:

The teacher usually returns to a classroom and a school in which the conditions of instruction and the conditions of work are exactly the same as when he or she began the professional development. The students are exactly the same. The content is exactly the same, or only slightly altered by the new materials introduced through the professional development. The teacher begins to teach and discovers that the ideas that seemed plausible during training don't seem to work in the school or classroom context. The "real world" in the language of the teachers, overwhelms the new idea, no matter how powerful or well-demonstrated in theory. (p. 120)

Consequently, the extent to which teachers who attended the Aligned Partners PD sessions were able to implement project-based teaching and performance assessment in their classrooms depended as much on the existing conditions in their school and in their classrooms as it did on the characteristics of the Aligned Partners PD. This suggests that TAOs and districts should focus as much on these conditions as on the PD itself.

The Use of Project-Based Teaching and Performance Assessment

The project-based instruction we observed and the extent to which students appeared actively engaged in those projects varied widely across the six observed classrooms. The variation in quality seemed to correspond to each teacher's pre-existing instructional expertise and classroom management abilities. Beyond the variability among teachers' individual skills were the site-based conditions at each school and the extent to which teachers were supported by administrators and colleagues to learn how to use project-based teaching and performance assessment in their classrooms with

their students. For the most part, teachers were isolated in this work. One of the three focal schools, Hayes Middle School, created structures specifically to support teachers to use project-based teaching and performance assessment. In the other two schools, project-based teaching and performance assessment did not appear to be a significant focus. These schools had not developed structures to support teachers' learning about project-based teaching and performance assessment. This circumstance is not all that surprising, given the relatively small numbers of teachers at these schools who attended the Aligned Partners PD and the low priority of these instructional approaches by the district. One site administrator said, "Project-based teaching is one of a lot [of] different things that are in the mix..." and went on to say that "the math curriculum and the balanced literacy approach" were the big district priorities.

In the following section, we first describe instruction in the three classrooms that represent the strongest observed examples of teachers integrating project-based teaching and performance assessment practices into their teaching. These classrooms also had teachers who exhibited a strong combination of classroom management skills and subject expertise. Next, we describe the sorts of implementation challenges that teachers encountered in navigating the complex interactions among new methods and knowledge, existing patterns of student engagement, and the modifications to curricula and content that seemed necessary to execute these new practices in their classrooms. Finally, we describe the ways the principal at Hayes Middle School attempted to create conditions at her school to support teachers' ongoing learning about project-based teaching and performance assessment and to what effect.

Notable Successes with Project-Based Teaching and Performance Assessment

In the classrooms where teachers demonstrated strong classroom management skills, students were engaged in projects with opportunities for authentic learning that they found personally meaningful. For example, in a classroom at Roosevelt High School in a career-integrated program, students were engaged in designing a virtual business of their own choosing. Students developed businesses to sell baked goods, backpacks, sneakers, and even haircuts. One student who was developing a music streaming business expressed interest in the project: "You have your own control over the project....It's not like, 'Oh you do this,' and you just have to do it, just being forced to. You get to be creative, do whatever you want, and just run with it."

In this class, students worked in small groups and assumed jobs in their virtual companies designed to simulate actual jobs. They developed a business plan for their virtual enterprise and learned basic principles of financial planning, accounting, marketing, developing sales contracts, and managing people. The students were also expected to present their business plans to people in the community who represented potential investors in their businesses. A student who had developed a baked goods company said that, when the potential investors visited class, they "had to dress up for the interview [and] make a resume." She learned about the bakery

businesses by developing an industry analysis: “I learned the [industry] is split. You have the independent mom-and-pop bakeries, but then you also have the chains, like Mrs. Fields and Dots Cupcakes.” She said the mom-and-pop bakeries are doing better than the chains “because people are looking for more of a homemade taste.” She also said, “Annual revenues of the whole industry are growing,” which encouraged her because she wants to have a bakery business one day.

In classrooms like this one, where students seemed productively and meaningfully engaged in project-based activities, we noticed ways that the classroom environment supported students’ learning. For instance, teachers gave students authentic opportunities to make decisions and realize connections, to see that what they were learning was relevant to real-world problems of interest to them. We also noticed that students’ thinking was more likely to be challenged. For example, in one classroom at Hayes Middle School, a student said, “Our teacher is really good about asking us questions that help us think about the project and our answers.” In this class, students participated in an interdisciplinary project that teachers had co-designed. Several students described how this approach furthered their understanding:

The teachers talk a lot about trying to connect all the classes....We’re trying to design the space colony in science and math, and then we’re going to build it....In our history class, we’re learning about creating a government for our space colonies....It’s kind of mirroring the past... how we can strive to create a better government for our colony as well as learning about what’s happening right now in our country.... Not every single day is dedicated to the space colony, but we do have days where we get to collaborate with our group in almost every single class,...getting different viewpoints from different people.

Another student in this same class explained, “Not only am I learning the stuff I’m supposed to learn, but I’m also using the tools that I use in math and putting those tools into a project that I can work on.” These students expressed their preference for having their learning assessed through projects instead of traditional multiple-choice assessments. Another student in this class said, “Sometimes we do a bigger project at the end of the unit so we can show what we know and use what we know....” They explained that project work provided them with a better opportunity to show what they had learned throughout a unit rather than responding to on-demand questions.

Implementation Challenges: Negotiating the Complex Interactions among Content, Students, and Teacher

Creating a classroom culture with routines and norms that support productive student group work and managing numerous, multifaceted projects takes knowledge, skill, and practice. The other three teachers we observed—one in each focal school—

seemed to have fewer such skills and their projects appeared less effective in different ways. Effective projects, according to the Teaching TAO, focus on a central problem or question that is open-ended and meaningful and are driven by student-generated inquiry, aligned to learning goals, and sustained over time. Designing and facilitating effective projects is demanding and requires teachers to learn new knowledge, skills, and practices and to unlearn others.

At Roosevelt High School, one teacher who was new to project-based teaching wanted to involve students in project work in her class because she thought this instructional approach was better for students. She said that, when she first launched the project, “it didn’t go very well.” The teacher described an array of challenges she faced in both the design and implementation of the project. First, she had wanted to develop a project that involved students examining interactions between the local community and police, but she was dissuaded by colleagues who said the topic was too controversial. So, she settled on a more benign topic, but one with less relevance to the students’ daily lives. To kick off this project, she organized a field trip, but only five students showed up after school to attend.

Once the project was underway, the teacher said that her students had “problems finding data for their research [topics].” She quickly realized there were many other skills she needed to teach the students to make this project a success. She explained that students were supposed to collect data from their local community; but when she checked students’ data sources, some had referenced data they found on a website in another state in a city with the same name. Although she explained that she had taught students a lesson on how to search for information, she discovered that “looking for the information is a challenge for them.” Since gathering this information was ancillary to her main student learning goal, which was to graph and visually display data in clear and meaningful ways, she became overwhelmed by the demands of facilitating an effective project.

Her frustration was compounded by managing the students’ behavior, which she said was generally “a huge challenge” with this group. Students also commented on how the classroom environment sometimes made it difficult to learn. One student said:

Some people don’t want to be here, but they have to be here. And, instead of learning, they’d rather talk with friends....On a usual, daily basis, there’d be people in the corner who are on their phones or talking or goofing around, while others are trying to learn what the teacher’s teaching, but we can’t because the teacher has to be arguing with the students, so we miss it.

This classroom environment presented challenges for the teacher and for the students. Even when, at the teacher’s request, a second adult (a coach) arrived in the classroom to help with this project, the students’ behavior did not change in any

discernible manner. This teacher said she thought her students' behavior during project time actually became "a little bit worse because [her] attention [was] more dispersed." She explained, "I don't notice what they are doing right away [or] maybe they're curious [about] what other students are doing." Given these challenging circumstances—and how isolated this teacher was in her efforts to manage the complex demands of project-based teaching in her classroom with her particular students—it was not surprising to learn that she eventually discontinued this project and abandoned project-based teaching for the year. Her experience illustrates Elmore's (2008) explanation that the real world of teaching can overwhelm the idea of the new method and, as a result, little discernible change to instruction occurs.

In other classrooms in other focal schools, we found teachers who struggled in similar ways. At Hayes Middle School, one teacher who was relatively new to teaching chose to design and implement short 3- to 5- day projects. Students in this teacher's class often copied information from the internet instead of synthesizing information themselves. The feedback they received from the teacher lacked substance. They were told, "Good job," or "I liked that you didn't read off the slides." This teacher's projects did not require students to think deeply the way his colleagues' projects did nor were his students asked to provide evidence of their learning. This teacher appeared to believe that preparing students for a learning defense was akin to teaching students presentation skills. Such a belief reveals limited knowledge of performance assessment practices. Although the teacher persisted in designing and implementing projects, they were not sufficiently meaningful or challenging to students. This teacher needed more ongoing support to strengthen the quality of his project-based teaching.

At Lowell Middle School, a teacher who struggled to effectively implement project-based units thought her students' attitudes toward school were the chief problem. She said her students were disengaged and had "low expectations of themselves." She explained that introducing project-based work was challenging because her students were "not independent learners" and they wanted "the right answer." In schools where students have a history of low-performance and low expectations, the task of changing teaching and learning is even more challenging and requires more ongoing supports for both teachers and students. The students reported that projects in this class were unsatisfying, too. Some of these students described a recent assignment where they were given a worksheet with questions that they had to answer from a specific website. However, they said the worksheet was "outdated or something" because the information needed to complete the problems was not available on the given website. When asked about the purpose of the assignment, the students responded, "We're preparing for the district test." When asked to describe the project that they were working on in more detail, one student said that the project "sounds fun, but since the worksheet's outdated, it's kind of hard to find the information and it's a little confusing." Another student said, "I see how [the projects] could benefit us, but they need to be structured a little." A third student agreed and thought

“a little more instruction and a clear idea of what to do” from the teacher would be helpful. These students, however, did describe liking a project in another class “because it helped me understand the subject.” In each of these classrooms where the project-based teaching and performance assessment we observed appeared ineffective, the question loomed: what would it take to improve the instruction and learning experiences for these students in these classrooms?

Organizational Conditions to Support Teachers’ Ongoing Learning about Project-Based Teaching and Performance Assessment

Designing and implementing effective projects with meaningful assessments requires time, practice, and feedback. Teachers in the study reported struggling to find time to plan for their projects beyond the time they were provided during the PD sessions. A teacher at Roosevelt who successfully implemented a project stated, “I would have preferred to have finished the project during the PD...because what happens is, let’s say I get it two thirds done,...when will I do that other third?” This teacher needed time to develop projects, time to reflect on the projects in progress, and time to strengthen project-based teaching with feedback from others. When the Hayes Middle School principal wanted to encourage teachers at her school to develop meaningful projects for students, she set aside time for teachers to work on their projects. She wanted more teachers to engage in project-based teaching and develop project-based teaching practices. In addition to providing grade-level teams with planning time, she asked teachers to give her a project-based unit plan each quarter. When the principal received a plan, she provided feedback to the teacher. She gave teachers time and encouraged them to consider how effective their projects and performance assessments were, a practice the Aligned Partners emphasized as important for learning how to do project-based teaching. A Hayes teacher described their value:

The principal gave grade levels time....So we actually started [the Space Colony project] last year and we fine-tuned it this year...We’ve kind of expanded it...[after considering] what’s good, and what’s bad, and what do we need to change, what do we need to delete.

This teacher’s grade-level colleague described the complexity of their project: “Everything ties into the rocket and the space colony.” Across all eighth-grade classrooms at Hayes Middle School, students worked on various aspects of the larger project in ways that were connected to subject area content. Students engaged in writing laws and commandments for their colonies in the history classroom and worked on ways to advertise the unique attributes of their colonies in English class. In math class, students used their knowledge of linear functions to simulate launching a rocket into space and used their understanding of how to shift linear functions vertically and horizontally to avoid hitting asteroids. A teacher emphasized that, in order to plan an interdisciplinary unit like the space colony, teachers need lots of planning time to collaborate with grade-level colleagues:

I think we need more collaborative planning time. Fortunately, my eighth-grade team has been good with communicating outside of school hours, [over] email, and working together, seeing where different lessons can fit in and relate to the other core classes.

The eighth-grade team invested significant time, both in and out of school, planning their project. This, however, was not the norm.

In the first quarter at Hayes, after the principal provided grade-level teams time to work on their project-based units, nine core teachers submitted projects. The supports and this expectation seemed to increase the number of teachers at Hayes who incorporated project-based teaching and performance assessments into their instruction. Thirteen teachers submitted project-based units the following quarter. Then, mid-year, when district-prioritized initiatives usurped the time that the Hayes principal was able to set aside for grade-level project planning, only three teachers submitted project-based units. Ultimately, the principal's efforts to support teachers were undermined by district initiatives that competed for teachers' scarce time and attention. This situation, common in districts, illustrates that it is important for districts to identify a few clearly defined instructional priorities and then allocate the requisite resources, including time, to schools so they can make progress toward achieving them. When district personnel do not prioritize instructional initiatives or provide support for implementation, principals and teachers will often resort to superficial implementation.¹⁰

Making Sense of What Impedes and Assists Coherence

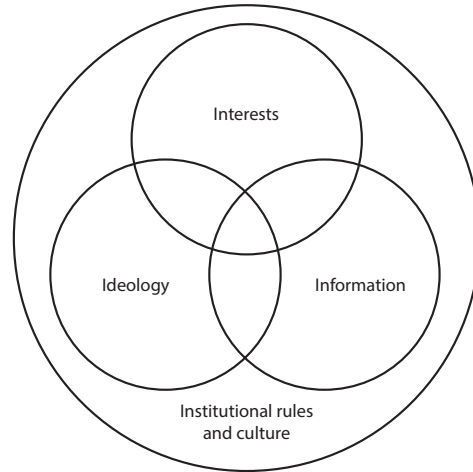
Examining the Aligned Partners' Efforts to Collaborate on Creating Coherence

The Aligned Partners sought to support ongoing reform within HGUSD by attempting to cohere their products and services. In this section, we employ Carol Weiss's (1995) Four "I's" decision-making framework—which specifies the importance of *interests, ideologies, information, and institutions*—as a conceptual lens to analyze our data.¹¹ We examined the efforts of the three TAOs as they worked to collaborate with each other, to coordinate their products and services, and to align both to the particular goals of HGUSD. Specifically, we analyzed how, as Weiss puts it, “different people bring different interests, different ideologies, and different information to the decision-making task” (p. 573). This conceptual lens was useful for our purposes because the Aligned Partners engaged in an iterative process of negotiated decision-making that took place over 11 months as they revisited the purpose of their technical assistance offering(s), the content of the technical assistance, the targeted recipients, and how best to organize and deliver it. The Four “I's” framework focuses analytic attention on the particular *interests, ideologies, and information* that each of the three TAOs brought to their collaborative task of becoming “aligned partners” and how, at the organizational level, each *institution* influenced decision making.^f

Given that the institutional arena in which decisions are made influences decision-making, Weiss depicts the relationship among the first three “I's” as situated *within* the broader institutional landscape to show how these elements are interconnected and mutually influencing. (See Figure 1 on the following page.) In the Aligned Partner's Project this interplay was constant and iterative. The TAOs worked out the specification of their ideologies and interests with respect to aligning their service offerings in conjunction with processing information they received in the context of this project. The analysis that follows shows how, in different circumstances or within different institutional landscapes, these TAOs might make different decisions about collaboration, alignment of their services, or even deciding in which district they would like to work.

f. See Appendix C: *Four “I's” Framework* for definitions of each of the Four “I's.”

Figure 1. Interaction of Ideology, Interests, Information, and Institution



Source: Weiss, C. (1995).

A Comparison of Organizational Interests and Ideologies in the Project

How the Aligned Partners understood what they needed to do individually and collectively was influenced by their own interests and ideologies, as well as the information they accessed. In their proposal, the purpose of the Aligned Partners Project was clear—the overriding aim of the project was to “align” each individual organization’s work in such a way that together they created a compelling and coherent service offering for districts that are interested in strengthening their approach to career-integrated learning. Each organization understood this purpose. However, they discovered that what it meant for them to achieve this purpose was intertwined with the emergent individual desires of the people working on this project, the organizational interests of each TAO, and the interests of the particular district in which this project was situated. Interests also evolved as information emerged. For instance, the existence of HGUSD’s graduation policy was new information to the staff of the Teaching and Assessment TAOs working on this project. This information altered each TAO’s interest in the project. This interplay, in turn, shaped the ultimate goals, content, and organization of the Aligned Partners’ technical assistance and to whom it was provided in HGUSD.

The Teaching TAO stated its organization’s initial intention for the Aligned Partners Project this way: “To revise our three-day, project-based teaching professional development offering,” to attend to the specific needs of teachers in career-integrated program, and to consider “ways we could use [this new service offering] with other districts.” This was a clear expression of its organization’s interest. The Assessment TAO said its organization’s interest in the project was to see “if we succeed in finding a way in which our services kind of need each other” as a mechanism for the

acceleration and growth of these practices (e.g., project-based learning, performance assessment, and career-themed courses) in districts. This interest expressed a desire to understand how valuable *and* marketable the integration of their respective services might be. Finally, the Leadership TAO said its interest in the project was to explore the possibility that the sum of their tri-organization collaboration would be more beneficial for a district than their individual, discrete technical assistance offerings. That is, this TAO was also interested in identifying more attractive offerings to future clients. These expressions of organizational self-interest remind us that TAOs have basic needs for getting paid for their services and finding a marketplace for them—along with their sincere interest in doing good in the world and improving learning for students. The different and sometimes competing interests and needs of the Aligned Partners was an ongoing tension in the project, further complicated by the particular interests and needs of HGUSD, which emerged and evolved during the project.

The district's interest in the project emerged during a phone conversation with the HGUSD Assistant Superintendent at the TAO's first planning meeting in August 2016, which the Leadership TAO initiated. The Leadership TAO had the most information about HGUSD, and it was the explicit project role of this TAO to broker connections between HGUSD and the Aligned Partners. This role was also consistent with the Leadership TAO's values and can be viewed as an effort to further the particular interests of this TAO as well as meet the overall goal of the project. The Leadership TAO's suggestion to talk with the district was welcomed by all three TAOs and further demonstrates the dynamic interplay that occurs among interests, ideology, information, and the institutional context in which decisions are made.

District Information Influenced Partners' Interests and Project Goals

During the call with HGUSD, a district administrator shared HGUSD's graduation policy. The district's expressed interest was to develop teachers' instructional capacity to prepare all students to be able to provide evidence of their learning in portfolios and public defenses by 2019. This administrator explained that some, but not all, high school teachers in the district taught in career-integrated programs and that these teachers were farther along in their development of project-based teaching and performance assessments than other teachers. Therefore, the Assistant Superintendent thought the teachers who were not teaching in career-integrated programs would benefit most from the Aligned Partners PD.

The information provided by this administrator revealed HGUSD's interest in the project, at least through the lens of this district administrator, who was the project's primary district contact. The information, which would have been useful much earlier in project planning, influenced the TAOs' thinking about the project's goals. For instance, the Assessment TAO saw an immediate connection between the district's goal and the expertise of its organization. The Assessment TAO realized there

might be new possibilities for technical assistance in this district and more opportunities for future work in other districts. The Teaching TAO wondered about the schools and teachers in HGUSD that weren't currently teaching in career-integrated programs and wanted to know if these teachers would attend the Aligned Partners summer PD. The unstated assumption that all PD participants would be high school teachers who taught in career-integrated programs was called into question. The philosophy of the Teaching TAO was to develop high-quality professional development modules that it could use in various contexts; its financial model and technical assistance philosophy was not to customize its PD modules to the particular strengths, interests, and needs of each local context in which they were hired. Well after the development of the proposed work plan, the question of who the PD was intended for suddenly became greatly important to both the Teaching and Assessment TAOs.

As the TAOs began to work out the specification of their own interests and their organization's stance toward designing and providing technical assistance in relation to HGUSD's interests, as well as the realities of the context that they were discovering, they began to reimagine, to varying degrees, their own interests in the project and to reconsider their collective stance toward working with this particular district and with each other. These interests intermingled and shaped the contours of the Aligned Partners' work in various ways. Ultimately, the HGUSD's information, as well as the information they gathered from one another, led them to reshape their project goals, which they continued to refine during the months of planning that led up to their first PD offering in July 2017. The goals for the project became re-framed in terms of fulfilling district needs as represented by the Assistant Superintendent rather than simply fulfilling their own organizations' interests. This was a significant and important adjustment that occurred in the first months of the project, leading to more district-oriented project goals:

1. *Contribute to HGUSD's capacity to have all graduates participate in a portfolio defense by 2019*
2. *Contribute to HGUSD's desire for integrated learning experiences for all high school students (that might feature research, communication, and innovation skills)*

The TAOs also imagined a third goal for their project:

3. *Contribute to a different sort of instruction (as yet not explicitly defined) in order to successfully prepare students for college and career*

This third goal was distinctly aspirational. Members of the Aligned Partners Project recognized the need for an ambitious approach to instruction in schools in order to achieve the long-term goal of preparing all students well for college and career, which was the implied goal of HGUSD's graduation requirement.

The re-framing of the project goals adhered to the proposal’s stated aim to make their services “contextualized for HGUSD’s specific needs.” The goals, which as stated were in the interests of all four organizations, also provide an example of how the TAOs eventually involved HGUSD in the project. At specific points in time, the TAOs consulted with the district to either gather or deliver information. This information enabled the TAOs to “contribute” to the district’s goals. HGUSD’s role remained limited—even if consequential—in the Aligned Partners’ project. HGUSD’s involvement points to the need for TAOs to communicate with the district early and often and to consider the purpose of talking with district partners to include and go *beyond* sharing information; the purpose must include shared decision-making.

TAOs Continue to Assert Their Organizational Interests

By the December 2016 meeting, the TAOs were again reconsidering the aims of the project in terms of their own interests. The Teaching and Assessment TAOs viewed this project as an “opportunity for R&D...to develop materials for the broader field,” meeting their own organizational interests. The Leadership TAO also looked out for its organization’s interest and saw an opportunity to explore “systemic coherence building and continuous improvement with district leaders,” a possible new frontier for its services. The primacy of their own interests at times overshadowed their capacity to foreground the district’s interests, which were pushed, at least temporarily, into the background of their conversation. For example, two TAOs expressed their growing concern that HGUSD might not be the “right” location for it to test out the products that they had imagined developing as part of the Aligned Partner’s project.

The Leadership TAO, which had the strongest relationships in HGUSD, continued to assert its desire to clarify and redefine what it considered to be its overly simplistic role of relationship broker and communication liaison to HGUSD. The person representing the Leadership TAO wanted a role more suited to its core expertise of supporting district leaders and made the case for a deeper understanding of the particularities of the HGUSD context. This person’s participation in the Aligned Partner meetings helped inspire the idea to develop a diagnostic tool to illuminate important aspects of the district context conditions. Once the project was underway, all TAOs recognized that such a diagnostic tool promised to help fit the tools and services designed by the Teaching and Assessment TAOs to the specific needs of HGUSD. Developing this diagnostic tool, however, went beyond the project resources and the project did not complete the tool.

Even while the TAO’s own interests were at the forefront of their minds, they also wanted to develop a service offering that would be useful to the district. The Aligned Partners were cognizant that the Foundation had its own interests in this project, to support developing greater coherence in HGUSD. Increasingly, everyone felt a need to satisfy the various (and sometimes competing) organizational interests that this

project surfaced. One TAO noted the tension: the district and the Leadership TAO “are understandably more interested in how [the Aligned Partners] will meet the district’s particular needs—that’s been a healthy tension all along.” Such tensions may be intrinsic to the enterprise of integrating technical assistance services for the purpose of helping a district achieve its goals.

Conceptualizing Different Technical Assistance Ideologies and Their Influences

Each TAO had its own approach to its technical assistance work. Fundamental differences—such as whether or not it is possible to offer a solution to districts before fully understanding the nature of the particular strengths, interests, and needs of a district—were real and significant. These differences influenced the way each TAO conceptualized, and therefore approached, its design and implementation work within HGUSD.

Approaches to Technical Assistance

One mental map for technical assistance sees the goals of the user (the client) as driving the service approach and believes that, in at least some circumstances, the user must be involved in a meaningful way in the design of the service or tool and its use. We call this mental map the *co-design* approach. Another mental map argues for creating tools and service offerings in accordance with a particular set of pre-determined design specifications and then testing the utility of that offering in particular settings. This mental map is a *delivery* approach. These two maps are different ways of conceptualizing what the nature of technical assistance work entails and, therefore, what alignment means. A third approach, which sits in between these two ends of a spectrum, might be thought of as a *consultancy* approach, in which the user is consulted at various intervals during a technical assistance engagement and thereby has some agency in its design and implementation, although less than in a co-design approach. Each TAO in the Aligned Partners was more oriented to one of these approaches, and the TAO’s different mental maps for how to approach technical assistance were a source of ongoing tension in their collaboration.

Limitations of the Delivery Approach to Technical Assistance

In the delivery approach to technical assistance, the district is viewed as a *receiver* of technical assistance. This approach casts the district in a passive role. Consequently, and particularly if a district accepts this role (as at times HGUSD appeared to do), the district is unlikely to proactively provide information to the TAOs that might influence the implementation of the technical assistance to better serve its needs. Conversely, the TAOs are inclined to think primarily about the district’s role in

logistical terms: as the securer of dates, times, and spaces for technical assistance as well as the recruiter of participants to attend the training(s). This view of the district does not consider the relevant information a district holds about participants' background knowledge; their strengths, interests, and needs; or the workplace cultures in schools—all of which might affect the design, content, and ultimate success of the technical assistance. The delivery stance toward technical assistance may also be less likely to engage district leaders in thinking about the kinds of supports that they will need to provide in order to help participants—in this case teachers—use the technical assistance knowledge and tools. The implementation of technical assistance, regardless of the stance of the providers, becomes more successful when district actors organize structured opportunities for the receivers of technical assistance to use what they have learned and when such opportunities also support learning how to refine the use of technical assistance resources so that a district's particular goals are met.¹²

The Aligned Partners' Project Approach to Technical Assistance

A delivery approach to technical assistance was initially the default mode of the Aligned Partners Project. Nevertheless, and importantly, the early conversation the TAOs had with the Assistant Superintendent influenced them to use the district's graduate profile when they developed their four-day summer workshop for teachers on project-based learning and performance assessment practices. This is an instance when the Aligned Partners' collective approach to technical assistance moved in the direction of a more consultative approach.

Given the varying technical assistance ideologies of the TAOs, the district's limited involvement in the planning of the Aligned Partner's Project led to some difficulties. The biggest problems were that the district lost track of the Aligned Partners Project during its planning phase, and the TAOs neglected to pay sufficient attention to the dynamic context within the district. For example, one district administrator involved in the early stages of the project said, "I honestly didn't feel the impact of any of the work, because it was just conversations that didn't involve us. I didn't see any direct support or planning." In addition, the TAOs were slow to discover that, in the words of the Assistant Superintendent, the district was particularly interested in having the Aligned Partners help them figure out how to "go beyond our [career-integrated programs] and how [to]...really utilize this approach to learning and teaching to have a bigger impact on everybody" rather than continuing to refine the teaching practices within the career-integrated programs.

In retrospect, some of these problems might have been avoided if the district's role was viewed differently from the beginning of the project by the Aligned Partners, and also by the district. For instance, if regular communication mechanisms were established for updates on progress toward the project goals and sharing information about the district's evolving needs and interests, then the TAOs and the district

might have been able to jointly identify who from the district ought to participate in the PD and when the PD should be scheduled to best accommodate participation by those people. In the absence of regular communication, the timing of the Aligned Partners technical assistance was a problem for HGUSD because they did not have enough advance notice to recruit the desired participants. Other summertime PD opportunities had already been scheduled in the district. The problem of conflicting district PDs also indicates the problem of many uncoordinated initiatives going on at once within HGUSD. Many of the teachers whom the Assistant Superintendent originally identified to attend the Aligned Partners PD, were either already planning to attend a different district PD connected to other district goals or were signed up to teach in the district's summer school program. These commitments interfered with attending the Aligned Partners PD. Thus, getting the desired teams of teachers to attend the four consecutive days of PD was a real challenge.

When these challenges emerged, there was little that either HGUSD or the Aligned Partners could do to accommodate their conflicting interests. This lack of information can be seen as an instance when both the Aligned Partners and the district were blind to the idea that partner organizations have their own interests, needs, and timelines to accommodate. While this scheduling dilemma was resolved, it importantly signaled the different interests and ideologies of the partners, the problematic nature of the district's given and assumed role as a "receiver" of services, and, thus, the idiosyncratic manner in which information emerged during the project.

While setting technical assistance dates far in advance is an important project planning principle, getting educators to attend PD is not an unusual problem, even with advance planning. Had the district been in closer communication with the Aligned Partners during the planning phase of their work—as the *consultancy* or *co-design* approach would have made more likely—this scheduling problem might have been mitigated, if not avoided. The Aligned Partners would have learned far enough in advance that four consecutive days of technical assistance in July posed challenges for the district and so might have found different dates for the technical assistance or, perhaps, split the training into a different configuration. Additionally, with more advance insight into the content of the Aligned Partners PD, the district might have been able to interest more participants (including school principals and coaches) in attending the PD, found ways to connect this PD opportunity with other planned technical assistance in the district, and identified ways to help other district leaders understand the Aligned Partners PD's importance for achieving the district's goals for its students. The absence of this information had important and unintended consequences for who ultimately attended the PD as well as how involvement in the project was supported and sustained during the following school year.

The District's Stance toward Technical Assistance

Districts typically either view technical assistance as filling perceived knowledge and skill gaps within a district or as helping a district develop its capacity (perhaps by targeting particular groups of educators) to develop the knowledge and skills it needs to learn and improve. A district's ideology, or stance toward technical assistance, influences how it organizes district resources and conceives of working with TAOs. When districts see TAOs as providers of workshops to teachers, they may be less likely to consider ways that these TAOs could help the entire district system (site leaders and central office personnel) grow their capacity to support teachers (and others) to use and refine the technical assistance they have provided. And, when administrators see TAOs as the holder and provider of expertise, there is a tendency not to notice the knowledge and skills that teachers in the district possess and that they can be supported to develop through ongoing and intentional practice. Though a goal the HGUSD Assistant Superintendent articulated was to spread the Aligned Partners' approach to teaching, learning, and assessment across the district, it is unclear how this leader (or the central office) thought that the Aligned Partners' approach would spread within the district or be supported by school site leaders and other district administrators—especially those who had little, if any, knowledge of the Aligned Partners PD. By not planning for ways to provide sustained support to teachers and principals who attended the Aligned Partners PD, the district acted as if providing the PD would be sufficient for engaging teachers in a different way of planning for instruction, teaching, and assessing students and for helping principals know how to create the school-based conditions that could support teachers in these efforts.

In addition, because HGUSD seemed to adopt a receiver of technical assistance services stance to the Aligned Partners Project, it did not try to collaborate in the project decision making or attempt to provide additional information to the Aligned Partners, such as the PD participants' familiarity with project-based teaching or performance assessments—nor did the TAOs ask for it. Information about the teachers' baseline knowledge of project-based teaching and performance assessment might have helped the Aligned Partners design more effective follow-up technical assistance structures and might also have given both the Aligned Partners and district leaders a better understanding of the teachers' goals for participating in the Aligned Partners summer PD. In addition, seeking out information about the existing conditions for adult learning in the schools and district could have helped both the Aligned Partners and district leaders plan for ongoing learning and sustained use of the Aligned Partners' technical assistance. Finding ways to engage in this sort of rich information sharing between the district and the TAOs, regardless of each organization's stance to technical assistance, is critical, but not sufficient, for achieving greater coherence among TAOs and districts and for creating the conditions in which technical assistance can help raise the capacity for instructional improvement in districts.

Connecting Project-Based Teaching and Performance Assessment to Defenses of Learning

Teachers and school-level administrators felt that getting all students ready to participate in defenses of learning would be a challenge, and district administrators seemed to anticipate that the Aligned Partners' PD would provide support to teachers to integrate project-based teaching and performance assessments into their classrooms. However, in speaking with principals and instructional coaches, there seemed to be little clarity within the district about what would be required in order to have all graduating students participate in a defense. One principal stated:

The general idea of what's required, what students have to do, is here. But which teachers are responsible for holding defenses, judging them, assessing them, which community members are going to be involved,...the structure of getting all graduates to do their defense? I think [that] will be quite the challenge.

There was a visible need within the district to develop the logistical and technical capacity to engage all 1,500 high school seniors in developing a portfolio and publicly defending their learning to a panel of judges. These logistical challenges may have overwhelmed the district's capacity to ensure that all students had sufficient opportunities in their classes to participate in project-based learning and performance assessments that were of high quality.

The district expectation that all students would have project work to defend and that all students, including special education students, would present and defend their work was ambitious and commendable. Indeed, during the 2018–2019 school year, all high school seniors participated in defenses—a considerable accomplishment, given the scale of this undertaking. However, the depth of the defenses that students were expected to participate in and the ways in which students were asked to defend their learning sometimes appeared superficial in the twelve defenses we observed at Roosevelt High School.^g From our limited observation of the defenses in one school, we noticed most students presented the same projects from the same classes. Few students offered or were asked to provide critical reflections on their learning. We observed defenses in front of four different panels. We noticed that panelists' questions to the students and their understanding of the panel's purpose seemed to vary from panel to panel. Some panels asked students analytical and conceptual questions about the content of their work; others primarily asked students questions about their learning process. From our limited observations of the defenses, it occurred to us that future

g. See Appendix B, Table B4: *Number of Graduate Portfolio Defenses in HGUSD.*

panelists might benefit from a clearer understanding of the purpose of the defenses and additional tools to guide their administration of the defenses, such as a common protocol of questions to ask students and more specific criteria for evaluating a student's defense of his or her learning.

In order for HGUSD's new graduation requirement to hold all students to a high standard of learning, the district would need to focus on the instruction in classrooms and students would need many more opportunities prior to entering high school to engage in critical, reflective thinking and demonstrate evidence of their learning. Teachers would need more regular practice using project-based teaching and performance assessment with feedback on their efforts in order to develop their capacity to engage students in the types of rich and ambitious learning experiences that are particularly well-suited to defenses of learning. It is not surprising that more time, practice, and feedback are needed to develop the conditions in which such ambitious teaching and learning practices can grow.

Conclusion

The Aligned Partners' constellation of goals was ambitious and underestimated the influence that each organization's unique interests and stance toward providing technical assistance would have on accomplishing these goals. The value HGUSD saw in this project, spreading project-based teaching and performance assessment beyond the career-integrated programs, was not isomorphic to the differing chief goals of each TAO within the project. Each organization had different interests and ideologies. Even with the relatively complementary services that each TAO provided, as well as the overall goodwill between the Aligned Partners and HGUSD, it is clear that formidable challenges arise when aligning technical assistance services and helping districts to develop internal coherence. As the analysis and discussion of the Aligned Partners Project has illuminated, it is difficult and non-linear as well as time and labor intensive to: (1) align technical assistance services to the developmental realities of districts, schools, and their personnel; (2) organize services in a coherent and measurable way; (3) contextualize services for the specific and multiple strengths, interests, and needs of communities within a district; or (4) design services in ways that raise the capacity of all participants, despite their different roles, preparation, and beliefs.

Despite the inherent difficulties in achieving these goals, if technical assistance is going to occur in ways that support, rather than undermine, district coherence and in ways that increase a district's capacity to make effective use of the assistance, then aligning services across TAOs and connecting those services to a district's particular goals seem like useful endeavors. The Aligned Partners did not fully achieve all their goals, such as raising the capacity of all participants in their PD or aligning to the developmental realities of the school sites and personnel. Their efforts, however, were significant and helpful to HGUSD.

As the analysis suggests, the Aligned Partners may have been more successful if the district had been engaged as an active, authentic partner in achieving such goals. Districts, for instance, must contribute to goals of capacity development by creating the conditions in which teachers, school sites, and the district are actively supported to use the products and services that TAOs provide. After all, the capacity to use project-based teaching methods and performance assessments will get developed over time through teaching and assessing in these ways. The study of the Aligned Partners shows that, when trying to align and contextualize technical assistance services and build local capacity within a district, identifying and paying attention to the interests, ideologies, and relevant information of each organization, *including* the district, can aid decision-making and assist this process.

This study also illuminates some of the complexity, difficulties, and time-consuming nature of aligning the services of TAOs and contextualizing those services to a

district's goals in more than a surface way. Given all of the challenges that the Aligned Partners confronted—and remembering that these were three relatively compatible organizations with complementary service offerings and a great deal of goodwill among the TAOs and the district personnel—the formidable challenges of such an undertaking emerge. In addition to being complicated and time-consuming, this work is not necessarily in the direct interests of the TAOs. Therefore, aligning technical assistance services is not likely to occur without incentives, external supports, and the insistence of the funder—whether the funder is a philanthropic organization or the district itself.

Finally, the study of the Aligned Partners Project shows that the district has an important (and often unrecognized) leadership role to play in the manner in which it engages with TAOs. Districts need to know and assert their own organizational interests in and goals for technical assistance. Districts ought to give intentional forethought to how the district will support and sustain the learning that will inevitably be needed to implement, deepen, and spread whatever technical assistance knowledge, skills, or tools are brought into the district.¹³ Therefore, a district might be well served to determine a TAO's approach to technical assistance (i.e., co-design, delivery, or consultancy) as part of its decision-making process about whether or not, and how, to work with a particular TAO. Districts also might want to consider in advance what successful implementation of the technical assistance will look like over time, then plan forward and backward, perhaps with the help of technical assistance providers, to develop an approach for how the district can realistically achieve those results.

Endnotes

1. Elmore, R. (2008). *School reform from the inside out: Policy, practice, and performance*. Harvard Education Press, p. 124.
2. Cohen, D., Peurach, D., Glazer, J., Gates, K., & Goldin, S. (2014). *Improvement by design: The promise of better schools*. University of Chicago Press, p. 14.
3. McLaughlin, M. & Mitra, D. (2001). Theory-based change and change-based theory: Going deeper, going broader. *Journal of Educational Change*, 2(4), p. 315.
4. A companion paper examines the roles of the Foundation and SCOPE. See Jaquith, A., & Chavez, R. (in press). Ways foundations might help develop coherent assistance in education. *Foundation Review*.
5. These bullets are direct quotes from the Aligned Partners' proposal to the Foundation, p. 4.
6. Charmaz, K. (2014). *Construction grounded theory* (2nd ed.). SAGE; and Glaser, B. & Strauss, A. (2006). *The discovery of grounded theory: Strategies for qualitative research*. Aldine Transaction.
7. Weiss, C. (1995). The four "I's" of school reform: How interests, ideology, information, and institution affect teachers and principals. *Harvard Educational Review*, 65(4), 571–593.
8. Cohen, D., Peurach, D., Glazer, J., Gates, K., & Goldin, S. (2014). *Improvement by design: The promise of better schools*. University of Chicago Press; Elmore, R. (2008) *School reform from the inside out: Policy, practice, and performance*. Harvard Education Press; and Cohen, D., Raudenbush, S., & Ball, D. (2002). Resources, instruction, and research. In F. Mosteller & R. Boruch (Eds.), *Evidence matters: Randomized trials in education research* (pp. 80–119). Brookings Institution Press.
9. Elmore, R. (2008). *School reform from the inside out: Policy, practice, and performance*. Harvard Education Press, p. 120.
10. Honig, M. & Rainey, L. (2015). *How school districts can support deeper learning: The need for performance alignment*. Jobs for the Future. <https://files.eric.ed.gov/fulltext/ED560756.pdf>
11. Weiss, C. (1995). The four "I's" of school reform: How interests, ideology, information, and institution affect teachers and principals. *Harvard Educational Review*, 65(4), 571–593.
12. Jaquith, A. (2017). *How to create the conditions for learning: Continuous improvement in classrooms, schools, and districts*. Harvard Education Press.
13. For assistance in developing fertile relationships between districts and TAOs see the Questions to Ask tool in Jaquith, A. & Snyder, J. (2019) *Toward the desired state: Developing more helpful relationships between districts and technical assistance providers*. (https://edpolicy.stanford.edu/library/publications/Toward_Desired_State_Practitioner_Toolkit)

Appendix A: Project Organizations

Assessment TAO

This TAO had expertise in performance assessment. It was interested in growing its technical assistance services because the organization was expanding. Its clients were predominantly local but this was beginning to change as national interest in the development of performance assessment systems grew. During the project, this TAO doubled its staff and increased its clientele to include national and international clients.

Leadership TAO

This TAO had expertise in providing district leadership support for the development of career and technical education. Its clients were national. This TAO was reconsidering and reevaluating its organizational strategy and approach to technical assistance in response to changes in the external environment.

Teaching TAO

This TAO had expertise in project-based teaching. With around 150 staff, it was approximately 10 times larger than the other two TAOs. Its clients were national. Over the years, it developed an array of project-based teaching products and services, such as multi-day professional development sessions. This TAO had recently hired a new chief executive who, coincidentally, was the former chief executive of the Assessment TAO. Ultimately, the Teaching TAO became the grantee and fiscal agent of this project, responsible for providing subgrants to the other project partners.

The District

The Hams Gulch Unified School District (HGUSD) was selected as the site for this project. It was mid-sized and served approximately 20,000 students. It had developed courses of study within all six of its high schools that combined core academic coursework with career and technical education (CTE) focused on areas such as business, law, and the arts. Almost half of its high school students were enrolled in career-integrated courses of study. In addition, the school board had recently passed a graduation policy that, beginning in 2019, all high school seniors would develop and then publicly defend a portfolio of their course work in front of a panel of adults as a requirement for graduation. This graduation policy indicated a likely need for the products and services that the Aligned Partners Project wanted to develop and provide. Furthermore, each of the three TAOs had provided technical assistance to this district in the past and the Leadership TAO was currently working with HGUSD leaders with financial support from the Foundation.

The Foundation

There was a new president at the helm of the Foundation who was new to philanthropy, believed in supporting the work of TAOs, and understood that systems change work within a district was enormously complex. Empathetic to district needs, the president was familiar with the sort of reform HGUSD was pursuing and saw potential in the idea of the three TAOs working together to help the district develop the capacity it needed to transform teaching and learning for the benefit of students. When the president invited a concept paper from the Teaching TAO describing the idea for a three-way collaboration among the TAOs, the Foundation already had existing grants with the Leadership and Assessment TAOs. Potentially funding the efforts of the TAOs to align their products and services seemed to be a way for the Foundation to accomplish several related goals: increase the impact of its philanthropic dollars, provide better support to a district interested in developing its capacity for systemic change, and develop an approach to systems change that other districts could emulate.

Appendix B: Data and Methods

Table B1: Data Collected and Emergent Analyses during Each Phase of the Study

Project Planning (Year 1 of Study)	
Data Collected*	<ul style="list-style-type: none"> ● Detailed field notes and documents from (1) 60 hours of face-to-face Aligned Partners meetings and (2) hour-long monthly phone calls that occurred between August 2016 and April 2018 ● Analytic memos of three in-person Aligned Partners meetings ● Interviews: twice with representatives from each TAO; once with seven district administrators
Emergent Analyses	<ul style="list-style-type: none"> ● Two memos (one to Aligned Partners and another to the Foundation) that highlighted patterns, synthesized themes (such as the varied organization interests of the TAOs and the district), provided a more elaborated analysis of the data collected thus far, and raised questions for the Aligned Partners and the Foundation to consider as project progressed
Project Implementation (Year 2 of Study)	
Data Collected*	<ul style="list-style-type: none"> ● Detailed field notes and documents from six days of professional development (PD) sessions led by the Aligned Partners ● Interviews with teachers, school administrators, and instructional support staff at schools that attended the Aligned Partners PD sessions ● Classroom observations in six classrooms ● Focus groups (FG) with students in participating teachers' classrooms
Emergent Analyses	<ul style="list-style-type: none"> ● Administrator memo to the district that offered observations and questions about how teachers, administrators, and coaches participated in the Aligned Partners PD program and how they attempted to use the ideas, practices, and materials in their own workplace context
Project Analysis (Year 3 of Study)	
Data Collected*	<ul style="list-style-type: none"> ● Follow-up interviews with teachers and administrators at one school ● Observations of a dozen graduation defenses ● Interviews with executive leaders from each TAO and three Foundation personnel

* See Table B2: HGUSD Study Participants for actual counts of data collected.

Table B2: HGUSD Study Participants

Role	# of interviews	# of classroom observations
Roosevelt High School		
Principal	1	N/A
9 th grade Math teacher	2	2
11 th grade CTE Teacher	1	2
4 students from Math class	1	N/A
3 students from CTE class	2	N/A
Hayes Middle School		
Principal	4	N/A
Assistant Principal	1	N/A
Instructional Coach	1	N/A
8 th grade Science Teacher	3	4
8 th grade Math Teacher	2	4
7 th grade Math/Science Teacher	3	4
4 overlapping students from 8 th grade classes	2	N/A
4 students from 7 th grade class	2	N/A
Lowell Middle School		
Principal	2	N/A
Behavioral Response to Intervention Coordinator	1	N/A
Instructional Coach	1	N/A
8 th grade Math/Science Teacher	1	1
4 students from Math/Science class	1	N/A

Table B3: Interviews with TAOs and the Foundation

Organization	# of interviews	Participants
<i>Assessment TAO</i> Leadership and Staff Members	4	2
<i>Leadership TAO</i> Leadership and Staff Members	4	2
<i>Teaching TAO</i> Leadership and Staff Members	4	4
<i>The Foundation</i> Leadership and Program Officers	3	3

Table B4: Number of Graduate Portfolio Defenses in HGUSD

Defenses in District	Defenses at Roosevelt High School
~1500	~236*

* A dozen of these defenses, which occurred in front of four different panels, were observed.

Appendix C: Grant Activity and Project Timeline

PROJECT PHASES	GRANT ACTIVITIES
Project Design Summer 2015 – February 2016	<ul style="list-style-type: none"> • Concept for proposal emerges & is formalized • Discussion among partners, between TAOs and district, & between Foundation, TAOs, & district
Project Planning August 2016 – May 2017	<p>Two one-year grants for this project (with opportunity to renew) awarded to TAOs (Spring 2016) and to SCOPE (Summer 2016)</p> <p>TAOs:</p> <ul style="list-style-type: none"> • Work to develop “aligned” products and services • Hold three all-day planning meetings <p>SCOPE:</p> <ul style="list-style-type: none"> • Begins documentation of the project work • Shares fieldnotes from each planning meeting with TAOs • Prepares <i>Internal Technical Assistance Memo</i>, shares with each TAO, and discusses contents
Project Implementation Summer 2017 – Winter 2018	<p>Both grants are renewed for the following year</p> <p>TAOs:</p> <ul style="list-style-type: none"> • Give 4-day technical assistance workshop in district, Summer 2017 • Give 1-day follow-up session in district, October 2017 • Give 1-day follow-up session in district, February 2018 <p>SCOPE:</p> <ul style="list-style-type: none"> • Prepares <i>Internal Funder Memo</i> and shares with the Foundation, August 2017 • Prepares <i>Internal Administrative Memo</i> and shares with district, June 2018 • With district permission, shares <i>Internal Administrative Memo</i> with TAOs and Foundation, October 2018

Appendix D: Four “I’s” Framework

Construct	Definition*	Within this Study
<i>Interests</i>	Individual self-interests	Individual organizations’ interests
<i>Ideologies</i>	Philosophies, principles, values, and political orientations	Stance toward technical assistance (e.g., provider, consultant, or co-designer)
<i>Information</i>	Range of knowledge and ideas that inform sense-making	Knowing what will support or constrain: (1) coherence among the different organizations and (2) teaching practices and student learning
<i>Institutions</i>	Structure, culture, operating procedures, and decision rules of organizations within which decisions are made	Who the ultimate decision-makers/ representatives were for each organization; How the context of the district shaped the services provided; Involvement of the Foundation

* Summarized from Carol Weiss’s (1995) Four “I’s” framework

Stanford Center for Opportunity Policy in Education

<https://edpolicy.stanford.edu>

@scope_stanford

scope
Stanford Center for
Opportunity Policy in Education