

Reflections from a professional learning community for researchers working in research alliances



What's Happening

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Conducting collaborative research is challenging—especially for researchers who have never partnered with practitioners to conduct research. Researchers who have not conducted collaborative research may benefit from forming a professional learning community to connect with other researchers who are engaged in a research-practice partnership. This reflective piece summarizes one professional learning community's lessons learned and describes how its members worked to align available resources to the specific needs of the researchers and developed tools to help one another overcome various challenges.

Why this report?

There is a well-known disconnect between research and practice in education. Education practitioners and policymakers continue to make little direct use of research findings to drive state, district, school, and classroom decisionmaking (Asen, Gurke, Conners, Solomon, & Gumm, 2013; Burkhardt & Schoenfeld, 2003; Finnigan & Daly, 2014; Fusarelli, 2008; Hess, 2008; Kochanek & Clifford, 2014; Lagemann, 2002). For example, studies of central office administrators have found that they most often considered budgetary, political, and administrative issues when framing policy discussions, suggesting that the practicalities of district governance, rather than evidence, set parameters for decisionmaking (Burkhardt & Schoenfeld, 2003; Fusarelli, 2008; Lagemann, 2002).



Institute of Education Sciences
U.S. Department of Education



One promising pathway to bridge the disconnect between research and practice is to form research alliances. Research alliances involve researchers and practitioners as collaborators throughout the research process, from the initial design of the work through the interpretation of findings. Including practitioners on a research team can bridge the research-practice divide, increasing the likelihood that research findings will be applied to practice and, conversely, the likelihood that research will be informed by practice (Coburn & Stein, 2010; Roderick, Easton, & Sebring, 2009). Although collaborative research efforts are increasing slowly as education practitioners, policymakers, and researchers see the benefits in sustained research alliances, there are still far too few high-quality collaborative research alliances to fully address the disconnect between research and practice (Kochanek, Scholz, & Garcia, 2015; López Turley & Stevens, 2015). More of these alliances likely do not exist because of structural and individual challenges inherent in the work of collaborative research.

The 2012–17 Regional Educational Laboratory program required the development of research alliances that are intended to connect practitioners, researchers, and policymakers around regional education challenges. These research alliances were tasked with addressing the challenges through regional research, technical assistance, and engagement projects. The Institute of Education Sciences funded the Regional Educational Laboratory program, and its 10 Regional Educational Laboratories, in turn, developed and supported more than 70 research alliances. During 2012–17 Regional Educational Laboratory (REL) Midwest supported eight of these alliances in its seven-state region (Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, and Wisconsin).

An obstacle to high-quality collaborative research is the shift in perspective that researchers must make when moving from a traditional research paradigm, with the researcher as expert, to the collaborative research world, with the researcher as partner. This report describes how and why a professional learning community helped REL Midwest researchers address challenges that came with this shift in the researcher's role and work processes. During the second year of its five-year contract, REL Midwest formed a professional learning community for eight of its researchers, who met quarterly over the course of approximately two years to identify the challenges they experienced in collaborative research, seek resources (such as readings and the expertise of their colleagues) to identify potential solutions, and apply those solutions to overcome the challenges they experienced in their work with the research alliances. The focus of discussions for this professional learning community was on the structures and processes for building relationships among researchers, practitioners, and policymakers to keep research projects relevant and produce more useful products.

Although a professional learning community is one method for facilitating a researcher's shift from expert to partner, this shift may not be due to a professional learning community alone. However, a professional learning community can be instrumental in easing the shift from expert to partner because it can increase opportunities for collaboration and make clearer the importance of the shift. A professional learning community is also an intermediate step toward the long-term goal of creating high-quality collaborative alliances. A professional learning community places researchers together to identify problems and work toward answers. These answers can then be applied to research alliance work.

This report describes the lessons learned about the common challenges that REL Midwest researchers brought to the professional learning community, the strategies they identified to address the challenges, and the tools they used to overcome the challenges. The intent is to inform others working with research alliances (such as Regional Educational Laboratory staff, academics, and graduate students) as they work to build researchers' capacity to engage in authentic collaboration with their practitioner partners.

Researchers often encounter challenges when working within collaborative research models

Collaborative research requires skills that are not typically nurtured in graduate school training or professional settings for education researchers. Researchers are typically trained to be the experts and are often called on to advise practitioners. The research alliance structure requires a breakdown of the traditional power dynamics between expert researcher and practitioner. Researchers must shift their mindset to recognize that although their expertise remains critical, practitioners' expertise is equally valuable. Researchers also need to learn how to hear and leverage their collaborative partners' expertise. For example, REL Midwest researchers had to learn how to listen more closely to the alliance members' needs, ask clarifying questions, reflect back what they heard to make sure they could articulate an understanding of the practitioners' needs, and seek their practitioner partners' advice throughout the lifecycle of a project.

Embedded in this fundamental shift to value and solicit practitioner expertise are several challenges for researchers. The following is a review of the top challenges faced by REL Midwest researchers as they engaged in their research alliance work. As the research alliances were getting underway, the researchers' first challenge was adjusting to their changing role and responsibilities. With more clarity about their role, the researchers next shared challenge was how to engage in consistent, meaningful interactions with their practitioner partners. Finally, as the partnership and the research progressed, researchers were challenged by the need to develop research products that were relevant for their intended audience.

Challenge 1: Adjusting to changing roles and additional responsibilities

REL Midwest researchers did not have a common understanding of how the alliances afforded them opportunities to engage deeply with the alliance members to conduct more relevant and useful research. They also did not fully understand how the alliance work would require them to invest in the human side of the alliance to build alliance members' capacity to access, conduct, and use research. The researchers were trained to develop research projects driven by and in response to what had been published in the academic literature or described in a call for proposals. As experts, they sought to conduct work that further honed their expertise and had implications for practice and future research. They had little experience negotiating with partners about how to develop long-term research agendas and co-conduct research projects with practitioners. Their work with education stakeholders had often been limited to requesting access to data, recruiting schools for studies, training educators to implement interventions, and advising on issues related to their areas of expertise. Understanding, and then accepting, the need to navigate a shift in mindset from expert to partner was a challenge.

Challenge 2: Planning for and engaging in consistent, meaningful interactions

Many researchers struggled with how to engage with alliance members in a meaningful way when the alliance members were waiting for research results. During meetings with alliance members the researchers often defaulted to providing project updates. Although conversations about projects were important, the alliance members were looking for immediate answers to their challenges. Members were seeking ways to learn about the policy landscape on a particular issue. They wanted to connect with others in the alliance who held similar positions in different states and districts who may have faced and overcome similar challenges. The initial alliance meetings were not always designed with the members' additional needs in mind.

Challenge 3: Developing products that speak directly to their intended audience

REL Midwest researchers' formal graduate training taught them to write rigorous, detailed reports about their work. These reports typically help other researchers understand a study's underlying theoretical framework, design, methods, analysis, results, and potential implications. Although these reports help advance the literature, they do not always serve the needs of research alliance members or other interested audiences. For example, the reports' length and technical jargon often fail to speak to practitioner or policymaker audiences. The reports also require the alliance members to distill the information into a usable format, if they are to share it with colleagues and other stakeholder groups.

How do professional learning communities for researchers address these challenges?

Although there are multiple ways to support researchers working in research alliances, REL Midwest decided to develop a professional learning community to address the challenges. The development and implementation of a successful professional learning community mirrors the successful development and implementation of a research alliance. In both professional learning communities and research alliances, researchers must value and solicit input from all partners, meetings must be meaningful and engaging, and relevant tools and products need to be developed to solve problems. Like participants in research alliances, participants in professional learning communities benefit from learning to trust and share openly with one another. Through the professional learning community, REL Midwest researchers, some of whom had been isolated from their colleagues while focusing on their research work, became part of the same social network and ultimately trusted sources of information for one another. Therefore, the social support and parallel processes made a professional learning community a clear pathway for REL Midwest to articulate and resolve challenges faced by researchers in research alliances.

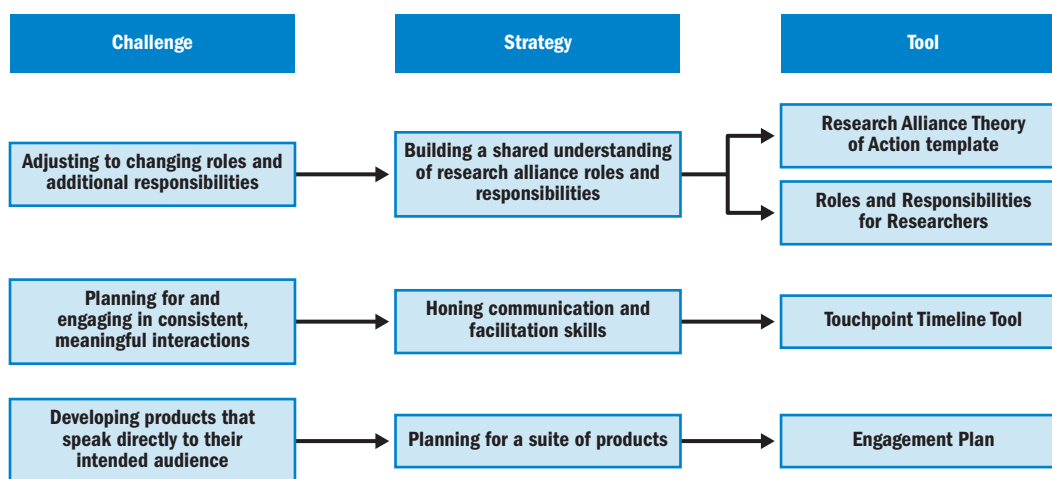
The notion of building professional learning communities is not new. They are embedded across the education field. In schools, districts, and regional education agencies, efforts are being made to improve the ongoing learning environment of educators to improve student outcomes (Darling-Hammond, Wei, Andree, Richardson, & Orphanos, 2009). The broader goal within REL Midwest's work was similar: to create structures and conditions that support collaboration and ongoing improvement in collaborative research and its products. Several key tenets of professional learning communities apply to any organization working to support its staff members' professional growth. These include the notion that to develop professionally, staff need to be working within a culture of collaboration, with a key focus on the issues and struggles that those staff face and the opportunity to share and discuss successful and unsuccessful practices (Annenberg Institute for School Reform, 2004; DuFour, 2004).

Professional learning communities provide important opportunities for education professionals to develop a shared vision and identify actionable steps to improve their professional practices (Buffum & Hinman, 2006; Louis & Marks, 1998; Norwood, 2007). As part of the professional learning community launch, REL Midwest drafted three goals for the researchers in the professional learning community to review and improve on. The professional learning community members decided on the following final goals:

- Build a community of researchers who work together with REL Midwest leadership to hone collaborative research skills that will engage research alliance members with research and its outcomes.
- Develop and customize tools, protocols, and processes that researchers can routinely use as they work with alliance members.
- Share challenges, potential solutions, and successes related to the research alliance work with one another.

With a clear, concise list of shared goals designed to overcome the challenges outlined earlier, the professional learning community identified the strategies and tools it would need (figure 1).

Figure 1. Challenges, strategies, and tools identified and developed in the Regional Educational Laboratory Midwest professional learning community



Source: Regional Educational Laboratory Midwest.

Strategy for addressing challenge 1: Building a shared understanding of a research alliance roles and responsibilities

To help the researchers understand their role in a research alliance, it was first necessary to develop a joint understanding of the purposes and features of research alliances. To generate ideas the professional learning community members recorded their responses to two questions: “What do you think are the general goals of a research alliance?” and “What are the most critical features that would allow a research alliance to meet those goals?” The researchers posted their responses on a wall and began to sort them into groups of related responses. They soon saw where their notions of a research alliance aligned with others’ and where they differed. The conversations that grew out of this exercise laid the foundation for all future professional learning community meetings. Gaining a common understanding and language for the purposes and key features of research alliances provided a platform for generating discussion among researchers about their common role. Also, by building a shared understanding of their role, they were able to better understand how collaborative research differed from their traditional researcher training. Over time, they would come to turn to one another to gather new ideas on how to approach their work with alliance members.

Professional learning community members used two documents to support their efforts to articulate alliance goals and their specific roles and responsibilities: one related to a theory of action and the other related to researchers’ roles and responsibilities. These documents helped the researchers make a fundamental shift from thinking about their research in isolation to working in an alliance with practitioners and policymakers.

Research Alliance Theory of Action. The researchers developed a theory of action for each alliance. This enabled the researchers to articulate an overall vision for the research alliance, identify potential resources and types of activities they could engage in with the alliance members, and define the anticipated short- and long-term outcomes of the alliance and its work.

Most researchers were challenged by thinking about how a particular alliance could have its own theory of action. The REL Midwest researchers’ formal training taught them to design theories of action related to specific studies’ interventions and intended outcomes. They were not trained to think about how the partnership itself could be guided by a theory of action. Thinking about the alliance’s work beyond a specific project enabled the researchers to envision a trajectory for the work and see it from a different perspective

while also beginning to process the kind of time allocation that would be necessary to meet their goals. For a more detailed description of the Research Alliance Theory of Action, see box 1. For a theory of action template and a completed example, see appendix A.

Roles and Responsibilities for Researchers. After completing a research alliance's theory of action, researchers had a more concrete visual representation of how their work influenced the alliance's short- and long-term outcomes. In the activities component of the Research Alliance Theory of Action, they saw that the collaborative aspect of this work requires researchers to go beyond conducting rigorous, high-quality research that is on time and within budget. The professional learning community setting provided a safe space for researchers to push each other's thinking about how collaboration required researchers to change their approach to the research process by completing activities that went beyond their traditional research.

Specifically, they discussed activities such as the need to make room for the expertise of their practitioner partners, to design research projects that will directly address the alliance members' needs, to ask for

Box 1. Components of Regional Educational Laboratory Midwest's Research Alliance Theory of Action

The Research Alliance Theory of Action template first asks researchers to articulate the needs that an alliance is designed to address and consider any contextual factors that may influence how to address those needs with alliance members. Then the theory of action itself includes the following components: resources, activities, products, and benefits.

Need and context

Addressed need. Researchers describe the problem, issue, or challenge their research alliance hopes to address. Whom is the alliance helping? What is it helping them do or understand? The statement should go beyond simply describing the research focus of the alliance, and instead capture its central purpose or purposes.

Contextual factors. Researchers describe any contextual factors that may shape the strategies and activities of their research alliance. These may include geographic reach, alliance members' professional roles, and leadership changes.

Theory of action components

Resources. Researchers describe the resources available for their alliance. These may include alliance members with particular skills or interests as well as other types of resources. Members can play different roles in an alliance: champions of particular issues or programs, stakeholders who will benefit directly from the researchers' work, advisors who can provide valuable feedback on ideas and products, learners who are interested in professional development, and spanners who can bring the work of the alliance to a larger network of people. Researchers list each member of their alliance and the role they think they may play.

Activities. Researchers describe the main activities their alliance will conduct. Activity types include strategic planning, support and technical assistance, and research. Researchers may list several activities under each type, and add additional activity types as necessary.

Products. Researchers describe the specific products that their research alliance will produce. Product types may include reports, workshops, and tools. Researchers may also add additional product types as necessary.

Benefits. Researchers describe the short-, medium-, and long-term benefits their activities and products will produce. How specifically will their alliance assist stakeholders? How will it address the general need the researchers described earlier in the Theory of Action?

feedback about data collection methods from their practitioner and policymaker partners, to request input about the implication of results, and to co-develop a strategy for sharing the results of the work with the alliance members. The researchers then took these additional activities, along with those they traditionally were required to complete (such as conducting the work on time and within budget and communicating with their internal colleagues), and developed the Roles and Responsibilities for Researchers document. The researchers articulated five overarching responsibilities to encapsulate the activities (see box 2).

Strategy for addressing challenge 2: Honing communication and facilitation skills

Some researchers had early success in working with the alliance leads to make the alliance meetings more dynamic and valuable. During professional learning community meetings researchers shared how they worked to create opportunities for balancing different alliance members' voices and how they considered different formats of meetings for various purposes. Researchers also discussed the need for consistent, meaningful conversations and how to structure interactions to support them. Some researchers shared their successes in seeking out and providing their partners with relevant and useful resources to inform their decisions, practices, or policies while they waited for the specific results from the alliance's projects. For example, some researchers developed brief literature reviews and policy scans to provide the alliance members with available evidence that could be used to inform their immediate needs. The professional learning community members turned to facilitation resources (for example, Barker, 2007; Kaner, Lind, Toldi, Fisk, & Berger, 2007) to provide ideas and generate discussion concerning how to make meetings more engaging and productive. Key takeaways from Barker (2007) included the following:

- Make task objectives clear.
- Thank people for their contributions.
- Encourage different points of view.
- Encourage people to cooperate.
- Give people clear task responsibilities.
- Remind the group often of the meeting's objective.

The professional learning community also worked together to list the topics of conversation that would optimally occur between a researcher and the alliance members across the continuum of a research project (from concept proposal to dissemination). This activity encouraged researchers to think more intentionally about why, when, and how they would engage with the alliance members. They discussed the types of conversations that might require a conference call; the circumstances under which a researcher might reach out to stakeholders one on one; and the multiple ways researchers could consider sharing information,

Box 2. Researchers' key responsibilities

Regional Educational Laboratory (REL) Midwest researchers in the professional learning community identified five key responsibilities for working with research alliances. Each interrelated responsibility involves numerous tasks and activities. The five responsibilities are:

- Co-developing research projects.
- Collaborating with alliance members at regular intervals to ensure the project remains relevant.
- Co-designing and supporting the dissemination and knowledge utilization activities in coordination with alliance members, the alliance lead, and the REL Midwest leadership team.
- Establishing and monitoring the project timeline and budget.
- Communicating project progress and challenges to the REL Midwest leadership team and alliance lead.

Note: The alliance lead is the primary point of contact for alliance members. The alliance lead coordinates and facilitates alliance convenings, meets with alliance members one on one to gather feedback about the work, and works with researchers to understand alliance members' needs for additional research support.

collaborating, and seeking input on the work. To aid in this planning, researchers in the professional learning community created and used the Touchpoint Timeline tool.

Touchpoint Timeline tool. This tool asked researchers to lay out each touchpoint or planned communication they anticipated having in the upcoming six months and the specific goal of that touchpoint. They were then prompted to consider who specifically would be involved. Finally, they were asked to consider the mode of the touchpoint: was it necessary to conduct it as a face-to-face meeting (or through video conferencing), or could it be conducted over the phone, or by email? Taking the time to plan the touchpoints helped the researchers organize their upcoming work. This tool pushed the researchers to be more purposeful in planning how their work would respond to (or anticipate) the alliance members' needs. Through the professional learning community the researchers could learn what had been working for their fellow researchers and leverage those successes by embedding them in a purposeful communication plan, using the Touchpoint Timeline tool. For the tool template and an excerpt from a completed example, see appendix B.

Strategy for addressing challenge 3: Planning for a suite of products

As researchers learned more about their new roles and responsibilities and began to hone their communication and facilitation skills, they began to think more deeply about how to work with their alliance colleagues to plan for the research projects' products and how to create a strategy for sharing those products at various stages throughout the life of a project with multiple audiences. The alliance members made it clear that they preferred to learn as much as possible about the project results as they became available. Therefore, the researchers had to learn how to build in time for developing memos and brief presentations to share with the alliance members throughout the project. Once a project was completed, alliance members preferred concise, actionable summaries that described the project, clearly depicted the results with data visualizations requiring little supporting text, and offered guiding questions that the alliance members could consider using with their colleagues to promote discussions about how to use the work to inform future programmatic and policy decisions. The researchers could recognize and appreciate that research reports were not going to serve the alliance members and other key stakeholders, but many researchers had limited experience creating the types of products preferred by the alliance members.

To overcome these uncertainties, REL Midwest researchers invited REL Midwest's engagement team to a professional learning community meeting to train them on alternative, more effective ways to work with alliance members to communicate research findings. With the support of the REL Midwest engagement team and input from the alliance members, REL Midwest researchers learned how to write research briefs developed for the intended practitioner or policy audience that tell a concise yet meaningful story and highlight findings without using technical jargon. They learned how to work with alliance members to develop infographics and videos to communicate information in easily accessible formats, craft debriefing materials and share them with stakeholders to highlight results, and discuss the implications for their specific contexts. Researchers also learned how to collaborate with alliance members to develop tools and ancillary materials to accompany a study and facilitate the use of findings in practice. Finally, they learned how to co-create trainings and workshops based on report findings to better position states and districts in communicating findings and discussing potential implications with school-level personnel.

To support REL Midwest researchers' efforts to discuss, create, and execute these alternative communication strategies with alliance members throughout the life of a research project (in other words, from conceptualization to publication), the researchers also were trained to co-develop Engagement Plans using a template.

Engagement Plan template. This template includes detailed information about key message development, strategies and products to consider, and the assignment of specific tasks to the REL Midwest engagement team staff, researchers, and alliance members. The template should be used at the beginning of a project to ensure the development of cohesive and practitioner-informed communication strategies. The plan is a living document that requires continual review and updates as a project progresses. Researchers use the template during the following study phases: concept and proposal development, preliminary findings, developing a product, product in review or revision phases, and preparing for the public release of the product. The researchers could then take the Engagement Plan and populate the touchpoints needed to execute that plan in the Touchpoint Timeline Tool. See appendix C for the Engagement Plan template.

Closing the knowledge and communication gaps between research and practice

True collaboration between researchers and practitioners is challenging. From REL Midwest's experience, researchers face common challenges when shifting to a collaborative research model—challenges ranging from a lack of training in collaborative research to difficulty in meaningfully engaging stakeholders throughout the research process to a lack of experience in creating diverse product types that meet stakeholders' needs. REL Midwest addressed these common challenges through a researcher professional learning community. Although other types of professional development could have been used to support REL Midwest researchers as they learned more about how to work more collaboratively with practitioners and policymakers, REL Midwest found the professional learning community helped researchers overcome their challenges. Specifically, the professional learning community structure provided a safe and communal space for researchers to discuss the strengths and weaknesses of their past training and experiences and to work together to solve these problems. Further, the tools developed within and alongside the professional learning community provided a common way for researchers to implement their new collaborative research strategies as well as a method for sharing ideas for how to better collaborate across often isolated individual research projects. The professional learning community also offered researchers opportunities to debrief on their experiences using these tools and adapt them as needed, continue to troubleshoot with one another, and reflect on lessons learned.

Most important, the strategies and tools associated with the professional learning community led to changes in the way REL Midwest researchers approached and implemented their work. Through efforts to build education stakeholders' capacity to access, use, and conduct research, researchers felt that they developed collaborative skills that enabled them to facilitate stronger, more meaningful research alliances, co-design and conduct research projects that were more responsive to alliance members' needs, and create research products that empowered members to use the project findings in their decisionmaking processes. These outcomes are crucial steps in closing the knowledge and communication gaps between research and practice. If other researchers apply the strategies and tools used by REL Midwest, they may be positioned to similarly overcome, anticipate, or even avoid common challenges researchers experience when shifting to a collaborative research model.

Appendix A. Research Alliance Theory of Action template and completed example

The Research Alliance Theory of Action template supports researchers' efforts to articulate an overall vision for the research alliance, identify potential resources and types of activities that they could engage in with alliance members, and define the anticipated short-and long-term outcomes of the alliance and its work.

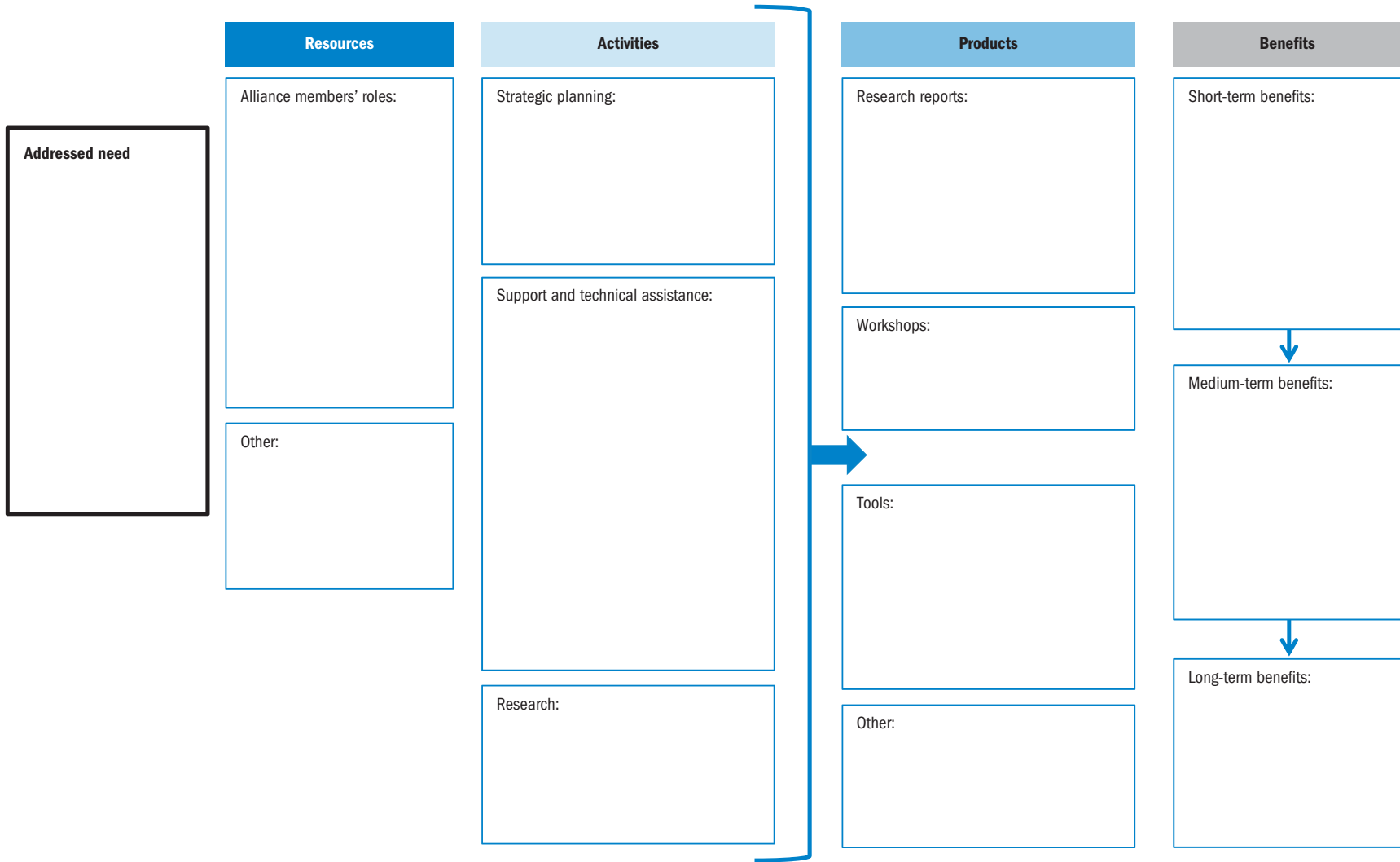
Research Alliance Theory of Action template

Addressed need: In the space below please describe the problem, issue, or challenge your research alliance hopes to address. Whom is the alliance helping? What is it helping them do or understand? Your statement should go beyond simply describing the research focus of your alliance, and instead capture its central purpose(s).

The primary goal of the research alliance is to

Contextual factors: In the space below please describe any contextual factors that may shape the strategies and activities of your research alliance. These may include things such as geographic reach, alliance members' professional roles, leadership changes, and so on.

Figure A1. Research Alliance Theory of Action template



Completed Research Alliance Theory of Action for the College and Career Success Research Alliance

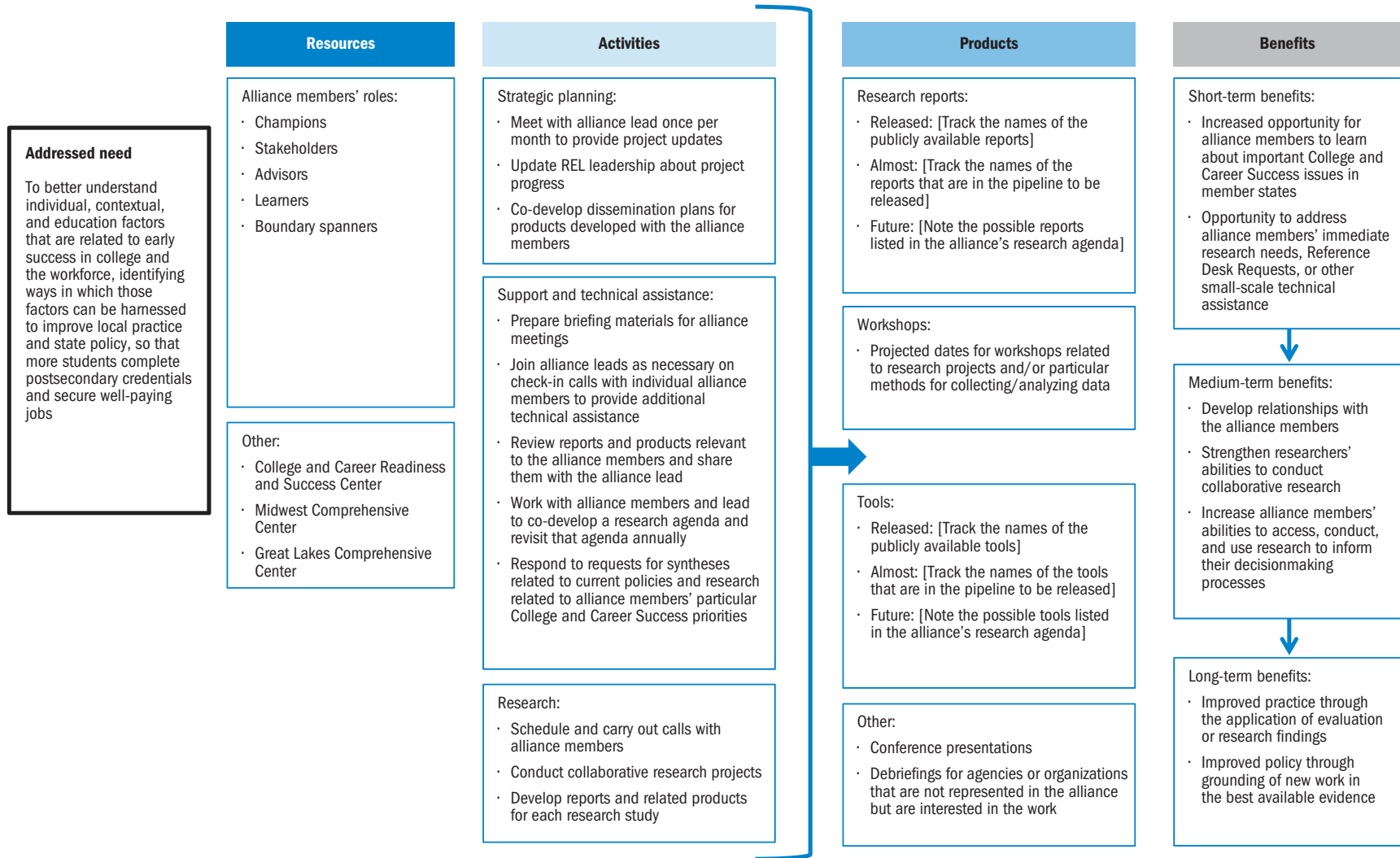
Addressed need: In the space below please describe the problem, issue, or challenge the College and Career Success Research Alliance hopes to address. Whom is the alliance helping? What is it helping them do or understand? Your statement should go beyond simply describing the research focus of your alliance, and instead capture its central purpose(s).

The primary goal of the College and Career Success Research Alliance is to better understand individual, contextual, and education factors that are related to early success in college and the workforce, identifying ways in which those factors can be harnessed to improve local practice and state policy, so that more students complete postsecondary credentials and secure well-paying jobs.

Contextual factors: In the space below please describe any contextual factors that may shape the strategies and activities of your research alliance. These may include things such as geographic reach, alliance members' professional roles, leadership changes, and so on.

The diversity in alliance members' professional roles means our work has the opportunity to be informed by a breadth of perspectives on college and career success, quite literally from school house to state house. However, this means that each activity must be carefully designed and implemented to ensure relevance for a broad audience.

Figure A2. Completed Research Alliance Theory of Action for the College and Career Success Research Alliance



Source: Regional Educational Laboratory Midwest.

Appendix B. Touchpoint Timeline tool template and a completed example

The Touchpoint Timeline tool supports researchers' efforts to be more purposeful in planning how their work will respond to (or anticipate) the alliance members' research needs. Researchers should lay out each touchpoint or planned communication that they anticipate having in the upcoming six months and the specific goal of that touchpoint. Using this tool, researchers should consider who specifically should be involved in each touchpoint and what the appropriate mode of communication should be (for example, a face-to-face meeting, a video conference, phone call, email). The following template is for one month. This blank template could be duplicated for the six month period.

The tool has three sections: strategic planning, support and technical assistance, and research. These three sections align to the activities sections in the Research Alliance Theory of Action template. In the strategic planning section, researchers plan for the types of activities that fall outside of the scope of their project work (for example, meeting with the alliance leads once per month, updating Regional Educational Laboratory (REL) Midwest leadership about project progress, and co-developing dissemination plans for products created with the alliance members). In the support and technical assistance section, researchers plan for the ways in which they are going to engage the alliance members in the technical assistance projects as well as bring value to the alliance members outside of the planned technical assistance projects (for example, reaching out to other researchers to prepare resources to respond to requests from alliance members regarding a particular topic). Finally, in the research section, researchers identify the critical times for connecting with alliance members about the research projects to ensure that the alliance members serve as advisors throughout the life of the projects.

Touchpoint Timeline tool template

Alliance Name: _____

[Insert Month and Year]

Touchpoint Timeline Tool

Strategic planning

Goal	Alliance members/ other stakeholders	Communication mechanism	Indicator of success	Results/ next steps

Support and technical assistance

Goal	Alliance members/ other stakeholders	Communication mechanism	Indicator of success	Results/ next steps

Research

Goal	Alliance members/ other stakeholders	Communication mechanism	Indicator of success	Results/ next steps

A Completed Touchpoint Timeline tool for One Month

Alliance Name: College and Career Success Research Alliance

May 2014

Touchpoint Timeline Tool

Strategic planning

Goal	Alliance members/ other stakeholders	Communication mechanism	Indicator of success	Results/ next steps
Brief new alliance members on research conducted	Alliance members from Wisconsin	Virtual call; send one-page summary of work to date ahead of call	Complete call by end of May 2014	Completed call on May 23, 2014 Next steps: By the end of May, introduce new member to other federally funded centers
Co-develop dissemination plans for research report to be developed with the alliance members	Alliance members from Wisconsin and Minnesota	Virtual call; send engagement template ahead of call	Articulate at least one dissemination strategy for each of the two alliance members' states involved in the project by end of May	Completed call on May 27, 2014 Next steps: By the end of May, schedule a follow-up call with alliance members and the stakeholders they identified to discuss draft plan

Support and technical assistance

Goal	Alliance members/ other stakeholders	Communication mechanism	Indicator of success	Results/ next steps
Work with alliance lead to prepare briefing materials for alliance meeting	Not applicable	Slides to be shared during the virtual alliance meeting	Complete draft of briefing materials by May 6, 2014	Shared slides with alliance members Next steps: By May 30, 2014, revise briefing materials so they incorporate members' feedback and may be used by alliance members with a broader audience, when appropriate

Research

Goal	Alliance members/ other stakeholders	Communication mechanism	Indicator of success	Results/ next steps
Co-develop a proposal to build on current research project with Minnesota and Wisconsin	Alliance members from two of the alliance's five states (Minnesota and Wisconsin)	Phone call; send a summary of potential project ideas to support initial brainstorming conversation	Complete call with one or two proposal ideas by May 9, 2014	Shared proposal ideas with alliance lead and Regional Educational Laboratory Midwest leadership team Next steps: Share proposal ideas with the other five alliance members by May 23 and request feedback by May 30

Appendix C. Engagement Plan template

The Engagement Plan template can be used to develop a comprehensive strategy to communicate about a particular study or project. Researchers and alliance members should complete this template early in the planning process to outline engagement activities, including specific tactics and task owners. An Engagement Plan may include some or all of the engagement activities outlined below, but all activities should be part of the discussion. In addition, specific engagement platforms might be better mechanisms than others to discuss a project and its implications.

Message development

Key messages. What are the most important takeaways from your report?

Task owner: _____

Key messages: _____

Events and briefings

Alliance outreach. Consider holding briefings with alliance members to discuss the report's findings and ways to utilize them, as well as communication and knowledge-sharing tactics and with alliance members' organizations. Consider contacting alliance members to let them know about the report's release and to request their assistance to promote it. Provide them with the full report, brief summary (if available), infographic, draft language, and sample tweets and Facebook posts.

Task owner: _____

Strategies: _____

Briefings and workshops. Consider briefings with individuals, groups, and organizations outside of the alliance. Determine whether a workshop or training would be an appropriate mechanism to share and assist in the use of the findings. Identify key audiences such as district- or school-level staff.

Task owner: _____

Strategies: _____

Conferences. Submit proposals for relevant conferences. Consider practitioner-oriented conferences.

Task owner: _____

Strategies: _____

External outreach

Partner outreach. Contact partner organizations to let them know about the report's release and to request their assistance to promote it. Provide them with the full report, brief summary (if available), infographic, draft language, and sample tweets and Facebook posts. List targeted groups and organizations in this section of the plan.

Task owner: _____

Strategies: _____

Influencer outreach. Contact research, policy, and advocacy groups to let them know about the report's release. These groups may share the report with their followers through newsletters, blog posts, and other communications. Provide them with the full report, brief summary (if available), and infographic. List targeted groups and organizations in this section of the plan.

Task owner: _____

Strategies: _____

Media outreach. Many news outlets no longer accept typical press releases. Organizations often prepare electronic newsblasts to announce product releases, upcoming events, and other important news. Editors and reporters may subscribe to relevant newsblasts to identify potential stories. List potential media outlets in this section of the plan. Target outlets should span newspapers, online, radio, and television.

Task owner: _____

Strategies: _____

Editorial content

Newsletter or news flash. Consider opportunities to include the report in the alliance-specific newsletter and/or create a one-off mailing to send to REL Midwest's general distribution list.

Task owner: _____

Strategies: _____

Blogging. Explore blogging opportunities with partners and external organizations and outlets that accept contributed articles.

Task owner: _____

Strategies: _____

Publications. Submit contributed articles to relevant journals. Submit articles to other publications.

Task owner: _____

Strategies: _____

Website and social media

Website. Consider opportunities to update the REL Midwest website about the work.

Task owner: _____

Strategies: _____

Social media. Develop tweets, create custom images that pull from the infographic, and draft Facebook posts for alliance members and partner organizations. Support outreach efforts by tweeting at identified groups, organizations, and media outlets about the report.

Task owner: _____

Strategies: _____

Video development

Video. Create a video highlighting the report's findings and consider where the content may be posted.

Task owner: _____

Strategies: _____

Data visualization

Infographic. Create an infographic or other visual collateral to accompany the report.

Task owner: _____

Strategies: _____

Additional products

Stated Briefly. Write a brief summary of the report.

Task owner: _____

Strategies: _____

Tools. Develop tools for districts, school-level staff, or other stakeholders to utilize along with the report.

Task owner: _____

Strategies: _____

Note

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