

# Capacity-Building for Sustainability: A Cooperative K-12 Regional Education Service Provider Case Study

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## ABSTRACT

An American K-12 cooperative educational services provider (“The Agency”) has an issue: partner school districts are saving money by building internal capacity for professional development, rather than fully utilizing expertise from the Agency. The aim of this evidence-based case study is to inform the Agency on capacity-building for innovation. The researchers performed three separate rapid evidence assessments, followed by a standard systematic review process to synthesize findings across 31 studies. Key findings identified from the research include (1) organizational capacity and program evaluation lead to organizational sustainability, (2) agency leadership should guide strategic organizational change in order to establish a shared vision for evaluation and feedback, and (3) organizations benefit from practicing continuous and ongoing learning through feedback loops. The findings of this study may be generalizable to other similar educational service providers or non-profits looking to strengthen organizational capacity and partnerships.

## KEYWORDS

Assessment, Capacity-Building, Education, Evaluation, Feedback Loops, Innovation, Rapid Evidence Assessment, Support, Sustainability, Systematic Review

DOI: 10.4018/IJTESS.20200101.oa1

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## INTRODUCTION

Partnerships between school districts and regional educational service and support providers are common but can be fraught when partner schools develop their own internal capacity and begin providing their own support services. How can cooperative educational service providers adapt, innovate, become sustainable and continue to provide needed services for partner schools? This case study outlines the organizational assessment and background of a non-profit education sector organization (“The Agency”) experiencing a decline in its school partnerships and utilization of its services. Focusing on the organization’s situation, a case study is an appropriate method for analyzing the current organization’s situation and answering the research question (Yin, 2012). The researchers define the organizational problem and research questions regarding evaluation capacity building, feedback loops, and leadership strategies. The study documents the research methodology and provides findings, recommendations, implementation plans, risks, and implications for management.

### Background

The Agency is a regional educational service center (RESC) for twenty-five school districts in the Northeastern United States. RESCs are non-profit, fee-for-service, public education service providers that exist to improve public education through high quality, cost-effective programs and services by developing solutions to the most pressing needs of member school districts. As of the 2016 - 2017 fiscal year, the board of directors and extensive programs of the Agency involve more than 980 staff members in 19 facilities working with a budget of \$87,000,000. The Agency generates most of its income in two ways: (a) fees paid for services by member school districts (75%), and (b) from State, Federal and foundation grants (19%). The Institute is a division of the Agency that provides specific services including professional development and school improvement services, is responsible for the Agency’s data team, grants management, program development, and talent development. This study is the culmination of research and a systematic review of scholarly literature to help answer the research question and formulate practical recommendations for the Agency.

### Organizational Assessment

Kong (2008) states that strength, weakness, opportunity, and threat (SWOT) analysis supports management’s strategic framework when used as a tool (p. 283). Table 1 represents the SWOT analysis of the Agency.

What makes the Agency unique is its professional services and connection with its community. This is one of the areas in which the Agency has strength, as evidenced by a client interview and a survey conducted to gain insight into customer preferences of their services (Hanover Research, 2019). The findings of this study suggest that the community is happy with the professional services but are not satisfied with the cost of professional services provided by the Agency.

**Table 1. Agency SWOT analysis**

Strengths	Weaknesses	Opportunities	Threats
Long history/ relationship with the community	Overutilization of consultants	Create a feedback loop of communication and transparent processes	Getting buy-in from internal and stakeholders
Professional services/program	High price of professional services	Reduction of professional service prices	Schools are building professional services
Potential for organizational capacity, with a high degree of human capital	Limited funds to expand organizational capacity	Service to unique demography	Stakeholders rejecting the need to increase organizational capacity and innovation

### Organizational Problem

Several of the school districts who partner with the Agency are saving money by building internal capacity for professional development, rather than fully utilizing expertise from the Agency. As a result, the Agency is having difficulty in sustaining and expanding its services in the current environment and is looking for ways to expand its school partnerships. Some schools are no longer partnering with the Agency for professional development offerings due to the cost. In some cases, professionals who work for the Agency are being hired by school districts, causing turnover issues. This was further supported by a survey conducted by outside consultants hired by the Agency. Hanover Research (2019) reported the following facts:

- Less than half of respondents expect their districts to participate in various programs in the next 12 months;
- Four of nine respondents indicate their districts are no longer participating in behavior services because either another provider was a better fit or the service is being provided in-house; and
- Five of eight respondents are no longer participating in professional development services because they are providing this service in-house, three respondents have seen a decrease in district funding.

Further literature emphasized the importance of school district partners and what they value. Farrell and Coburn (2017), found that school district leaders might opt out of engaging with external partners depending on how much they value the insight or support of outside partners (p. 143).

### Research Question

Based on the defined organizational problem, each of three researchers from the University of Maryland Global Campus conducted a rapid evidence assessment on a separate intervention. According to Barends, Rousseau, and Briner (2017) “A Rapid Evidence Assessment (REA) provides a balanced assessment of what is known (and not known) in the scientific literature about an intervention, problem or practical

issue by using a systematic methodology to search and critically appraise empirical studies” (p. 4). The researchers then combined their REAs to re-define the context, intervention, mechanism, and outcomes (CIMO) (Denyer & Tranfield, 2009) in order to create an overarching research question based on the REA findings. As a result, a new research question was created for this case study:

*How can organizations in the non-profit educational sector use feedback loops and/or innovation strategies to build evaluation capacity for increasing organizational sustainability?*

## **THEORETICAL FRAME**

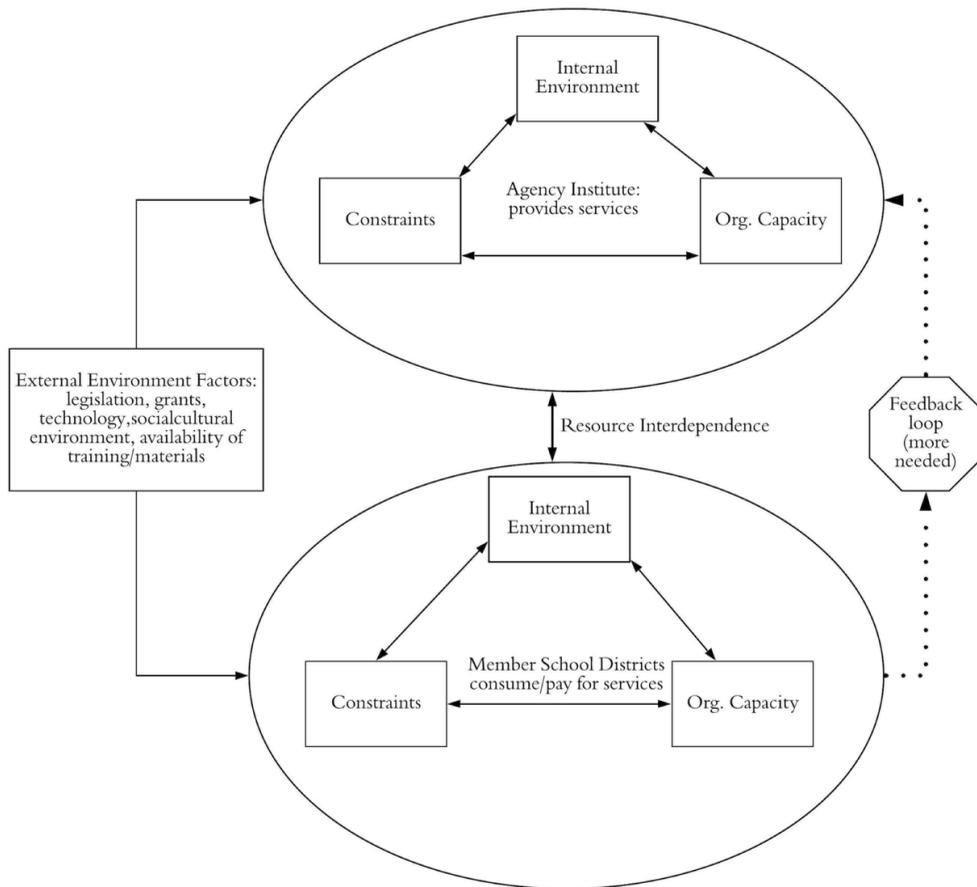
A key part of evidence-based research is grounding the work in theoretical underpinnings. The theory provides the foundation upon which the research question, literature review, methods, and analysis are built (Osanloo & Grant, 2016). The researchers chose resource dependence theory, which “significantly contributes to explaining behavior, structure, stability, and change of organizations” (Nienhüser, 2008, p. 29). In the case of the Agency, its services and resources provided to member schools are interdependent with the schools (see Figure 1).

Schools need to scrutinize how they utilize resources and how much they are willing to pay for services. The survey data indicates that one of the factors school districts are least satisfied with is the cost of the services provided by the Agency. When coupled with changing environmental factors, such as emerging technology and availability of resources, some schools are developing internal capacity to meet their own professional development needs. Thus, they are becoming more independent and utilizing fewer Agency services.

### **Theoretical Lens**

An appropriate theoretical lens to view this problem becomes clear by reviewing the relevant literature. This systematic review identified four key factors leading to the creation and implementation of an evaluation framework for organizations. These factors lead to increased organizational capacity and sustained services for partners. The factors include (1) leadership guiding vision, strategy setting and establishing financial and human resources necessary to implement in the organization (Alaimo, 2008; Andersson, Faulk & Stewart, 2016; Heckmann, Steger & Dowling, 2016; Sorrells, 2018); (2) conduct a pre-assessment and self-assessment to ascertain what human, financial and other types of capital exist or are needed (Sorrells, 2018; Williams-Gray, 2016); (3) provide continuous organizational learning (Farrell & Coburn, 2017; Raynor, Blanchard & Spence, 2015); and (4) establish feedback loops such as ongoing surveys, in order to ensure that stakeholders’ viewpoints and feedback are folded into the organization’s plans (Grack Nelson et al., 2018; Lawrenz, et al., 2018). Together these factors help establish a systematic evaluation framework, which leads to increased organizational capacity and sustained service with partners. Viewing the

Figure 1. Theoretical frame: Resource dependence theory as applied to the agency issue

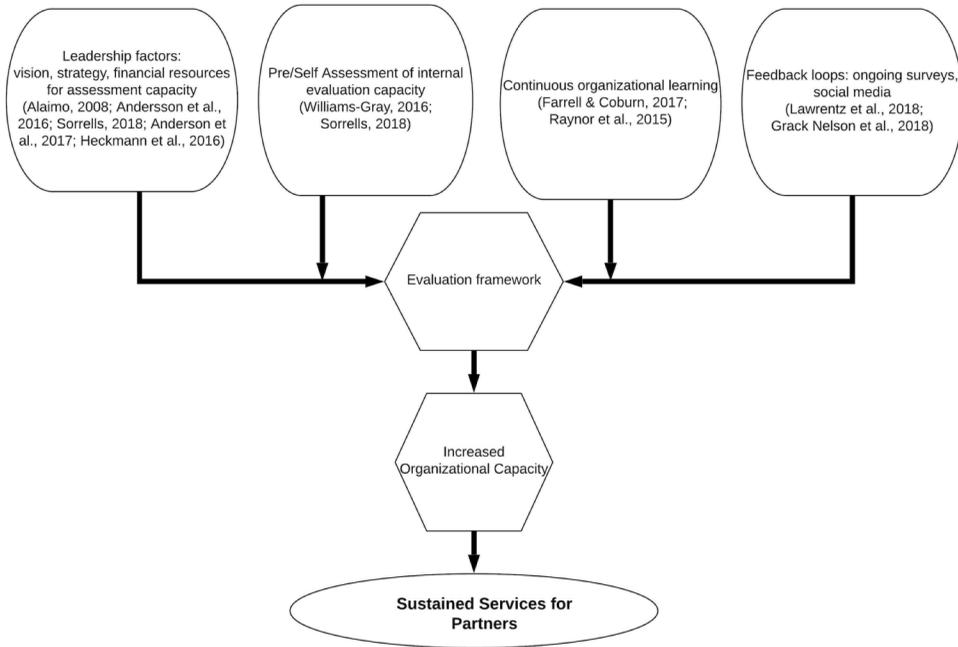


problem through the lens of scholarly literature of other similar organizations informs the understanding of the problem. See Figure 2 for the visualization of the issues.

## METHODS

The methodology utilized for this project is a systematic review grounded in evidence-based management research. The researchers utilized this methodology because of the advantages presented by systematic review in the rigor and transparency of the overall review process as noted by Dixon-Woods, et al. (2006). Following the standard stages of a systematic review, the researchers (1) developed a user-driven research question; (2) developed a review protocol; (3) conducted a comprehensive search for evidence; (4) applied inclusion/exclusion criteria; (5) conducted a quality assessment; (6) extracted data; and (7) synthesized findings (Harden & Thomas, 2005). The researchers created database search strings to locate scholarly journal articles to assist with answering the research question. Retrieved articles were screened with specific criteria for inclusion and exclusion from the study to best answer the research question. The articles that fit

**Figure 2. Conceptual model: Conceptualization of organizational capacity based on literature and applied to the agency situation**



the research question were analyzed and appraised for their qualities of transparency, accuracy, purposivity, utility, propriety, accessibility, and specificity, or TAPUPAS (Pawson, Boaz, Grayson, Long, & Barnes, 2003).

The three researchers conducted thematic coding of their articles and generated findings and recommendations using rapid evidence assessment. The researchers then exchanged article sets, conducting a second level of rigor and validation by appraising, coding and comparing notes, or thematic synthesis, as it is known by Gough, Oliver, and Thomas (2012). Thematic synthesis is a process of coding, developing descriptive terms and generating analytical themes. Each researcher provided a set of primary findings and recommendations. These were further analyzed for commonalities and aggregated to a set of three findings, three recommendations, and a detailed implementation plan.

### Identification of Evidence

In order to perform a thorough search to answer the research question, the researchers developed a search strategy. They executed a database search using keywords and Boolean logic to discern results which included the following search strings: “nonprofit education AND innovation”; “feedback loop”; “capacity building”; “organization capacity AND organizational capabilities”; “feedback loop” non-profit; and “feedback loop” “capacity building” theory resource non-profit education.

The researchers searched using the University of Maryland Global Campus (UMGC) OneSource, which is a collection of several databases, including Academic Search Complete and ERIC. Another database utilized was the ProQuest ABI/INFORM.

The researchers performed a high-level cursory review of the title, abstract, and results of over four hundred articles for relevance to the research question. Inclusion and exclusion criteria were set based on the research question. After performing a rigorous search, the results yielded thirty-one articles. The articles were critically appraised to determine the level of validity and relevance to the research question. Each article was assessed by two researchers and scores were then totaled to provide an overall TAPUPAS score.

## **FINDINGS**

Following evidence appraisal, the researchers conducted inductive coding on all articles. Each researcher read and coded approximately ten articles then swapped articles for additional review. A second researcher read and coded each set of articles, thus adding to the rigor of the article appraisal and coding. This process allowed themes to emerge across articles. These themes include organizational capacity, leadership factors, and feedback loops.

### **Theme 1: Organizational Capacity**

Organizational capacity and program evaluation were themes that emerged from the article findings. A case study by Andersson et al. (2016) provided insight into the nature and process of capacity building in the non-profit sector. The authors argued that organizational capacity building is a targeted approach used in organizational development to meet a specific need, but cautioned that there is no one-size-fits-all approach to organizational capacity (p. 2863). Further, they maintained that each organization goes through different stages of capacity for organizational sustainability throughout its life-cycle. Heckmann et al. (2016) posited that program evaluation should be implemented as a routine measurement because “the more a routine is applied, the more it is associated with success” (p. 780). Williams-Gray (2016) took a cross-sectional study approach and concluded that organizational capacity must link to continuing quality improvement and services. The author asserted that capacity strengthens an organization’s effectiveness and sustainability (p. 103). Thus, building and increasing organizational capacity allows the organization to better deploy its services in pursuit of its vision and goals.

### **Theme 2: Leadership**

A second key theme was the overall involvement of leaders in establishing the vision for organizational culture related to evaluation, feedback and capacity building. Although this was identified in the research through different facets, such as allowing for innovative culture and building an entrepreneurial mindset (Weerawardena, McDonald & Mort, 2010), the salient finding was regarding executive directors (EDs). According to Alaimo (2008) EDs “who recognize the external and internal organizational contexts for program evaluation, and who effectively balance the external pull with the internal push, are more likely to build long-term capacity for

program evaluation” (p. 89). In addition, the research supported guiding strategic direction for organizational change to establish a shared vision for evaluation and feedback (Alaimo, 2008; Andersson et al., 2016; Sorrells, 2018). Leadership must plan strategically for evaluation implementation, focusing on human capital and financial capital needed to build capacity and support a culture of learning and assessment (Andersson et al., 2016; Heckmann et al., 2016).

### **Theme 3: Feedback Loops**

A third key theme from the literature was the importance of feedback loops for an effective evaluation framework. The existence of feedback loops was found to mean that information was consistently being shared about the network’s products and practices, including evaluation methods and findings. Such feedback loops have helped organizations fully realize their potential for organizational capacity. This sharing of information can have a positive effect on partners. Borra and Boulton (2017) stressed knowledge swapping between companies and external talents that allows for innovation and the creation of value of new products and services (p. 12). According to Lawrenz et al. (2018) “Together, these aspects made partners open to trying out new products and practices” (p. 56). This is further supported by Grack Nelson et al. (2018) who reported that the organization could adjust their practices based on partners’ feedback and needs, revising goals for moving ahead accordingly. Thus, establishing feedback loops and implementing processes for reviewing findings and managing change is an important part of the overall culture of assessment.

## **DISCUSSION**

The predominant themes found across the articles assisted the researchers in understanding the current organizational situation of the Agency. The problem is that organizational capacity has been hindered due to the need to conduct evaluations and gather feedback on an on-going basis. By doing so and responding to the feedback, the organization can ultimately move toward a culture and vision of assessment and organizational learning, which promotes sustainability.

It is critical to connect the overall organizational strategic goals to assessment and capacity building. The leadership role drives the charge for ensuring that organizational values are aligned with the culture. As a result, the key findings identified the importance of leadership spearheading the vision of change throughout the organization. In other words, leadership must guide the strategic direction for organizational change in order to establish a shared vision for evaluation and feedback (Alaimo, 2008; Andersson et al., 2016; Sorrells, 2018). In addition, leadership should plan strategically for evaluation implementation, focusing on human capital and financial capital needed to build capacity and support a culture of learning and assessment (Andersson et al., 2016; Heckmann et al., 2016).

Feedback loops are foundational to organizational capacity building. Therefore, we conclude that this is a vital aspect for the Agency. Organizations that practice

continuous organizational learning and support learning through on-going feedback loops can foster information flow between internal and external partners (Alaimo, 2008, p. 76). This information flow is critical for organizational learning and capacity building.

The findings suggest that program evaluation leads to organizational sustainability and increased capacity. Organizations that focus on human capital and financial needs can leverage their organizational capacity. Furthermore, closing the assessment loop between internal and external stakeholders helps them become more viable. The case study findings support the theoretical assumption that organizations in the non-profit educational sector that adopt feedback loops and innovative strategies can increase organizational sustainability in an unstable environment.

### **Implications for Management**

The research suggests the Agency should build a systematic and comprehensive system for gathering feedback and data, creating a culture of organizational learning. Additionally, the Agency should conduct a self-assessment to understand its current state, and leadership must convey the vision and strategy of comprehensive assessment systems in the organization. Before organizations can change and adapt, they need to have developed capacity, both in financial and human capital. In addition, organizations need leadership to have a clear and comprehensive vision for assessment and incorporating feedback from stakeholders as a central pillar. Alaimo (2008) notes, “long-term capacity is evident when program evaluation is embedded in the organization’s culture as a basic assumption. Leadership is therefore fundamental to investing in the organization’s capacity for and utilization of program evaluation” (p. 89). These findings answer the research question explored by the researchers by highlighting ways non-profit organizations in the educational sector can build evaluation capacity and increase sustainability with feedback loops.

### **Recommendations**

The first recommendation based on the researchers’ primary findings is for the organization to conduct pre-assessment/self-assessment. It is recommended to create an action plan for organizational assessment that includes all stakeholders (i.e., leadership, staff, and partners) as an integral part of assessing organizational readiness for change. A pre-assessment allows the Agency to learn about the current state of the company through self-study. Such assessment enables the organization to evaluate its organizational capacity and focus on areas that need improvement.

The second recommendation is to foster an organizational culture for on-going evaluation and capacity building. In order to achieve this, leadership must create a shared vision across the organization where continuous evaluation and feedback are viewed as an integral function that supports a culture of learning. Leadership must also develop and invest in their change management capacity. For example, leadership must focus on the human and financial capital necessary to build capacity and create a culture of utilizing evaluation for continuous improvement. This may include creating

new positions or restructuring the organization for new roles that focus on assessment, evaluation and/or data analysis.

A third recommendation is for the Agency to develop collaborative strategies for program innovation through feedback loops that purposefully seeks to evaluate services, processes, programs, and training needs. This approach will strengthen internal and external networks using technology tools for collaboration, knowledge sharing and collection of feedback.

## **Implementation Plan**

This case study integrates an approach for organizational self-assessment to assess capabilities, program evaluations, and feedback loops as a mechanism that will lead to sustainability. Based on the findings and recommendations, the researchers recommend the following three-part implementation plan.

### *Part One*

Pellettiere (2006) argues that organizational self-assessment is a logical precursor to planning and implementing any large-scale transformation effort (p. 40). A rigorous organizational self-assessment and data collection will allow for an evaluation of Agency programs, professional services, and structures. The researchers recommend the use of an external consultant to use the “Non-profit capacities instrument” (Shumate, Cooper, Pilny, & Pena-y-lillo, 2017), a research-driven instrument synthesized for measuring capacity in non-profit organizations. Using this, the Agency can perform a rigorous organizational assessment in order to assess capacities in seven key factor areas including financial management, adaptive capacity, strategic planning, external communication, operational capacity, mission orientation, and staff management.

### *Part Two*

The second part of the implementation plan is to utilize an external consultant with subject matter expertise to review the organizational chart and strategic plan; evaluate roles, responsibilities, and current personnel for gap analysis in assessment; and create mechanisms for all stakeholders to build support for assessment culture when collaborating. Leadership must also support the creation of new leadership roles in assessment, hold meetings and create a communication plan that emphasizes the importance of evaluation and feedback loops to the organization’s mission and culture.

### *Part Three*

Finally, the Agency should identify program objectives for measurement and key performance indicators (KPIs) to indicate the definition of success. Using KPIs can facilitate program redesign and lead to program transformation. Based on the outcomes, the Agency can create surveys and both formal and informal feedback loop mechanisms. Further, the agency needs to collect and analyze the data and monitor results against the KPIs, which provide input on areas of improvement. Implementing a feedback loop

allows both the internal and external stakeholders to assess the Agency's objectives to determine if the current plan needs re-evaluation due to a change in the leadership.

### **Risks of Implementation**

The Agency is currently financially constrained due to the lack of federal, state, and local funds/grants, and as such, the risk of using outside consultants will increase the financial burden. In addition, there might be possible resistance from stakeholders due to a lack of funds in implementing the prescribed recommendations above. Scholarly articles have demonstrated that not-for-profit organizations like the Agency tend to have many external and internal stakeholders; in this regard, getting buy-in to the recommendations might create a problem. The risk of implementing recommendations may trigger resistance to change from the Agency stakeholders. Consequently, all recommendations prescribed above should be prioritized accordingly and considered as input to the organization's strategic goal and vision.

### **Limitations**

There are limitations that should be noted. This research is based on only one non-profit educational service provider, so generalizability may be limited. Due to the quick turnaround for the REAs conducted by the researchers, it was not possible to assess all potentially relevant literature that fit the research. Next, by only using scholarly peer-reviewed literature, some publication bias could be present. Finally, while scanning and snowballing the article abstracts for relevance, researcher self-bias could be inferred in the inclusion and exclusion criteria. Due to these limitations, the findings identified in the case study should be used as a tool for guidance when ascertaining input for decision-making when addressing issues at the Agency. There was a gap in the current research due to unanswered questions. Which specific professional service prices rendered by the Agency are considered too high by school districts? In which districts are professional services participation lagging? What technology can be used to improve feedback communication? What is the cost for the Agency in expanding its organizational capacity as well as adopting an innovative strategy to gain sustainability? Although a variety of recommendations have been offered in the study, the researchers were unable to answer these questions. Therefore, additional research is needed to answer the current research gap.

### **CONCLUSION**

This case study utilized rapid evidence assessments and a systematic review methodology to identify insights for addressing sustainability issues at a non-profit educational service provider looking to expand its partnerships with area schools in the Northeastern United States. The findings reveal that a culture of assessment and an evaluation framework lead to organizational capacity and sustainability with partners. Further, organizational leadership must spearhead the development of assessment culture throughout the organization. Finally, organizations that practice continuous

improvement and support ongoing learning through feedback loops foster capacity building and sustainability for the organization.

## **ACKNOWLEDGMENT**

The authors acknowledge people who helped the research process: Dr. Marsha Bouchard and colleagues in the Doctor of Business Administration (DBA) 840 cohort. This research received no specific grant from any funding agency in the public, commercial, or not-for-profit sectors.

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