

**Optimizing NewSchools' Impact Metrics for Students with Learning Differences**

Zohra Damani, Daniel Kim, and Kathleen Robinson

Vanderbilt University Peabody College

Dr. Sherard Robbins

July 2024

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## **Part I: Organization Context**

### **Background**

NewSchools Venture Fund (NewSchools) is a nonprofit venture philanthropy organization committed to transforming the K-12 education landscape in the United States. The organization's mission and multifaceted activities pivot around several critical areas, encapsulating its impact on education. NewSchools acts as a bridge, forging connections between individuals and organizations harboring financial resources and those proposing innovative ideas in education. Their core goal is to ensure that capital flows seamlessly toward pioneering education projects that hold the potential to catalyze transformative change.

### **History and Financial Impact**

Over its 25-year history, NewSchools has invested over \$400 million in nascent education innovations. This financial backing is designed to usher in positive transformations within K-12 education. NewSchools has committed itself to advancing diversity, equity, and inclusion (DEI) principles into its internal practices and partnerships within the education and philanthropic sectors.

### **Organizational Structure and Operations**

NewSchools relies on a diverse and highly skilled team of professionals to drive its vision forward. The leadership hierarchy includes a CEO entrusted with providing the organization's strategic direction. The core Program and Investment Team is tasked with identifying and evaluating education initiatives and entrepreneurs for investment. This cohort includes Program Directors, Investment Managers, and Analysts, all distinguished by their education, innovation, and venture philanthropy expertise. NewSchools also boasts a dedicated Support and Operations team responsible for executing day-to-day activities, counting among its ranks Human Resources (HR) professionals and Administrative Assistants. Complementing this lineup is the

Communications and Outreach team. This critical component effectively communicates NewSchools' mission and initiatives to a diverse audience, including the public, the education community, and philanthropic partners. This multifaceted group encompasses Communications Directors, Marketing Specialists, and Outreach Coordinators. The critical domains of Finance and Law are managed by a team of professionals overseeing the organization's financial operations, including Accountants, Finance Managers, and Legal Counsel. Finally, NewSchools possesses a wealth of knowledge through its cadre of Education Experts. These experts, with deep-rooted expertise in education policy, research, and pedagogy, serve as instrumental contributors, ensuring that the organization's investment strategy remains aligned with the industry's best practices.

### **Strategic Focus and Achievements**

Recent developments highlight the importance of NewSchools' dynamic approach to philanthropy. In the 2021-2023 period, NewSchools adjusted its strategic focus, investing \$113 million across over 400 ventures, resulting in a 1.5x increase in learning outcomes for impacted students. This period also saw significant advances in diversity, with 62% of NewSchools' ventures led by women and 70% by people of color, underscoring NewSchools' commitment to supporting diverse leadership in education. NewSchools' extensive reach impacts 23 million students and 42,000 educators annually. The organization has effectively scaled its operations, with current funding catalyzing \$490 million, marking significant growth from its initial investments.

A key component of NewSchools' new strategic focus has been the integration of a robust impact assessment process specifically tailored to enhance support for students with learning differences. This focus not only reflects NewSchools' commitment to inclusivity but

also aligns with its operational and strategic evolution to address complex educational challenges. Developing targeted assessment tools and methodologies has been crucial in understanding how different initiatives affect learning outcomes among neurodivergent learners and those with disabilities.

These enhancements to NewSchools' assessment strategies directly contribute to refining educational practices and resources, ensuring that all students, especially those with learning differences, receive the support they need to thrive. By aligning investment strategies with comprehensive impact assessments, NewSchools is better equipped to monitor the efficacy of its portfolio and adjust its approaches based on detailed, data-driven insights. This strategic alignment ensures that NewSchools remains at the forefront of educational transformation, continually adapting to meet the needs of a diverse student population's needs by effectively measuring its initiatives' impact to drive continuous improvement.

### **Future Strategy and Community Engagement**

As NewSchools moves into the next strategic period in 2024-2026, it is poised to deepen its impact across three critical investment areas: Innovative Schools, Learning Solutions, and Teaching Reimagined. These areas are designed to target the core components of educational reform: introducing new educational models, enhancing learning tools, and rethinking teaching methodologies to serve diverse learning needs better. This future-oriented strategy reflects NewSchools' commitment to pioneering educational approaches that accommodate a variety of learning styles and environments.

Central to NewSchools' upcoming strategy is a comprehensive approach to supporting students with learning differences, i.e., those with a diagnosed disability and those who have yet to be identified but are not best served by traditional classrooms. Recognizing the unique

challenges faced by students with diagnosed disabilities and those traditionally underserved by standard educational settings, NewSchools plans to integrate culturally responsive and research-based instructional strategies. This initiative aims to ensure that all investment areas—whether they focus on school models, learning tools, or pedagogical methods—consider accessibility and effectiveness in meeting the diverse needs of these students. In NewSchools’ new Learning Differences Strategy for 2024-2026, NewSchools will be focused on two key priorities: (1) integrating a focus on serving students with learning differences into NewSchools’ three primary investment areas - Innovative Schools, Learning Solutions, and Teaching Reimagined, and (2) continuing to make a small set of direct investments in critical opportunities that fall outside of these areas.

Moreover, NewSchools continues to value and invest in the power of collaboration as a foundational component of its strategic vision. Community Engagement and Partnership Managers play a crucial role, exemplifying NewSchools’ commitment to building and nurturing solid relationships with various educational stakeholders, including schools, community organizations, and other academic entities. This outreach is not merely an adjunct to NewSchools’ work but a cornerstone of its broader mission, enhancing the effectiveness and reach of its initiatives. By intertwining innovative investment strategies with robust community engagement, NewSchools aims to transform educational practices and foster an ecosystem that supports sustained growth and improvement. This forward-looking approach ensures that NewSchools remains a leader in educational philanthropy, continuously adapting to the evolving landscape of academic needs and opportunities.

## **Part II: Problem of Practice**

### **Context and Challenges**

Within the educational sector, NewSchools occupies a crucial position, grappling with the challenge of deeply understanding and effectively communicating the impact of its varied portfolio. This portfolio encompasses a broad spectrum of initiatives, from cutting-edge EdTech solutions to workshops aimed at caregivers, all designed to support students who face systemic barriers such as racism and poverty. Of particular focus for NewSchools are students with learning differences, along with their caregivers, ensuring that these students have access to the necessary support and resources for a fulfilling educational journey.

### **Current Assessment Methods and Gaps**

NewSchools employs several vital methods to assess the impact of their investments in early-stage ventures. The organization distributes annual impact assessment and venture satisfaction surveys, which gather updates on leadership, user demographics, financial growth, and DEI areas to gauge efficacy. Moreover, NewSchools accesses academic outcome data, such as reading and math test scores, to evaluate the direct impact of school-based initiatives.

Community engagement and feedback also play a critical role in validating whether current investments align with school stakeholders' views on essential initiatives for addressing specific educational gaps.

Despite these robust methods, significant gaps must be added to NewSchools' impact monitoring approaches. The organization needs to identify the correct leading and lagging indicators that best capture impact, highlighting a need for refinement. There is no industry standard for assessing impact in early-stage ventures, particularly when tapping into diverse sectors like professional development pipelines and EdTech. Moreover, current approaches need



to be more inclusive and equitable if they genuinely reflect one of NewSchools' goals: to center DEI initiatives.

### **Strategic Needs for Enhanced Impact Assessment**

The complexity of accurately assessing and responding to this diverse student population's unique educational needs and challenges necessitates a sophisticated approach. NewSchools recognizes several critical strategic needs that must be addressed to effectively enhance its impact assessment capabilities. First, there is the challenge of measuring outcomes for undiagnosed students. These students, who may have learning differences that still need to be formally identified, often fall through the cracks of traditional data collection practices. Current methodologies must explicitly identify or track this subgroup, making it difficult to understand their specific needs and the effectiveness of interventions designed to support them. This lack of explicit identification can lead to gaps in service provision and support, ultimately hindering the ability to tailor educational programs to these students' unique challenges.

Furthermore, the varying stages of venture development—from ideation to implementation—complicate the availability and reliability of impact data. Early-stage ventures may lack the infrastructure for robust data collection and analysis, leading to inconsistent or incomplete information about their effectiveness. As ventures progress through different stages, the metrics for success may also evolve, requiring adaptable and scalable assessment tools that can capture both short-term and long-term outcomes. This variability necessitates a flexible yet rigorous framework for impact assessment that can accommodate the diverse needs and capacities of different ventures.

Additionally, the nature of educational interventions themselves presents a challenge. Many factors, including socioeconomic background, community support, and individual student

characteristics influence academic outcomes. Disentangling the specific impacts of NewSchool's initiatives from these broader influences requires sophisticated analytical techniques and comprehensive data sets. The complexity of these factors demands an approach that can integrate quantitative and qualitative data, providing a holistic view of each student's educational journey. Moreover, stakeholder engagement is critical but often challenging. Collecting meaningful feedback from students, parents, teachers, and community members requires significant effort and resources. Ensuring this feedback is systematically incorporated into impact assessments can be difficult, particularly for ventures operating at a large scale or across multiple sites. Engaging stakeholders effectively is essential for capturing educational programs' nuanced impacts and refining interventions to meet the needs of students with learning differences.

Finally, there is the issue of technological integration. Leveraging advanced data analytics, machine learning, and other technologies can enhance the precision and depth of impact assessments. However, integrating these technologies into existing systems and ensuring that staff are adequately trained to use them presents additional challenges. Ensuring data security and privacy while collecting and analyzing sensitive student information adds another layer of complexity to the process.

The strategic needs for enhanced impact assessment at NewSchools involve addressing the challenges of identifying undiagnosed students, managing the variability in venture development stages, disentangling complex educational influences, effectively engaging stakeholders, and integrating advanced technologies. By developing a sophisticated approach that tackles these issues, NewSchools can better understand and respond to the unique educational needs of students with learning differences, ultimately fulfilling its mission to transform K-12 education through innovation and equity.

## **Proposed Strategic Approach**

In response to these challenges, we propose a strategic approach to enhance NewSchools' understanding and support of students with learning differences. Grounded in the principles of two prime theories, Social Constructivism and Self-Determination Theory (SDT), this methodology provides a comprehensive framework for evaluating and addressing the educational needs of these students. Social Constructivism emphasizes the importance of social interactions and the environment in learning (Vygotsky, 1978). By integrating this theory, NewSchools can evaluate and support learning environments through a lens of collaboration, tailoring strategies to the unique needs of students with learning differences. This approach encourages the development of supportive educational communities where students can engage in meaningful interactions that enhance their learning experiences. NewSchools can support organizations in creating environments that foster collaborative learning, ensuring that these environments are inclusive and adaptive to the diverse needs of students.

Self-Determination Theory (SDT), as articulated by Deci and Ryan (2000) and further developed by Ryan and Deci (2017), focuses on nurturing autonomy, competence, and relatedness. By applying SDT principles, NewSchools can guide its partner organizations in developing programs that empower students and educators. This involves promoting practices that allow students with learning differences to take control of their learning journeys, feel competent in their abilities, and build strong, supportive relationships within their educational communities.

To implement these theories effectively, NewSchools can provide resources, training, and support to educational organizations that work directly with students. By offering guidance on best practices and innovative strategies, NewSchools can help these organizations create learning

environments that are both inclusive and effective. For example, NewSchools can look into funding professional development programs that train teachers in collaborative and student-centered teaching methods, or it could support the development of adaptive learning technologies that cater to the specific needs of students with learning differences. By doing so, NewSchools ensures that its investment strategy aligns with the evaluation standards and best practices in education and philanthropy. Furthermore, NewSchools can facilitate partnerships between schools, communities, and other stakeholders to build a support network around students. This network can include parents, special education professionals, and community organizations, all working together to create a holistic support system for students with learning differences. By leveraging its position, NewSchools can advocate for policies and practices that prioritize the needs of these students, ensuring that they receive the necessary resources and opportunities to thrive. This aligns with NewSchools' current practice of involving key stakeholders from across the United States as board members to the venture application review process. This ensures that investment decisions are aligned with ongoing needs in the educational space. Having stakeholders, such as parents, school administrators, and researchers, provide direct feedback to the venture selection process positions NewSchools to make key decisions that have the potential to impact the target population.

By grounding its efforts in Social Constructivism and SDT, NewSchools can enhance its impact, ensuring that students with learning differences receive the tailored support they need to succeed while measuring its impact inclusively and equitably. Through this methodology, NewSchools aims to foster environments where all students can engage in meaningful, collaborative learning experiences and develop the skills and confidence needed for lifelong success.

## **Forward Vision**

The necessity of a sophisticated approach to impact assessment at NewSchools is driven by the organization's foundational commitment to transforming K-12 education through innovation and equity. Their dedicated focus on students with learning differences underscores the purpose of NewSchools: to ensure every child receives the educational opportunities and support they need to thrive, regardless of their challenges.

The proposed strategic approach, developed to provide NewSchools with a detailed methodology for an extensive impact evaluation, is not merely a technical improvement but a reaffirmation of its core mission. By enhancing its ability to share progress and identify challenges through a more nuanced understanding of the impact on students with learning differences, NewSchools will be able to reaffirm its commitment to driving systemic change. This will involve refining assessment methods to be more inclusive and equitable and aligning them with its vision of incorporating the DEI principles at the heart of everything NewSchools does.

A sophisticated impact assessment approach means going beyond traditional metrics to include qualitative data that captures students' lived experiences with learning differences. For instance, NewSchools could implement longitudinal studies that follow students over several years, tracking academic progress and social and emotional development. These studies could include interviews with students, parents, and teachers to gain deeper insights into how NewSchools' interventions affect their daily lives and long-term prospects.

Furthermore, NewSchools' commitment to DEI principles can be operationalized through the strategic use of data analytics to identify and address gaps in service provision. By disaggregating data by various demographic factors, NewSchools can pinpoint specific areas

where students with learning differences may be underserved and develop targeted interventions to address these disparities. This approach ensures that the voices and needs of the most marginalized students are heard and addressed, leading to more equitable educational outcomes.

By aligning its strategic goals with its foundational purpose, NewSchools is poised to strengthen its impact further and continue its crucial work, ensuring that its investments lead to real and lasting change in the K-12 education system. This alignment is about improving processes and embedding NewSchools' values into every aspect of its operations, from program design to evaluation and beyond.

Ultimately, this strategic approach is a testament to why NewSchools exists: to catalyze significant educational transformations that expand opportunities for all students, particularly those with learning differences. By fostering a culture of continuous improvement and inclusivity, NewSchools can ensure that every child, regardless of their background or abilities, has the chance to succeed and reach their full potential. This forward vision will enable NewSchools to maintain its educational innovation and equity leadership, driving systemic change that benefits students, educators, and communities alike.

### **Part III: Review of Literature**

Effective communication of diverse educational impacts requires adaptable storytelling strategies. For NewSchools, this involves narrating the successes of quantifiable tech-based solutions and more nuanced initiatives like caregiver workshops. The diversity in venture types presents a significant challenge in maintaining a coherent and impactful narrative. For instance, the impact of a cutting-edge EdTech solution that improves learning outcomes through interactive software can be quantified through user engagement metrics and learning assessments. In contrast, the long-term effects of caregiver workshops, which aim to enhance

parental engagement in education, often manifest as qualitative improvements in family dynamics and educational support at home, making them harder to measure and communicate. These examples underscore the need for a comprehensive and strategic approach to assess, narrate, and share the multifaceted impacts of NewSchools' diverse ventures. NewSchools must develop a storytelling framework capable of encompassing and conveying the varied successes and learnings from its wide array of supported initiatives, ensuring the richness and diversity of its impacts are effectively communicated to stakeholders and the broader educational community.

To enhance its impact, NewSchools seeks to improve the precision and accountability of its ventures by adopting operational and statistical methodologies. Insights from Kues (2018) provide valuable guidance on refining operational definitions and implementing rigorous statistical practices, which are crucial for making data-driven decisions and ensuring the effectiveness of NewSchools' initiatives. Efficient resource management and innovative financing are also essential for NewSchools' sustainability. The Public-Private Partnership (PPP) models highlighted by Khallaf et al. (2022) offer robust frameworks that NewSchools can adapt to optimize resource allocation and leverage private-sector financing. This approach enables NewSchools to manage resources more effectively and support broader educational initiatives.

Understanding and communicating the social return of NewSchools' projects is vital for stakeholder engagement and transparency. Moody et al. (2015) emphasize capturing the qualitative journey of ventures and enhancing stakeholder engagement through the Social Return on Investment (SROI) framework. This involves documenting and understanding the projects' experiences, stories, and broader impacts beyond mere financial metrics. This approach quantifies the financial impact of projects and articulates the wider social benefits, such as

improved educational outcomes and community well-being. By effectively showcasing these qualitative aspects, NewSchools can provide a comprehensive narrative that resonates with stakeholders, thereby fostering greater trust and continued support for its initiatives.

Creating tailored evaluation methodologies for enhanced accountability is crucial for understanding the impact of diverse ventures. Schell et al. (2013) provide a sustainability framework that emphasizes creating evaluation methodologies tailored to each project's unique goals and contexts. This framework offers NewSchools' strategies to develop customized evaluation methodologies that ensure long-term viability and practical impact assessment. These frameworks help NewSchools measure and communicate the specific impacts of each project, thereby improving strategic decision-making and overall program effectiveness. Additionally, effective partnership management is key to NewSchools' mission. The ABIOPT (Activity-Based Integrated Organizational Partnership Typology) framework from Clevenger & MacGregor (2021) guides NewSchools in categorizing and managing various educational partnerships. This approach aligns with NewSchools' commitment to equity, innovation, and sustainability, ensuring that partnerships are strategically leveraged for maximum impact.

By synthesizing these critical insights, NewSchools can better navigate the complexities of the educational landscape with a more nuanced and data-driven approach. Adapting research-based strategies from these studies can empower NewSchools to enhance its operational effectiveness and strengthen its role as a catalyst for transformative educational initiatives. Incorporating these methodologies can enrich NewSchools' ability to evaluate and communicate the impact of its investments, ensuring a holistic approach to its mission. This proactive and research-informed strategy lays a solid foundation for NewSchools to foster impactful collaborations, drive sustainable educational improvements, and contribute to a more equitable



and innovative education system. By continually adapting these research-based strategies, NewSchools underscores its dedication to advancing educational transformation and societal betterment, reinforcing its commitment to creating lasting and positive educational change.

### **Critical Insights & Connected Themes**

The literature reviewed is instrumental in refining and guiding the operational and strategic methodologies at NewSchools. By integrating insights from diverse studies, NewSchools can develop a robust framework to enhance its operations, ensuring that strategies are impactful and sustainably aligned with its core mission of transforming education for all students, particularly those with learning differences. The research and scholarly articles have been instrumental in evaluating NewSchools' approaches, offering a comprehensive perspective that enriches the organization's capabilities in several critical areas. Key themes from the literature are:

- 1) Enhancing operational precision
- 2) Leveraging Public-Private Partnerships (PPPs)
- 3) Emphasizing SROI
- 4) Strategic partnership alignment
- 5) Tailored evaluation methodologies and benchmarking practices

These themes and collective insights ensure that NewSchools' strategies remain at the forefront of educational innovation and effectiveness. They also increase the likelihood of NewSchools being better equipped to address the complex needs of its diverse students, ensuring that every strategy and intervention is both evidence-based and finely tuned to foster educational equity and excellence.

## **Theme 1: Enhancing Operational Precision**

Operational precision is critical for NewSchools as it seeks to accurately measure and communicate the impacts of its educational initiatives, especially those targeted at students with learning differences. Achieving this precision involves a multidimensional approach that begins with establishing clear operational definitions. This foundational step ensures that all interventions are tailored effectively, responsive to the nuances of diverse learning environments, and aligned with NewSchools' strategic goals.

### ***Integrating Rigorous Statistical Methods***

A key element in enhancing operational precision is incorporating rigorous statistical methods in the evaluation process. This involves clearly defining study variables and selecting adequate sample sizes, practices which Kues (2018) underscores as essential for improving the reliability of impact assessments. These practices not only enable NewSchools to delineate the specific effects of each educational venture, whether it involves cutting-edge EdTech tools or caregiver-focused workshops, but also ensure that resource allocation is both strategic and impactful, minimizing the risk associated with investing in less effective initiatives.

For example, in evaluating the impact of a new EdTech tool designed to enhance math proficiency among middle school students with learning differences, rigorous statistical methods would involve defining variables such as pre-and post-test scores, frequency of tool usage, and specific learning challenges. By selecting an adequate sample size that represents the diverse needs of these students, NewSchools can ensure the results are statistically significant and generalizable. Suppose the analysis reveals that students with learning differences using the EdTech tool show a 20% improvement in math scores compared to a control group. This clear delineation of impact allows NewSchools to justify further investment in the tool and confidently

scale the initiative.

Moreover, by applying these rigorous methods, NewSchools can identify which program components are most effective for students with learning differences. For instance, the statistical analysis might reveal that students benefit most from interactive, multisensory problem-solving features rather than traditional video lectures. This insight allows NewSchools to refine the program, focusing resources on the most impactful elements and maximizing educational outcomes for these students. By integrating such rigorous statistical methods, NewSchools ensures that its impact assessments are reliable and actionable, guiding strategic decisions that enhance its educational initiatives' overall effectiveness and efficiency for students with learning differences.

### ***Addressing Educational Disparities Through Data Analysis***

Operational precision also directly supports NewSchools' commitment to addressing educational disparities, an essential aspect of its mission to foster DEI. Kues (2018) emphasizes the importance of comprehensive and consistent reporting of statistical results, which helps the organization track progress effectively and identify areas where educational interventions are most needed. This rigorous approach to data analysis ensures that NewSchools can address these disparities more effectively, contributing to more equitable educational outcomes. For instance, by analyzing data on student performance across different demographics, NewSchools can pinpoint specific inequality in educational attainment among various groups, such as students from low-income backgrounds or those with learning differences. Suppose data analysis reveals that students with learning differences in underfunded schools perform significantly lower in standardized tests than their peers. This insight enables NewSchools to allocate resources strategically, such as implementing specialized support programs or introducing adaptive

learning technologies tailored to these students' needs.

Continuous data analysis allows NewSchools to monitor the impact of these interventions over time. For example, if a targeted reading intervention program is introduced in schools with high numbers of students with learning differences, regular data collection and analysis can track improvements in reading proficiency, attendance rates, and overall student engagement. This ongoing assessment ensures that the interventions are effective and allows adjustments to be made to maximize their impact. By leveraging detailed data analysis, NewSchools identifies and addresses educational disparities and creates a feedback loop that continually informs and improves its strategies. This commitment to data-driven decision-making enhances NewSchools' ability to foster an inclusive academic environment where all students have the opportunity to succeed, regardless of their background or learning challenges.

### ***Communicating Impact Effectively***

Operational precision significantly enhances NewSchools' ability to communicate its ventures' impacts effectively. Kues (2018) discusses how clear definitions and rigorous data verification procedures improve the organization's storytelling capabilities, enabling it to convey the successes and challenges of its diverse initiatives to a broader audience. This precision in communication engages stakeholders and builds trust and support for NewSchools' mission. For example, by meticulously defining success metrics for an educational program aimed at improving STEM skills among underrepresented minorities, NewSchools can collect and verify data that highlights both quantitative and qualitative outcomes. Suppose a program increases STEM proficiency test scores by 25% and results in higher student engagement levels, especially for those with learning differences and interest in STEM careers. By clearly communicating these outcomes, supported by robust data, NewSchools can craft compelling narratives that

showcase the transformative impact of its initiatives.

Moreover, using data visualization tools, NewSchools can create interactive reports and dashboards that allow stakeholders to explore the data themselves, gaining a deeper understanding of the program's impacts. For instance, an interactive dashboard could show year-to-year improvements in student performance alongside testimonials from participants who have experienced significant personal growth. This multi-faceted approach to communication ensures that stakeholders see a holistic picture of the program's effectiveness.

Additionally, by transparently sharing the successes and the challenges faced, NewSchools fosters a culture of openness and continuous improvement. For example, suppose a particular initiative did not achieve its intended outcomes. In that case, NewSchools can use precise data to analyze what went wrong and communicate these findings to stakeholders, outlining steps for future improvements. This transparency enhances credibility and demonstrates NewSchools' commitment to learning and adapting in pursuit of its mission. By leveraging operational precision in its communications, as highlighted by Kues (2018), NewSchools can more effectively engage its audience, building a solid foundation of trust and support that is essential for sustaining and expanding its educational initiatives.

## **Theme 2: Leveraging Public-Private Partnerships (PPPs)**

NewSchools faces the primary challenge of managing and communicating the diverse impacts of its educational ventures, which range from innovative EdTech solutions to caregiver-focused workshops. This task requires a robust understanding of these impacts and a strategic approach to funding and resource allocation. In addressing these challenges, the Public-Private Partnerships (PPPs) model, as demonstrated in higher education infrastructure projects in Texas and Virginia, provides a viable framework that NewSchools can adapt.

According to Khallaf et al. (2022), PPPs in these regions have shown a noteworthy success rate, primarily in developing residential and mixed-use facilities, which are notable for their adherence to budgets and timelines. This model, remarkable for its adherence to budget and timelines, provides NewSchools with critical lessons on forming partnerships that successfully manage private financing, mitigate risks, and tackle challenges in construction and finance.

### ***Optimizing Resource Management***

The success of PPPs in maintaining budget and schedule integrity offers critical lessons for NewSchools in forming partnerships that successfully manage private financing, mitigate risks, and tackle challenges in construction and finance. The PPP model's proven track record provides NewSchools with a clear example of how efficient and effective resource management can be achieved. This model is highly relevant as NewSchools seeks to optimize its investment strategies and ensure accountability in its ventures (Khallaf et al., 2022). For instance, consider a hypothetical scenario where NewSchools invests in a private technology firm to develop and implement a new digital learning platform to enhance educational outcomes for students in underserved communities. By adopting the PPP model, NewSchools can leverage the private firm's expertise and financial resources while ensuring shared risk management and accountability.

In this scenario, the private firm handles the development and maintenance of the platform, while NewSchools focuses on integrating the tool into schools and training educators. A clear budget and schedule are established, with milestones set for each project phase. Regular performance reviews and transparent reporting mechanisms ensure that both parties meet their commitments. Through this partnership, NewSchools can mitigate financial risks associated with the development and deployment of the platform, as the private firm shares in both the

investment and the potential economic returns. Additionally, having a structured framework for accountability can promptly address any issues or delays, ensuring the project stays on track.

This example demonstrates how the PPP model can optimize resource management by combining the strengths of both public and private sectors, ultimately leading to more effective and efficient use of resources. By applying these principles, NewSchools can enhance its investment strategies, ensuring that its ventures are impactful and sustainable.

### ***Advantages of PPPs***

The advantages of PPPs, such as leveraging private sector financing and risk transference, align with NewSchools' goal of developing sustainable and impactful partnerships. This framework allows NewSchools to diversify its funding sources, which is crucial when supporting various educational initiatives. PPPs provide NewSchools with flexible and innovative approaches to funding and supporting its diverse educational ventures. For example, consider a hypothetical project where NewSchools partners with a private technology company to develop a new digital learning platform for underserved schools. By leveraging the private sector's financial resources and technological expertise, NewSchools can implement this initiative without bearing the full financial risk. The private partner might provide the upfront investment needed to develop the platform, while NewSchools focuses on integrating it into the educational system, training teachers, and monitoring its impact. This partnership not only spreads the financial risk but also allows both parties to bring their strengths—NewSchools' deep understanding of educational needs and the private sector's innovation capabilities. The success of this venture could then be evaluated through both quantitative metrics, such as student engagement and academic performance, and qualitative feedback from teachers and students.

By leveraging the insights from Khallaf et al. (2022), NewSchools can enhance the

efficiency and sustainability of its ventures. This strategic integration of PPPs provides NewSchools with a robust framework for advancing its mission in a sustainable and impactful manner. It ensures that every partnership and project is financially viable and strategically aligned with its broader mission goals. For example, if NewSchools were to replicate the successful aspects of PPPs identified by Khallaf et al. (2022), such as those in technology infrastructure projects, it could ensure that educational technology initiatives are well-supported and sustainable. This would involve NewSchools collaborating with private tech firms to deploy advanced learning tools in schools, backed by reliable funding and shared risk management, ultimately leading to improved educational outcomes and more robust, more resilient educational infrastructures.

### **Theme 3: Emphasizing SROI**

#### ***NewSchools Strategic Communication Needs***

At NewSchools, effectively communicating the impact of educational initiatives is a key strategic priority, especially for programs like caregiver workshops where outcomes are profound yet not easily quantifiable. The organization aims to develop a comprehensive storytelling approach that captures these initiatives' quantitative and qualitative aspects, ensuring that all stakeholders gain a deep and meaningful understanding of the impacts.

#### ***Integrating SROI for Comprehensive Impact Assessment***

NewSchools is dedicated to communicating the nuanced and transformative impacts of its educational programs, particularly those that are qualitative and not easily quantifiable. The challenge of conveying these impacts comprehensively requires an approach that goes beyond traditional quantitative methods. In this context, the SROI methodology, as Moody et al. (2015) discussed, becomes particularly relevant. SROI principles emphasize the importance of



stakeholder engagement, understanding and valuing outcomes, and establishing clear impacts. By integrating these principles, NewSchools ensures that its communications accurately reflect the full spectrum of outcomes, facilitating a more profound understanding among stakeholders of the broad impacts of its initiatives. This methodology aligns with NewSchools aim to enhance transparency and stakeholder engagement, thus supporting its strategic communication goals. For instance, consider a hypothetical NewSchools-funded program to improve literacy rates among elementary school students in low-income areas. Traditional quantitative metrics might measure success by examining standardized test scores' improvements. However, the SROI methodology allows for a more comprehensive assessment by capturing qualitative outcomes.

Through the SROI process, NewSchools would engage stakeholders, including students, teachers, and parents, to gather stories and feedback. This could involve conducting interviews and focus groups to understand the broader impacts of the literacy program. For example, teachers might report that students who previously struggled with reading are now more confident and enthusiastic about learning. Parents might share that their children are more engaged with their homework and show a newfound interest in reading at home. Additionally, the program might foster a stronger sense of community, with increased parental involvement in school activities and more collaboration between parents and teachers.

SROI principles guide this process by ensuring that the changes resulting from the program are identified and valued in monetary terms to reflect their actual impact. This includes direct educational outcomes and indirect benefits such as improved self-esteem and community cohesion. By integrating these qualitative insights with quantitative data, SROI allows NewSchools to present a holistic view of the program's impact. This comprehensive narrative can be shared with stakeholders, demonstrating not only the measurable improvements in

literacy but also the enhanced self-esteem, increased parental involvement, and stronger community ties resulting from the program. This example highlights how adopting SROI enables NewSchools to communicate the full depth of its educational impacts effectively. By capturing both quantitative and qualitative outcomes, NewSchools can provide a richer, more nuanced understanding of its initiatives' success. This approach not only enhances transparency and stakeholder engagement but also supports NewSchools' strategic communication goals by showcasing the multifaceted value of its educational programs.

### ***Navigating Complexities in Multi-Partner Settings***

NewSchools operates diverse projects, from high-tech educational platforms to community-based educational workshops, often involving multiple partners. These multi-partner settings introduce complexities that challenge accurately capturing and communicating each initiative's unique impacts. To manage these complexities effectively, the adoption of SROI principles is crucial. As Moody et al. (2015) highlight, SROI provides a framework that can accommodate the varied nature of these projects. SROI principles emphasize the importance of stakeholder engagement, understanding and valuing outcomes, and establishing clear impacts. By integrating SROI, NewSchools ensures that the effects of each project are comprehensively documented and communicated, reflecting the actual value of the initiatives irrespective of the number of stakeholders or the intricacies involved. For example, consider a hypothetical initiative where NewSchools collaborates with a private technology company, a local school district, and a nonprofit organization to implement a comprehensive STEM education program in underserved schools. This program includes deploying advanced learning technologies, providing teacher training, and organizing community engagement activities to foster a supportive learning environment.

In such a multi-partner setting, the complexities are manifold. Each partner brings different resources, objectives, and expectations to the table. The technology company focuses on the efficacy of its tools, the school district on student performance and integration into the curriculum, and the nonprofit on community involvement and support. Capturing the diverse impacts of this collaborative effort requires a robust and adaptable framework.

By applying SROI principles, NewSchools can comprehensively evaluate and document each partner's unique contributions and outcomes. SROI principles guide the process by ensuring stakeholder engagement at every step, identifying what changes occur due to the program, and valuing these changes in monetary terms to reflect their actual impact. Quantitative data might include improvements in student test scores and increased usage of the technology platform. Simultaneously, qualitative data can be gathered through interviews and surveys with teachers, students, and parents to capture stories of enhanced engagement, improved teaching practices, and stronger community ties. For instance, teachers might report that the training sessions have significantly improved their confidence and ability to integrate STEM activities into their lessons, leading to higher student engagement and interest in STEM subjects. Parents might share stories of their children's newfound enthusiasm for science and technology, participating in home-based experiments and projects inspired by the program.

SROI provides a holistic view of the program's impact by integrating these diverse data points. This approach not only aids in maintaining clarity and accuracy in communications but also strengthens stakeholder engagement by transparently showcasing the outcomes of these collaborative efforts. Stakeholders, including funders, partners, and the community, can see a clear and comprehensive picture of the program's value, fostering trust and support for future initiatives.

### ***Implementing SROI Best Practices***

NewSchools aims to develop and refine its impact assessment strategies to better understand and communicate its educational initiatives' diverse impacts. Implementing best practices from SROI, as suggested by Moody et al. (2015), provides NewSchools with a robust framework for this purpose. SROI best practices emphasize stakeholder engagement, comprehensive outcome measurement, and transparent reporting, enabling NewSchools to strategically assess, narratively capture, and share the multifaceted impacts of its ventures. One critical aspect of SROI is the engagement of stakeholders at every stage of the assessment process. This involves identifying key stakeholders—such as students, parents, teachers, and community members—and actively involving them in defining outcomes and providing feedback. By incorporating their perspectives, NewSchools can ensure that its assessments reflect the true value of its initiatives to those directly impacted.

Another vital practice is the comprehensive measurement of outcomes. SROI encourages using quantitative and qualitative data to capture the full spectrum of an initiative's impact. This means tracking metrics like test scores and attendance rates and gathering stories and qualitative feedback that illustrate the broader social and emotional benefits of educational programs. For instance, a program designed to improve STEM education might show quantitative improvements in test scores, while qualitative feedback reveals increased student confidence and interest in science.

Transparency in reporting is also a cornerstone of SROI. By clearly documenting and communicating the processes, findings, and challenges of impact assessments, NewSchools can build trust and accountability with its stakeholders. Detailed reports and narratives highlighting successes and improvement areas demonstrate NewSchools' commitment to continuous learning

and adaptation. For example, in a hypothetical NewSchools initiative to integrate technology in classrooms, SROI best practices would involve engaging teachers and students from the outset to identify desired outcomes and gather baseline data. Throughout the project, ongoing feedback would be collected through surveys and focus groups to track progress and identify emerging impacts. Quantitative data might show improvements in digital literacy and student engagement. At the same time, qualitative feedback could capture stories of increased teacher confidence in using technology and students' enthusiasm for new learning methods.

By grounding its assessment strategies in SROI best practices, NewSchools can more effectively articulate the richness and diversity of its impacts. This approach enhances communication with stakeholders and strengthens connections with the broader educational community. Through comprehensive and transparent reporting, NewSchools can showcase the depth and breadth of its transformative educational efforts, illustrating how each initiative contributes to its overarching mission of fostering innovation and equity in education. Implementing SROI best practices provides NewSchools with a powerful toolkit to enhance its impact assessment strategies. By engaging stakeholders, comprehensively measuring outcomes, and ensuring transparency, NewSchools can more effectively communicate its educational initiatives' significant and diverse impacts, thereby reinforcing its role as a leader in educational transformation.

#### **Theme 4: Strategic Partnership Alignment**

##### ***Utilizing the ABIOPT Framework***

NewSchools is dedicated to strategically aligning its partnerships to enhance the effectiveness of its investments in educational ventures. The ABIOPT framework—Activity-Based Integrated Organizational Partnership Typology—introduced by

Clevenger & MacGregor (2021), categorizes partnerships into four types: philanthropic, transactional, symbiotic, and synergistic. By utilizing this nuanced categorization, NewSchools can tailor its approach based on each partnership's nature and strategic objectives, ensuring alignment with its core mission of advancing education. The ABIOPT framework allows NewSchools to assess the nature and goals of each partnership, ensuring that they align with NewSchools' strategic objectives. For example, philanthropic partnerships might focus on funding grassroots educational programs, while transactional partnerships could involve agreements with service providers to deliver specific educational resources or services.

Building relationships that align with the identified partnership type is crucial. In the case of symbiotic partnerships, NewSchools might collaborate with EdTech startups to co-develop innovative educational tools, leveraging the strengths of both organizations to enhance learning outcomes. Implementing initiatives effectively by coordinating efforts and resources is another vital aspect. For instance, in a symbiotic relationship, NewSchools and an EdTech startup could collaborate to integrate new technologies into classrooms, with each partner playing a crucial role in the implementation process.

Optimization of the partnership involves continually monitoring and evaluating its effectiveness. This could involve regular check-ins and data analysis to ensure the partnership meets its goals and makes the desired impact. Effective partnering requires maintaining open communication and supporting mutual goals. This ongoing collaboration ensures both parties remain committed to the partnership's success. In synergistic partnerships, NewSchools might work with research institutions to co-develop and test new educational methodologies, ensuring that the latest research informs practice.

Transforming educational practices and outcomes through sustained and impactful

collaborations is the ultimate goal. Successful partnerships can lead to systemic educational changes, such as the widespread adoption of practical new teaching tools or methods developed through NewSchools' partnerships. For example, NewSchools can use philanthropic funding to support grassroots educational programs that address specific community needs, fostering local innovation and engagement. Simultaneously, NewSchools can engage symbiotic relationships with EdTech startups, co-developing innovative tools and solutions that enhance educational outcomes. NewSchools might work with service providers in transactional partnerships to deliver specific educational resources or programs. In contrast, synergistic partnerships with research institutions or policy organizations can help scale successful initiatives and drive systemic change.

By strategically utilizing the ABIOPT framework, NewSchools ensures that each partnership aligns with and supports its core mission of advancing education. This structured approach allows NewSchools to maximize the impact of its investments, foster meaningful collaborations, and drive significant improvements in the educational sector.

### ***Effective Stakeholder Management***

Effective stakeholder management is crucial for NewSchools, as it navigates a complex network of educators, investors, and entrepreneurs. The ABIOPT framework emphasizes the importance of understanding and managing stakeholder expectations, essential for aligning the fund's investments with shared values of equity and innovation in education. By implementing practices suggested by the ABIOPT framework, such as assessing stakeholder needs, building solid relationships, coordinating efforts during implementation, continuously optimizing partnerships, maintaining open communication, and transforming educational practices, NewSchools can enhance its ability to ensure that all parties are working towards common goals,

thereby increasing the impact and sustainability of its educational initiatives.

For instance, NewSchools is launching a new program to integrate advanced digital learning tools in underserved schools. This program involves multiple stakeholders, including a technology company providing the digital tools, local educators who will implement these tools, and investors funding the initiative. Using the ABIOPT framework, NewSchools begins by assessing the needs and expectations of each stakeholder. This includes conducting initial meetings and surveys to gather insights into each party's goals, concerns, and desired outcomes. By understanding these diverse expectations, NewSchools can tailor its approach to address each stakeholder's unique problems and objectives. Next, NewSchools builds strong relationships with these stakeholders by establishing clear communication channels and setting transparent goals. Practices include regular meetings, detailed project timelines, and clearly defined roles and responsibilities. For example, NewSchools may set up bi-weekly progress updates and a shared online platform for real-time communication and resource sharing. During the implementation phase, NewSchools coordinates efforts to ensure the smooth integration of digital tools into the school curriculum. This involves providing comprehensive training sessions for educators, piloting the tools in a few classrooms before full-scale deployment, and creating support networks for teachers to share experiences and solutions.

Optimization of the partnership is achieved by continuously monitoring the project's outcomes and making data-driven adjustments. NewSchools practices include using performance metrics, such as student engagement levels and test scores, as well as qualitative feedback from teachers and students. Regular data reviews and feedback sessions help refine the program and ensure it meets its goals. Effective partnering means maintaining open communication and fostering a collaborative environment. NewSchools ensures that all stakeholders are regularly



updated on the project's progress and any changes being made. Practices include monthly stakeholder meetings, detailed progress reports, and an open-door policy for addressing concerns and suggestions. Finally, the goal is to transform educational practices and outcomes through the sustained impact of the partnership. Practices involve scaling successful pilot programs, sharing best practices and lessons learned with a broader audience, and advocating for policy changes based on the program's success. NewSchools may host conferences or webinars to disseminate the findings and encourage the adoption of similar initiatives in other schools and districts.

By strategically utilizing the ABIOPT framework and its suggested practices, as highlighted by Clevenger & MacGregor (2021), NewSchools can manage stakeholder relationships effectively, ensuring that each partnership aligns with and supports its core mission of advancing education. This structured approach maximizes the impact of its investments, fosters meaningful collaborations, and drives significant improvements in the educational sector.

### ***Optimizing Multi-Stakeholder Partnerships***

NewSchools aims to optimize resource allocation and enhance accountability by leveraging multi-stakeholder partnerships. Operating at the nexus of diverse educational ventures, NewSchools recognizes the critical importance of understanding the impact of its funding to make informed decisions and effectively address educational disparities. Research by Clarke & Macdonald (2019) underscores the benefits of multi-stakeholder partnerships, including access to diverse physical, financial, and human resources. These collaborative efforts lead to better decision-making, enhanced efficiencies, and significant learning opportunities.

By adopting strategies proven effective in these partnerships, NewSchools can leverage shared knowledge and resources to improve its educational initiatives. Multi-stakeholder partnerships allow NewSchools to draw from the strengths of various sectors, including public

institutions, private companies, non-profits, and community organizations. This diverse collaboration fosters innovation and enables comprehensive solutions that a single entity might not achieve alone. For example, consider a partnership where NewSchools collaborates with a technology company, a local school district, and a community-based organization to develop and implement a digital learning platform in under-resourced schools. The technology company provides the necessary digital tools and technical support, the school district ensures the platform's integration into the curriculum, and the community organization engages parents and students to promote adoption and provide feedback. This multi-faceted approach ensures that the initiative is well-rounded and addresses various aspects of the educational experience.

Clarke & Macdonald (2019) highlight that such partnerships bring together different perspectives and expertise, leading to more holistic and practical problem-solving. In the case of the digital learning platform, the technology company's expertise in software development is complemented by the school district's knowledge of educational standards and the community organization's understanding of local needs and dynamics. This synergy can result in a more robust and user-friendly platform that meets the specific needs of the students and teachers. Moreover, multi-stakeholder partnerships enhance accountability through shared goals and collective responsibility. By establishing clear objectives and regular performance reviews, NewSchools and its partners can ensure that the initiative stays on track and achieves its intended outcomes. This collaborative accountability framework encourages transparency and continuous improvement, as partners are motivated to share best practices and learn from each other's experiences.

These partnerships also create significant learning opportunities for all involved parties. NewSchools can gain insights into the latest technological advancements and educational

methodologies while its partners can better understand the academic challenges and opportunities within the communities they serve. This mutual learning enhances the capacity of all stakeholders to innovate and adapt to changing educational landscapes. By optimizing multi-stakeholder partnerships, NewSchools can address sector-wide challenges more effectively and improve its programs' overall impact and sustainability. This collaborative approach maximizes resource utilization and fosters a culture of shared responsibility and continuous learning. By leveraging the diverse strengths of its partners, NewSchools can drive meaningful improvements in education, ensuring that its initiatives are inclusive, effective, and sustainable.

### ***Sustainability and Long-Term Impact***

The triple bottom line of sustainability—economic, social, and environmental—outlined in the ABIOPT framework aligns seamlessly with NewSchools' focus on creating long-term impacts in the education sector. NewSchools can contribute to more comprehensive and enduring educational improvements by integrating these sustainability principles into its partnership strategies. This holistic approach ensures that NewSchools' initiatives meet current educational needs and are viable and beneficial in the long run. For economic sustainability, it is crucial to ensure the financial viability of academic initiatives for long-term success. NewSchools can achieve economic sustainability by diversifying funding sources through strategic partnerships with private sector investors, philanthropic organizations, and government grants. For instance, collaborating with a technology company could involve co-funding the development of a new digital learning platform with a revenue-sharing model that reinvests profits into further educational projects. By establishing robust financial frameworks and exploring innovative funding mechanisms, NewSchools can sustain its initiatives over time and reduce dependency on any single funding source.

Focusing on the well-being and equitable treatment of all stakeholders is crucial for social sustainability. NewSchools' commitment to equity in education ensures that initiatives are designed to be inclusive and accessible to all students, particularly those from underserved communities. This involves engaging local communities, educators, parents, and students in the planning and implementation phases to ensure their needs and perspectives are considered. For example, NewSchools might implement community-driven educational programs that empower local stakeholders to take ownership of the projects, fostering a sense of community and long-term commitment. Regular feedback loops and participatory evaluations can help adjust programs to meet social needs better, ensuring they remain relevant and practical.

Incorporating environmental considerations into educational initiatives can enhance their overall sustainability. NewSchools can promote ecological awareness and stewardship through its projects, encouraging schools to adopt green practices and integrate environmental education into the curriculum. For instance, NewSchools could support initiatives that involve creating school gardens, implementing recycling programs, or using renewable energy sources in school facilities. These efforts contribute to a healthier planet and teach students valuable lessons about sustainability and environmental responsibility, preparing them to be conscientious citizens. From supporting students with a learning differences lens, these environmental projects could provide valuable career and work-ready experiences that would allow students to continue to develop executive and organizational skills and other opportunities that will enable students to refine post-secondary goals.

By aligning with the triple bottom line of sustainability, NewSchools can create educational initiatives that are resilient and adaptable to changing circumstances. This comprehensive approach ensures that projects are economically viable, socially inclusive, and

environmentally responsible. Furthermore, NewSchools can leverage the ABIOPT framework to assess and improve its initiatives' sustainability continuously. For example, regular sustainability audits can be conducted to evaluate ongoing projects' economic, social, and environmental impacts. Insights from these audits can inform future project planning and partnership strategies, ensuring sustainability remains at the forefront of NewSchools mission.

Integrating economic, social, and environmental sustainability principles into its partnership strategies allows NewSchools to create long-term, impactful educational improvements. This approach ensures that NewSchools' initiatives address immediate educational needs and are built to last, providing enduring benefits to students, educators, and communities. By committing to the triple bottom line, NewSchools can foster a more sustainable and equitable educational landscape for future generations.

### ***Empirical Research and Framework Implementation***

The ABIOPT framework emphasizes the importance of empirical research in analyzing the effectiveness of partnerships. This recommendation is particularly pertinent to NewSchools as it seeks to measure and enhance the impact of its collaborations. Conducting empirical research allows NewSchools to gain critical insights into the outcomes of its partnerships, informing strategic decisions and necessary adjustments to maximize effectiveness. Empirical research involves systematically collecting and analyzing data to evaluate the success and impact of partnerships. For NewSchools, this means implementing robust research methodologies to gather quantitative and qualitative data on various aspects of its collaborations. This data can include metrics on student performance, teacher satisfaction, resource allocation, and the long-term sustainability of educational initiatives. By leveraging empirical research, NewSchools can develop a comprehensive understanding of how its partnerships perform and identify areas

for improvement. For instance, NewSchools might conduct longitudinal studies to track students' progress who benefit from a new digital learning platform co-developed with an EdTech partner. These studies can measure academic outcomes over several years, providing insights into the long-term impact of technology on student learning and engagement. Additionally, qualitative feedback from teachers and students can offer valuable perspectives on the usability and effectiveness of the platform in diverse classroom settings.

Incorporating the ABIOPT framework's methodologies for managing partnerships helps NewSchools address several challenges associated with corporate involvement in education. One major challenge is maintaining academic integrity while fostering innovation. By grounding its strategies in empirical research, NewSchools can ensure that innovative solutions do not compromise educational standards. For example, regular assessments and peer reviews can be implemented to ensure that new educational tools and programs meet rigorous academic criteria. Another challenge is managing commercialization concerns, which can arise when private sector partners are involved. Empirical research can help NewSchools navigate these concerns by providing transparency and accountability. For example, research findings can be shared with stakeholders to demonstrate how partnerships contribute to educational outcomes rather than purely commercial interests. This transparency helps build trust among educators, parents, and the broader community.

Furthermore, empirical research can inform the development of best practices for partnership management. By analyzing successful collaborations, NewSchools can identify key factors that contribute to their effectiveness and apply these insights to future partnerships. This iterative research, evaluation, and adjustment process ensures that NewSchools' strategies remain dynamic and responsive to changing educational needs. For instance, if empirical

research reveals that partnerships involving regular, structured teacher training sessions are more successful, NewSchools can prioritize such training in future collaborations. Similarly, if data shows that community involvement significantly enhances the impact of educational initiatives, NewSchools can incorporate strategies to engage local communities more effectively.

By integrating the ABIOPT framework's emphasis on empirical research, NewSchools can enhance its ability to create impactful and sustainable educational partnerships. This approach helps NewSchools measure the success of its collaborations and provides a solid foundation for continuous improvement. By systematically evaluating its partnerships, NewSchools can ensure that its initiatives achieve their intended outcomes and make a meaningful difference in the education sector.

#### **Theme 5: Tailored evaluation methodologies and benchmarking practices**

##### ***Tailored Evaluation Methodologies for Enhanced Accountability***

NewSchools aims to enhance its ability to understand and communicate the impact of its diverse educational ventures, which range from innovative EdTech solutions to caregiver-focused workshops. To achieve this, it is essential to employ evaluation methodologies specifically tailored to each project's unique goals and contexts. While Schell et al. (2013) emphasize the importance of sustainability in public health programs through comprehensive frameworks, similar principles can be adapted for the educational initiatives of NewSchools. Schell et al. (2013) outline several key domains necessary for sustainability: environmental support, funding stability, partnerships, organizational capacity, program evaluation, program adaptation, communications, and strategic planning. By incorporating these elements, NewSchools can develop robust evaluation frameworks that measure immediate outcomes and ensure long-term sustainability and impact. For example, in evaluating an EdTech initiative

designed to improve STEM education among high school students with learning differences, NewSchools would begin by defining specific objectives such as increasing student proficiency in STEM subjects, enhancing engagement with STEM activities, and improving teacher confidence in using technology. The mixed-method approach would involve collecting quantitative data, such as test scores and engagement metrics, alongside qualitative data from student and teacher interviews to understand the broader impacts on the learning environment.

This methodology's flexibility allows NewSchools to tailor the evaluation framework to the unique aspects of each project. For a caregiver-focused workshop to improve parental involvement in early childhood education, the objectives include increasing parent participation in educational activities, enhancing parent-child interactions related to learning, and improving children's readiness for school. Quantitative measures consist of attendance records and pre- and post-workshop surveys. At the same time, qualitative data could be gathered through focus groups with parents to gain deeper insights into changes in behavior and attitudes.

By implementing the strategies inspired by Schell et al. (2013), NewSchools can ensure that each project's evaluation is systematic and thorough. This process measures success in terms of immediate outcomes and considers long-term impacts and sustainability. For instance, tracking the progress of students and parents over multiple years can provide valuable information about the enduring benefits of the programs, thus supporting evidence-based decision-making and continuous improvement.

Moreover, aligning evaluation methodologies with NewSchools' broader organizational goals ensures that the insights gained from these evaluations contribute to strategic planning and resource allocation. For instance, if data from various projects consistently highlight the importance of teacher training in successfully implementing EdTech tools, NewSchools can



prioritize funding and support for professional development programs. The tailored evaluation frameworks also enhance accountability by providing transparent and comprehensive reports to stakeholders, including funders, educators, and the communities served. By clearly demonstrating the tangible, positive changes resulting from its investments, NewSchools can build trust and support for its initiatives.

Adapting principles from Schell et al. (2013) on sustainability and comprehensive evaluation, NewSchools can develop tailored methodologies that enhance accountability and support evidence-based decision-making. This comprehensive approach ensures that NewSchools' investments lead to meaningful and sustainable improvements in the education ecosystem, ultimately advancing its mission to foster innovation and equity in education.

### ***Benchmarking Against Leading Practices***

Benchmarking NewSchools' evaluation methodologies against leading practices in the sector provides a pathway for continuous improvement and sets performance targets. Organizations like the Bill & Melinda Gates Foundation and the Chan Zuckerberg Initiative have established robust frameworks for impact assessment and stakeholder engagement. For example, The Bill & Melinda Gates Foundation's Measures of Effective Teaching (MET) project is particularly influential, providing NewSchools with a model for evaluating teacher effectiveness through comprehensive metrics such as classroom observations, student surveys, and performance assessments. The MET project underscores the importance of building fair and reliable systems for measuring teacher effectiveness, ensuring strategies are inclusive and beneficial for all students, including those with learning differences. This initiative combines quantitative data from student test scores and teacher evaluations with qualitative feedback from classroom observations and student surveys to create a holistic picture of teacher performance.

By adopting similar comprehensive metrics, NewSchools can develop more nuanced and compelling evaluation frameworks for its educational programs. For instance, in evaluating a NewSchools-funded teacher training program to improve instructional techniques for students with learning differences, NewSchools could implement a multi-faceted assessment strategy inspired by the MET project. This would involve conducting regular classroom observations to assess how well teachers are applying new instructional methods, gathering feedback from students and parents to understand these methods' effectiveness, and analyzing student performance data to measure academic improvements.

Additionally, the Chan Zuckerberg Initiative's emphasis on personalized learning and technology integration in education provides another valuable benchmark. By examining how this organization uses data-driven approaches to tailor educational experiences to individual student needs, NewSchools can enhance its strategies for supporting diverse learners. For example, NewSchools could benchmark its adaptive learning technologies against those used by the Chan Zuckerberg Initiative, ensuring that its tools are equally effective in personalizing education and improving student outcomes.

By comparing its strategies with those of these leaders, NewSchools can identify gaps in its processes and adopt best practices to enhance its effectiveness. This comparative approach can help ensure that NewSchools' methodologies are aligned with industry standards and at the forefront of innovation in educational philanthropy. For example, if benchmarking reveals that other organizations achieve higher stakeholder engagement through specific communication strategies or feedback mechanisms, NewSchools can integrate these practices to improve its own stakeholder relations and program outcomes

Benchmarking against leading practices in the education sector allows NewSchools to

continuously refine its evaluation methodologies, ensuring they are comprehensive and innovative. By learning from the successes and methods of prominent organizations like the Bill & Melinda Gates Foundation and the Chan Zuckerberg Initiative, NewSchools can enhance its impact assessment frameworks, drive better outcomes, and maintain its position as a leader in educational philanthropy.

#### **Part IV: Project Question, Theoretical and Conceptual Frameworks**

Recognizing the existing gaps, NewSchools seeks to enhance its understanding of how its current impact metrics and measurement approaches for students with learning differences align with industry standards within the non-profit sector. Identifying key recommendations for improvement is critical to NewSchools' mission of advancing educational equity and innovation. This endeavor is especially crucial as NewSchools reassesses its strategy every three years, ensuring its approaches are responsive to the evolving needs of K-12 education. By developing more robust tools and methodologies, NewSchools can provide stakeholders with comprehensive data analysis capabilities. This enhancement will enable the organization to communicate its impact effectively, attract further investment, and better support its diverse ventures.

To guide this project, we will address the core challenge NewSchools faces: understanding and communicating the impact of their diverse educational initiatives, mainly focusing on the interconnected experiences of teachers, students, and parents, including those involving students with learning differences. The following comprehensive and targeted research question will direct our inquiry:

#### **Research Question**

*In what ways do NewSchools Venture Fund's (NewSchools) current impact metrics and measurement approaches (e.g., impact survey) for students with learning differences (LD) align*

*with industry standards within the non-profit sector, and how can they be improved?*

By addressing this question, we aim to provide NewSchools with actionable insights and recommendations to refine their impact assessment strategies, ensuring they are both practical and aligned with the best practices in the industry. This will ultimately enhance NewSchools' ability to tell compelling stories based on data, inform current and potential funders, and support their ventures more effectively.

### **Theoretical and Conceptual Framework**

Integrating theoretical and conceptual frameworks is essential to optimizing NewSchools' strategic evaluation approach, ensuring a comprehensive understanding of its educational impacts. This methodology begins with the principles of statistical analysis from Kues (2018), which emphasizes the importance of data-driven accuracy and operational precision in NewSchools' assessments. These principles ensure that metrics are standardized and validated, enhancing the reliability of the data collected.

Insights from PPPs, as discussed by Khallaf et al. (2022), are incorporated to leverage strategic collaborations for effective resource management. This approach translates into the conceptual framework by optimizing resources and fostering innovative financing strategies, ensuring that NewSchools can effectively support a wide range of educational initiatives. For example, collaborating with private sector entities can help NewSchools scale its projects more efficiently by pooling financial and operational resources.

Furthermore, the principles of SROI, informed by Moody et al. (2015), underscore the significance of quantifying social impact in venture assessments. This approach ensures that NewSchools' impact metrics not only measure financial outcomes but also capture the broader social benefits of educational programs. This dual focus helps demonstrate the holistic value of

NewSchools' initiatives, providing a clearer picture of their societal contributions.

The ABIOPT Framework by Clevenger & MacGregor (2021) guides the evaluation processes towards inclusivity and fairness, aligning partnerships to reflect diverse educational needs. This inclusivity is crucial for addressing the unique challenges students with learning differences (LD) face. The ABIOPT Framework helps ensure that evaluations are comprehensive and equitable, capturing the diverse impacts of NewSchools' initiatives on various student demographics.

Schell et al. (2013) focus on sustainability in public health programs, introducing a critical lens for examining the long-term viability of educational initiatives. Their framework emphasizes factors such as environmental support, funding stability, and organizational capacity, which are pivotal for sustaining programs to enhance academic outcomes for students with learning differences. NewSchools can develop strategies to ensure its programs remain effective and impactful by adopting these sustainability principles.

Additionally, adopting Social Constructivism and Self-Determination Theory enriches the framework by emphasizing the role of social interactions and individual autonomy in crafting engaging and responsive educational strategies. These theories highlight the importance of creating learning environments that foster collaboration and self-motivation, which are essential for students with learning differences. For instance, implementing collaborative projects and providing students with choices in their learning paths can enhance engagement and motivation.

Lastly, incorporating the Multi-Stakeholder Partnership Theory, as Clarke & Macdonald (2019) discussed, suggests a holistic stakeholder engagement, ensuring that all perspectives are considered in NewSchools' assessments and strategies. This approach optimizes the educational ecosystem for diverse learning communities by fostering a collaborative environment where

stakeholders, including students, educators, and funders, actively contribute to developing and refining impact metrics.

By addressing these frameworks, NewSchools can derive actionable insights and recommendations to refine their impact assessment strategies. Ensuring alignment with industry standards and best practices enhances NewSchools’ ability to tell compelling stories based on data, inform current and potential funders, and support their ventures more effectively. This comprehensive approach ultimately aims to improve the educational outcomes for students with learning differences, demonstrating NewSchools’ commitment to excellence and innovation in impact measurement. The table below summarizes the key aspects that guide NewSchools’ strategic evaluation approach, integrating the theoretical and conceptual frameworks discussed above. This structured alignment ensures a robust methodology for assessing and enhancing the impact metrics for students with learning differences (LD), aligning NewSchools’ practices with industry standards and best practices.

**Table 1: *Theoretical and Conceptual Frameworks Guiding NewSchools’ Impact Assessment***

Theoretical Aspect	Conceptual Framework	Description
Statistical Analysis (Kues, 2018)	Operational Precision	Enhances accuracy and reliability in impact assessments, fostering data-driven methodologies.
Public-Private Partnerships (Khallaf et al., 2022)	Strategic Collaborations	Translates insights into leveraging partnerships for resource management and knowledge sharing.

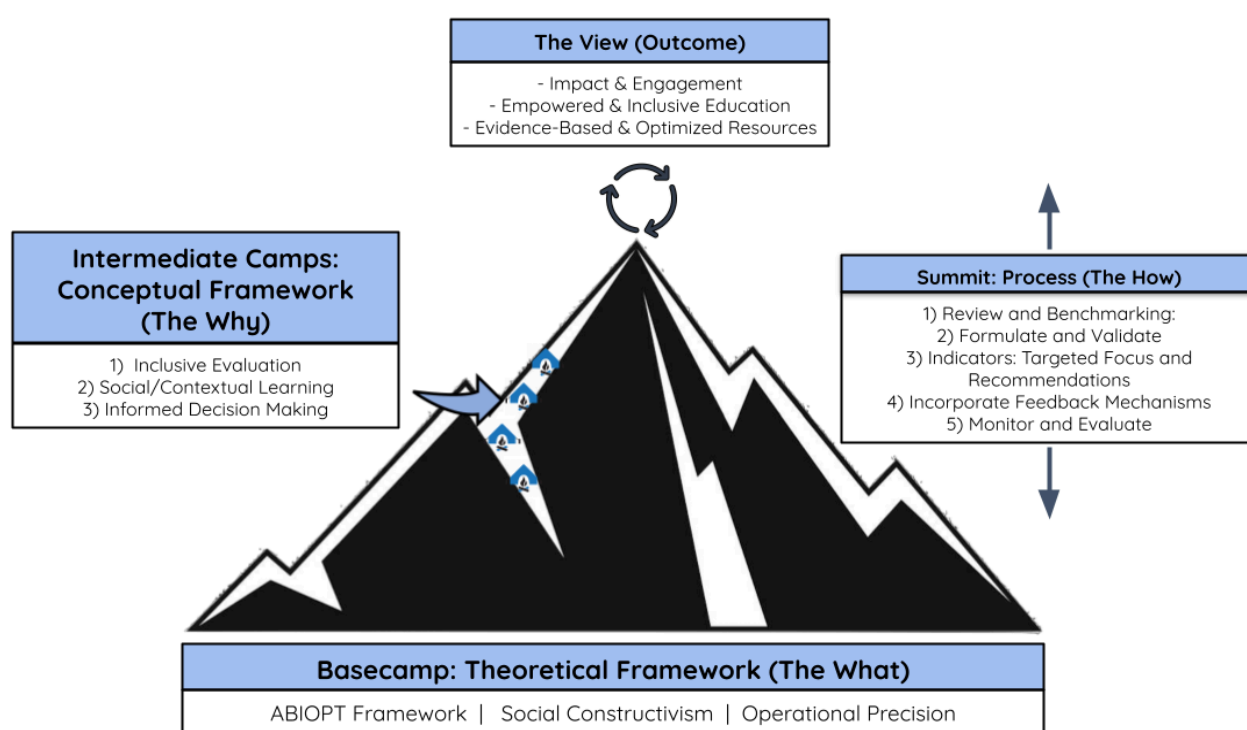
Social Return on Investment (Moody et al., 2015)	Social Impact Emphasis	Reflects on quantifying broader societal benefits and qualitative impacts in venture assessments.
ABIOPT Framework (Clevenger & MacGregor, 2021)	Evaluation Alignment and Inclusivity	It guides equitable and inclusive categorization and alignment of partnerships that reflect diverse needs.
Sustainability Framework (Schell et al., 2013)	Long-Term Viability	Emphasizes ensuring program sustainability through environmental support, funding stability, and organizational capacity.
Social Constructivism & Self-Determination Theory Vygotsky (1978)	Educational Strategy and Engagement	Advocates for engaging, responsive educational strategies tailored to diverse learner needs and motivations.
Multi-Stakeholder Partnership Theory (Clarke & Macdonald, 2019)	Comprehensive Stakeholder Engagement	Ensures stakeholder perspectives are integrated, optimizing the educational ecosystem for diverse learners.

**Conceptual Framework Simplified**

To address our research question—*"In what ways do NewSchool's current impact metrics and measurement approaches for students with Learning Differences (LD) align with industry*

*standards within the non-profit sector, and how can they be improved?"—we have developed a comprehensive conceptual framework. This framework integrates foundational theories and practical methodologies, like a mountain climb, to guide our approach to impact measurement and evaluation at NewSchools.*

**Diagram 1: Conceptual Framework**



At the base of our mountain, we establish three essential base camps, each representing a foundational theory that equips us for the ascent:

1. **ABIOPT Framework (Clevenger & MacGregor, 2021):** This framework creates inclusive evaluation processes considering diverse needs and motivational dynamics. NewSchools must develop metrics that capture the broad spectrum of student experiences, particularly for those with learning differences.



2. **Social Constructivism (Vygotsky, 1978):** This theory emphasizes the importance of collaborative learning and contextual relevance in educational strategies. Leveraging collective educational wisdom helps NewSchools tailor its approaches to be more effective and inclusive.
3. **Operational Precision (Kues, 2018):** Rigorous statistical analysis is essential for ensuring accuracy and reliability in impact assessments. This approach standardizes and validates metrics, enhancing data accuracy and reliability, critical for NewSchools' decision-making processes.

As we climb higher, the intermediate camps represent the integration of these theories into a cohesive strategy:

1. **Inclusive Evaluation and Motivation Dynamics:** Building on the ABIOPT Framework, we focus on developing inclusive metrics that reflect the diverse needs and motivations of students with learning differences. This ensures that our evaluation processes are equitable and comprehensive.
2. **Incorporating Social and Contextual Learning:** Guided by Social Constructivism, we aim to create collaborative and contextually relevant learning opportunities. This approach ensures that educational strategies are adaptable and responsive to the needs of students with learning differences.
3. **Operational Precision:** We emphasize rigorous data collection and statistical analysis. We implement techniques to standardize metrics and validate data, ensuring consistency and comparability and enhancing the reliability of our impact assessments.

To operationalize this framework, we follow a structured process:

1. **Review and Benchmarking:** We assess the effectiveness of NewSchools' initiatives by

analyzing existing survey data and comparing our strategies with industry standards. This aligns with the ABIOPT Framework and Social Constructivism, leveraging collective knowledge and contextual factors.

2. **Formulate and Validate Indicators:** We develop key lagging and leading indicators using impact survey data to validate teacher self-efficacy and innovative teaching methods. This step is grounded in Operational Precision to ensure data accuracy and reliability.
3. **Targeted Focus and Recommendations:** By identifying gaps in NewSchools' current assessment framework, we incorporate specific questions or areas of inquiry into impact surveys. This approach advocates for educational strategies responsive to diverse learner needs, aligning with the ABIOPT Framework and Social Constructivism.
4. **Incorporate Feedback Mechanisms:** Establishing continuous feedback loops with students with learning differences, educators, and stakeholders helps refine educational strategies. Active participation and engagement from all stakeholders ensure the relevance and effectiveness of the programs.
5. **Monitor and Evaluate:** Continuous monitoring and evaluating new impact metrics and strategies enable ongoing refinement and improvement. This process measures and communicates the broader societal benefits of NewSchools' initiatives.

Reaching the summit represents the tangible benefits of our efforts:

1. **Enhanced Impact Metrics:** NewSchools' implementation of rigorous statistical methodologies improves the accuracy and reliability of impact metrics for students with learning differences. For instance, by utilizing validated assessment tools and longitudinal data tracking, NewSchools can better measure students' academic progress

and behavioral changes over time, ensuring that the interventions effectively address their unique needs.

2. **Increased Engagement:** Higher levels of engagement and participation among students with learning differences are achieved through tailored educational strategies. For example, incorporating interactive and adaptive learning technologies that cater to different learning styles helps maintain student interest and motivation, leading to better academic outcomes and increased classroom participation.
3. **Empowered Educators:** Through professional development and training programs, educators feel more competent and autonomous in their teaching methods. NewSchools' support enables teachers to implement evidence-based practices confidently, fostering an environment where they can creatively address the diverse needs of their students. This empowerment translates to improved instructional quality and student achievement.
4. **Inclusive Educational Environment:** Creating a more inclusive and supportive educational environment for neurodivergent students is a priority. This involves implementing universal design for learning (UDL) principles, promoting sensory-friendly classrooms, and supporting social-emotional learning (SEL). Such initiatives ensure that all students feel valued and included, which enhances their overall learning experience and well-being.
5. **Evidence-Based Decision-Making:** NewSchools can make informed choices based on robust data, leading to more effective and equitable interventions. By continuously analyzing data from various programs, NewSchools can identify what works best for different student populations and adapt strategies accordingly. This evidence-based approach ensures that resources are allocated efficiently and that interventions yield the

highest possible impact.

6. **Quantified Social Impact:** Through SROI analysis, the social value generated by NewSchools' initiatives is clearly measured and communicated. This method quantifies the financial benefits and broader social impacts, such as improved quality of life for students and their families, reduced dropout rates, and enhanced community engagement. These metrics help stakeholders understand the total value of NewSchools' work.
7. **Optimized Resource Utilization:** Effective resource use through strategic collaborations with public and private partners ensures that NewSchools' initiatives are sustainable and scalable. By leveraging the strengths of diverse partners, such as technology companies, educational institutions, and community organizations, NewSchools can maximize its reach and impact. For example, partnerships with EdTech companies can provide cutting-edge tools that enhance learning experiences, while collaborations with local organizations can facilitate grassroots support and engagement.

This integrated model ensures that NewSchools' impact metrics align with industry standards by incorporating inclusive evaluation processes, contextual learning, and operational precision. It provides a structured approach to refine and enhance impact metrics, ensuring they are accurate, reliable, and effectively address the needs of students with learning differences. By integrating the ABIOPT Framework, Social Constructivism, and Operational Precision, this conceptual model offers a comprehensive approach to evaluating and improving NewSchools' impact metrics for students with learning differences, ensuring alignment with industry standards and enhancing the effectiveness of measurement approaches. By continually adapting these research-based strategies, NewSchools can underscore its dedication to advancing educational transformation and societal betterment, reinforcing its commitment to creating lasting, positive

educational change.

### **Research Question and Conceptual Frameworks Alignment**

The research question and conceptual framework interplay is enriched by incorporating Social Constructivism, Self-Determination Theory (SDT), and organizational design theories, each contributing to a nuanced understanding and enhancement of NewSchools' impact assessment methodologies. Social Constructivism, drawing from Vygotsky (1978), emphasizes leveraging collective knowledge within the education sector, guiding the review and benchmarking phase to compare and refine NewSchools' strategies through a lens of social interaction and collaborative learning. This approach not only underlines the importance of contextual and social factors but also aligns with the strategic overview to develop effective educational support strategies. Similarly, SDT, as expounded by Deci & Ryan (2000) and further developed by Ryan & Deci (2017), plays a pivotal role in the evidence-based validation stage by focusing on nurturing autonomy and competence among educators and students. This theory ensures that the validation process emphasizes empowering and effective educational practices, addressing the research question's call for precise and equitable evaluations.

Furthermore, the organizational design process is implicitly interwoven throughout the conceptual framework, guiding the structured approach to assess, refine, and innovate within NewSchools' operational strategies. This includes a targeted focus on sub-groups within the learning differences spectrum, advocating for a personalized and supportive educational environment responsive to diverse needs and contexts. The central goal of enhancing impact assessment and communication in NewSchools' ventures is at the intersection of these theories and the organizational design process. This integration ensures that the evaluations support students with learning differences and are comprehensive, inclusive, and strategically aligned

with NewSchools’ mission. Below is a table that illustrates how each research question relates to the theoretical and conceptual frameworks.

**Table 2: Alignment of Research Question Components with Conceptual Framework**

<b>Research Question Component</b>	<b>Theoretical Framework</b>	<b>Conceptual Framework Component</b>	<b>Connection to NewSchools</b>
Refinement of Assessment Methods	Statistical Analysis (Kues, 2018)	Enhancing Operational Precision	Improves accuracy and relevance in NewSchools' evaluations.
Understanding the Impact on Diverse Stakeholders	Public-Private Partnerships (Khallaf et al., 2022), Social Return on Investment (Moody et al., 2015)	Leveraging Partnerships, Emphasizing Social Return	Broadens the impact assessment to include diverse stakeholder perspectives, especially those with learning differences.
Fair and Comprehensive Evaluations	ABIOPT Framework (Clevenger & MacGregor, 2021)	Applying the ABIOPT Framework	Adapts evaluation processes to be inclusive and mindful.
Sustainable Evaluations	Sustainability Framework (Schell et al., 2013)	Ensuring Long-Term Viability	Emphasizes sustainability through environmental support, funding stability, and organizational capacity.
Incorporating Social and Contextual Learning	Social Constructivism (Vygotsky, 1978;	Review and Benchmarking	Leverages collective educational wisdom to refine

	John-Steiner & Mahn, 1996)		NewSchools' strategies and foster collaborative learning.
Nurturing Autonomy and Competence	Self-Determination Theory (Deci & Ryan, 2000; Ryan & Deci, 2017)	Evidence-Based Validation	Validates strategies that empower educators and students, emphasizing autonomy and competence.
Tailored Educational Strategies	Social Constructivism & SDT, Organizational Design Theories	Targeted Focus and Recommendations	Advocates for a responsive, personalized educational environment guided by learner diversity and organizational strategy.
<b>Central Goal:</b> Enhance Impact Assessment and Communication	Integrated Frameworks	Central Goal of Project	To ensure NewSchools' assessments are data-driven, precise, equitable, and reflective of the diverse needs of students with learning differences.

By integrating Social Constructivism and Self-Determination Theory, we present a theoretical framework highlighting the significance of social context and individual agency in the educational process. This framework guides the proposed strategic approach and aligns with NewSchools’ mission to support diverse learning communities effectively. This structured and strategic approach is designed to assess and enhance NewSchools’ initiatives significantly. By

extracting deeper insights from existing data and refining the assessment process, the aim is to cultivate a more impactful and inclusive educational environment for students with learning differences. This initiative champions evidence-based decision-making and underscores the importance of customized educational strategies, which are vital in the ever-evolving landscape of academic needs and methodologies.

Moreover, this approach affirms NewSchools' commitment to DEI, ensuring that interventions are effective but also equitable and comprehensive. It specifically addresses the unique needs of students with learning differences, promoting both impactful and extensive strategies. Without such a focused and efficient assessment, educational disparities may continue or even widen, posing a challenge to NewSchools' mission of providing equitable access to quality education for all students with learning differences.

## **Part V: Project Design**

### **Overview**

The project design enhances NewSchools' impact assessment process through a comprehensive review and benchmarking of existing strategies. By leveraging social constructivism principles, the project examines current survey data to identify gaps and compare NewSchools' initiatives against best practices from leading organizations. This approach aims to foster a more inclusive and effective educational environment for students with learning differences, ensuring that interventions are impactful and equitable. NewSchools strives to support diverse learners and promote innovative educational practices through evidence-based validation and continuous improvement.

### **Review and Benchmarking**

The project design begins by examining existing survey data from NewSchools to assess



the effectiveness of its initiatives in supporting educators and students with learning differences. This phase leverages social constructivism by incorporating collective knowledge within the education sector (Vygotsky, 1978). Social constructivism emphasizes the importance of social interactions and cultural contexts in learning, suggesting that knowledge is constructed through collaborative efforts and shared experiences. John-Steiner and Mahn (1996) further expand on this by discussing the importance of sociocultural approaches to learning, where social interactions and cultural tools deeply influence cognitive development. Their work underscores the necessity of creating learning environments that foster collaboration and utilize cultural resources effectively.

To benchmark NewSchools' strategies, the project compares its initiatives against those of other organizations that provide similar support. Benchmarking involves identifying best practices, learning from peers, and understanding the strengths and weaknesses of current approaches. This process is essential for continuous improvement and innovation in educational practices. Consider NewSchools' initiative to integrate digital learning tools for students with LD. To benchmark this initiative, NewSchools looks to the approach taken by the Bill & Melinda Gates Foundation. Their Measures of Effective Teaching (MET) project is a comprehensive endeavor that evaluates teacher effectiveness through classroom observations, student surveys, and performance assessments. By analyzing this project, NewSchools can identify successful strategies and potential areas for improvement. For example, the MET project's use of detailed classroom observations can inspire NewSchools to implement more rigorous and systematic observation protocols to better understand the instructional practices that benefit students with learning differences.

In another scenario, the significance of formative assessment in enhancing student

learning, as highlighted by Black and Wiliam (1998), provides a model for NewSchools. Formative assessment involves ongoing feedback and adjustments to teaching strategies based on student performance. NewSchools examines how high-performing schools use real-time data to adjust instruction, provide targeted support, and engage students in self-assessment. Observing these practices, NewSchools might implement a pilot program where teachers use digital tools to provide instant feedback to students, helping to identify and address learning gaps more effectively.

Additionally, as outlined by Vygotsky (1978) and expanded upon by John-Steiner and Mahn (1996), social constructivism emphasizes collaborative learning environments where students learn through interactions with peers and teachers. NewSchools can explore programs like the collaborative classrooms initiative by the Chan Zuckerberg Initiative. This program creates flexible learning environments that foster student collaboration and personalized learning. Inspired by this, NewSchools could develop similar classroom setups that encourage group work and peer-to-peer learning, which is particularly beneficial for students with learning differences.

These examples make it clear how NewSchools can leverage benchmarking to enhance its programs by adopting proven strategies and continuously improving its initiatives. This process ensures that NewSchools remains at the forefront of educational innovation and helps create a more inclusive and supportive educational environment for students with learning differences.

### **Evidence-Based Validation**

The subsequent phase of the project involves a rigorous evidence-based validation process, focusing on critical indicators such as teacher self-efficacy, innovative teaching

methods, and student engagement. This stage draws on the foundational principles of Self-Determination Theory as articulated by Deci and Ryan (2000) and further developed by Ryan and Deci (2017). SDT provides a framework for validating strategies that nurture autonomy, competence, and relatedness among educators and students, ensuring that educational practices are empowering and effective. Professional development programs were designed based on SDT principles in the context of teacher self-efficacy. These programs aimed to enhance teachers' autonomy by allowing them to select digital tools to integrate into their classrooms, supported by continuous feedback mechanisms. Over time, the effectiveness of these programs was measured through surveys and performance assessments, which demonstrated significant improvements in teachers' instructional capabilities and confidence. This validation underscores the importance of autonomy and competence in fostering teacher development and effectiveness.

Similarly, implementing innovative teaching methods aimed at promoting student-centered learning was evaluated. Rooted in SDT, these methods were designed to increase student engagement by providing greater control over the learning process. For instance, middle school science classes adopted project-based learning approaches, where students selected their projects based on personal interests. Data on student participation rates, academic performance, and qualitative feedback from students and teachers were collected and analyzed. The findings indicated a marked increase in student motivation and engagement, validating the success of these teaching methods in fostering a more interactive and relevant learning experience.

Furthermore, the introduction of personalized learning plans was scrutinized to assess their impact on student autonomy and competence. These plans allowed students to set

individualized learning goals and progress at their own pace, aligning with SDT principles. The validation process involved collecting student progress, engagement, and satisfaction data. Results showed significant improvements in academic performance and self-perception of competence among students with learning differences, demonstrating the efficacy of personalized learning strategies in supporting diverse learning needs.

This evidence-based validation process ensures that NewSchools' educational assessment practices are theoretically robust, practically effective, and empowering. By continuously validating and refining these strategies, NewSchools can ensure that its initiatives create an environment conducive to the thriving of both educators and students. This rigorous approach to validation is integral to NewSchools' mission of promoting innovative and effective educational practices grounded in research and tailored to meet the needs of diverse learners.

### **Targeted Focus and Recommendations**

The strategy aims to identify gaps in NewSchools' current assessment framework by focusing on specific sub-groups within the learning differences spectrum. Based on insights from the benchmark analysis, it suggests incorporating particular questions or areas of inquiry into NewSchools' impact surveys. This tailored approach reflects both Social Constructivism and Self-Determination Theory by advocating for educational strategies responsive to learners' diverse needs and contexts, promoting a more personalized and supportive academic environment (Turner, Perry, & Meyer, 2006).

The necessity of this challenge, particularly for students with learning differences, is underscored by several compelling reasons within the context of NewSchools' work. Accurate and comprehensive impact assessment, leveraging existing data, is fundamental for accountability and effective resource allocation. This approach promotes evidence-based

decision-making, enabling NewSchools to make informed choices and significantly reducing the risk of ineffective or misaligned investments. This is crucial when devising educational strategies for students with learning differences, highlighting the importance of a tailored rather than a one-size-fits-all approach.

Moreover, a profound understanding of the impact derived from existing data sources facilitates continuous learning and improvement. This is essential for identifying successful strategies, recognizing areas needing adjustments, and innovating effectively, which is crucial in the dynamic landscape of educational needs and methodologies. As Turner, Perry, and Meyer (2006) emphasize, contextualized perspectives on motivation offer new ways of thinking about and studying motivation in classrooms. They reveal how student characteristics are related to classroom features and how these interactions are fused with motivational experiences, underscoring the importance of a customized and adaptive approach to education.

Our approach is not about developing new metrics but enhancing NewSchools' impact assessment process by identifying missing elements through benchmark analysis. The goal is to foster a more impactful and inclusive educational environment for students with learning differences, supporting evidence-based decision-making and the importance of customized educational strategies in the dynamic landscape of academic needs and methodologies. Moreover, this methodology underlines NewSchools' commitment to DEI by ensuring effective and equitable interventions. It specifically addresses the unique needs of students with learning differences, promoting both impactful and extensive strategies. Through a focused assessment on equity and impact for students with learning differences, NewSchools aims to prevent the perpetuation of educational disparities, ensuring all students have equitable access to quality education and opportunities.

In its commitment to effectively supporting students with learning differences, NewSchools adopts this benchmark-based analysis across its diverse ventures within a structured framework. The aim is to suggest enhancements to the existing data analysis framework by identifying gaps through a comprehensive review of current practices and benchmarking against leading organizations. This approach aligns with NewSchools' dedication to continuous improvement and data-driven decision-making, enhancing its ability to understand and communicate its ventures' immediate and long-term effectiveness, particularly in supporting students with learning differences.

Regarding impact communication, NewSchools is focused on enhancing methods for internal understanding and application of insights during a 28-week timeframe. This involves optimizing existing communication channels for internal decision-making and shifting from external storytelling to a more introspective, data-driven decision-making process. With surveys scheduled for October 2024, NewSchools has set a structured timeline for data collection, reflecting a methodical approach to data gathering and analysis. This regular data collection process is fundamental to their decision-making and support planning.

The desired state for NewSchools in this project is to enhance their understanding of impact, particularly focusing on teacher, family, and student outcomes in the context of learning differences. Achieving this within the research period is crucial for NewSchools to improve its support effectiveness, ensure strategic resource allocation, and contribute to the broader transformation of the education ecosystem, especially for students with learning differences.

## **Part VI: Data Collection Methodology**

### **Overview**

A meticulously designed data collection methodology is essential to evaluate and

enhance the impact assessment methods employed by the NewSchools. This methodology provides comprehensive insights into the efficacy and scope of NewSchools’ impact evaluations, ensuring alignment with industry standards and the organization’s strategic goals. By integrating diverse data sources and employing rigorous analytical techniques, this approach aims to identify actionable insights that can continuously improve NewSchools’ initiatives, particularly in supporting students with learning differences.

**Collection Method and Research Question**

The data collection matrix delineates the systematic methodology for investigating NewSchools’ project, focusing on evaluating and enhancing the impact assessment methods. The matrix is designed to capture the multifaceted nature of the primary research question, breaking it down into specific components. For each element, the matrix identifies the relevant data sources, collection techniques, and analytical methods required to derive comprehensive insights into the efficacy and scope of NewSchools’ impact evaluations. This structured approach thoroughly examines current practices and highlights areas for improvement, thereby facilitating evidence-based decision-making and strategic planning.

**Table 3: Data Collection Matrix**

Question Component	Data Source	Data Collection Method	Analysis Procedure
Understanding Industry Standards Within the Non-profit Sector	Recent research, Industry reports	Literature review of current practices and standards	Deductive (applying existing theories to current practices)

Refinement of Impact Assessment Methods	Existing NewSchools' impact surveys, Internal reports	Review and analysis of recent survey data	Mixed Methods (using existing theories and generating new insights)
Understanding the Impact on Diverse Stakeholders	Surveys from ventures, Feedback from teachers, students, and parents	Analysis of feedback forms, Surveys, Interviews	Inductive (generating theories based on observed data patterns)
Supporting Students with Learning Differences	Documentation on ventures, Academic research	Document analysis, Literature review	Mixed Methods (combining theoretical frameworks with empirical data)
Identifying and Mitigating Biases	Venture reports, Academic literature on assessment biases	Document analysis, Literature review	Deductive (applying known theories of bias in evaluation)
Ensuring Fairness and Equity in Assessments	Policy documents, Equity and inclusion guidelines	Review of policy documents, Expert interviews	Deductive (applying principles of fairness and equity to methods)
Review and Benchmarking	Comparative studies, Partner organization data	Comparative analysis, Benchmarking against industry standards	Deductive and Inductive (leveraging comparative insights to refine strategies)
Evidence-Based Validation	Impact survey data, Current educational research	Data analysis, Correlation with contemporary research findings	Deductive and Inductive (validating strategies with a foundation in current research)



Targeted Focus and Recommendations	Subgroup specific data, Organizational feedback	Targeted surveys, Focused group discussions	Inductive (tailoring recommendations based on specific insights)
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**Methods**

Our approach to enhancing NewSchools’ impact assessment methods involved a three-tiered methodology:

1. **Benchmarking Against Industry Standards:** The initial phase focused on benchmarking NewSchools’ impact assessment methods against industry standards set by peer organizations. This process began with a comprehensive literature review to examine best practices and innovative approaches utilized by leading non-profit organizations in the education sector. Through comparative analysis, we identified strengths and weaknesses in NewSchools’ current methods by juxtaposing them with those of established leaders. This comparison allowed us to highlight areas where NewSchools’ impact assessment processes could be improved to meet or exceed industry standards. Additionally, we analyzed detailed case studies of successful organizations to extract actionable insights and practical strategies. By benchmarking against industry standards, we aimed to uncover opportunities for improvement and innovation within NewSchools’ current impact assessment processes, ensuring that they align with best practices in the field.
2. **Evidence-Based Validation:** The second phase employed evidence-based validation techniques to evaluate the effectiveness of NewSchools’ current impact assessment methods. We conducted in-depth interviews with senior staff and key stakeholders at NewSchools to gather qualitative data on their experiences and perspectives. Using

thematic analysis, we identified common themes, challenges, and successes reported by interviewees. This qualitative analysis was complemented by a review of existing survey data, allowing us to cross-validate the qualitative insights with quantitative evidence. Ensuring our findings and recommendations were grounded in the practical realities faced by the NewSchools' team was crucial, as it aligned our insights with the real-world experiences of the NewSchools' team, thereby ensuring that our recommendations were both relevant and practical.

3. **Conceptual Framework Analysis:** The final phase involved applying our conceptual framework to analyze and refine NewSchools' existing impact measurement tools. We conducted a comprehensive document review, examining current survey questions and internal reports to categorize and evaluate the existing impact measures. We ensured a robust analytical foundation by mapping identified gaps against theoretical frameworks such as Social Constructivism and Self-Determination Theory. This gap analysis allowed us to identify areas where NewSchools' assessments could be enhanced to provide more accurate and comprehensive insights. Integrating insights from the theoretical mapping with practical recommendations enabled us to systematically improve the impact assessment tools. By applying a rigorous conceptual framework, we evaluated and refined NewSchools' impact assessment methods, ensuring they provided a more accurate and comprehensive understanding of their impact on diverse stakeholders.

### **Interview Design**

The interview questions were meticulously crafted to extract deep insights into how the experiences and perceptions of these key individuals align with and help shape the organization's strategic approach. This design aligns with our theoretical frameworks—Social Constructivism and Self-Determination Theory—which emphasize the significance of individual agency and the

social context in educational settings. Social Constructivism highlights the role of social interactions and cultural context in the construction of knowledge, while Self-Determination Theory focuses on individuals' intrinsic motivation and autonomy. By incorporating these frameworks, our interview design explores how leaders perceive and contribute to the organization's strategic goals.

Understanding the perspectives of these leaders is crucial for assessing the effectiveness and equity of the organization's strategies. Their insights provide valuable context for evaluating how well NewSchools' initiatives meet their intended goals and how they can be improved to serve diverse learner populations better. This approach ensures that our assessment is grounded in the real-world experiences of those at the forefront of implementing these strategies, providing a comprehensive view of their impact and effectiveness.

By aligning the interview questions with these theoretical frameworks, we aim to uncover the nuanced ways individual perceptions and experiences influence the organization's strategic initiatives. This deeper understanding will inform our recommendations, ensuring that they are both theoretically sound and practically relevant, ultimately enhancing the effectiveness and inclusivity of NewSchools' educational strategies.

### ***Rationale for Limited Sample Size***

In this context, the seemingly small sample size of four participants is not a limitation but a deliberate and strategic choice. These individuals constitute 100% of the target population for this specific inquiry, ensuring comprehensive insight into the organizational knowledge and decision-making processes that impact educational initiatives for students with learning differences. This total coverage approach guarantees we capture the complete spectrum of perspectives from those with significant influence and leadership within the organization.

It is crucial to emphasize that while the number of participants is small, it represents a complete view of organizational leadership and influence. Each participant brings unique insights and critical experiences that collectively provide a holistic understanding of how strategic decisions are made and how these decisions affect educational outcomes. By engaging the entire population of key decision-makers, we ensure that our findings are robust, exhaustive, and reflective of the collective wisdom and direction of the organization.

This approach allows us to delve deeply into the intricacies of organizational strategies, offering a rich and nuanced analysis that would not be possible with a broader but less focused sample. Consequently, the insights gained are comprehensive and highly relevant, providing a solid foundation for assessing and enhancing NewSchools' initiatives for students with learning differences.

### ***Justification for Selecting Interview Participants***

Given our project's specialized focus, we have strategically selected all four members within the organization who possess essential institutional knowledge of learning differences and wield significant influence over funding decisions for related initiatives. These individuals are integral to the organization, representing a critical segment that directly shapes strategies aligning with the NewSchools' mission to support diverse learning communities effectively.

By selecting these key participants, we ensure that our inquiry taps into the most bottomless reservoirs of expertise and decision-making power within the organization. Their roles and responsibilities place them at the forefront of developing and implementing initiatives that cater to students with learning differences. As such, their insights are invaluable for understanding the nuances of current strategies and identifying opportunities for enhancement.

This targeted selection process guarantees that we capture perspectives from those most

knowledgeable and influential in the areas directly relevant to our project. It also ensures that our findings and recommendations will be based on comprehensive, informed viewpoints that reflect the organization's strategic priorities and operational realities. Ultimately, engaging these pivotal members allows us to develop a thorough and accurate assessment of how NewSchools can continue to support and advance educational outcomes for diverse learners.

### **Part VII: Data Analysis**

The methodology we leveraged allowed us to analyze the data we collected from key stakeholders and our research further. Understanding what peer institutions are currently doing to monitor the progress of investments illuminated vital metrics that could be used as industry standards for assessing effectiveness. We interviewed critical stakeholders in NewSchools to illustrate patterns and trends, highlighting current strengths and gaps that NewSchools is grappling with as they embark on their new strategy initiatives for 2024-2026. Lastly, analyzing current tools NewSchools uses for assessing impact through document review elevated the tool's purpose. It allowed us to highlight patterns in the questions that could be strengthened to evaluate further the impact of investments on ventures that impact students with learning differences.

### **Benchmarking Against Industry Standards**

We benchmarked against leading institutions to align our impact metrics with industry standards and best practices. Our peer institutions include the Bill & Melinda Gates Foundation (the MET project: Measures of Effective Teaching), Chan Zuckerberg Initiative, Reach Capital, The EdTech Fund, and Social Venture Partners (SVP). These organizations are leaders in educational innovation and impact assessment, especially for students with learning differences.

Addressing the unique needs of students with learning differences is crucial for

NewSchools. Research, such as Fletcher et al. (2019), highlights the importance of tailored assessment methods beyond standard metrics. The Bill & Melinda Gates Foundation's MET project evaluates teaching effectiveness through comprehensive metrics like classroom observations, student surveys, and performance assessments, ensuring effective strategies for all students, including students with learning differences. The MET project supports NewSchools' goals of building fair, reliable systems for measuring teacher effectiveness that benefit students with learning differences.

The MET project provides several valuable insights that align with NewSchools' goals. The project aims to capture student achievement gains to assess higher-order conceptual understanding, classroom observations, and teacher reflections by using video observations to identify adaptable teaching strategies and assessments of teachers' pedagogical content knowledge to measure knowledge for addressing diverse learning needs. Additionally, the MET project leverages student perceptions of the classroom environment by using specific survey instruments to assess engagement and support and teachers' perceptions of working conditions to ensure teachers receive adequate instructional support.

In addition to insights from the MET project, other peer institutions offer valuable approaches. The Chan Zuckerberg Initiative centers its work on individualized learning and using tech to support diverse educational needs in the classroom. Their data-driven approaches to measuring program effectiveness and technology integration in classrooms provide tailored learning experiences, especially for students with learning differences. Reach Capital also invests in individualized learning and technology but uses adaptive learning technologies to improve engagement for students with learning differences. The EdTech Fund invests in educational tools to enhance learning for all students. Lastly, Social Venture Partners, uses frameworks like the

SROI to evaluate initiatives, ensuring investments lead to meaningful social impact, including for students with learning differences.

In an attempt to name industry standards from our research on peer institutions and to ensure we are on par with leading practices, we focus on several key areas:

- **Student Outcomes:** Measuring academic achievements and progress of students, including those with learning differences.
- **Teacher/Educator Impact:** Assessing the effectiveness and development of educators in supporting diverse learners.
- **Organizational Growth:** Evaluating the expansion and sustainability of our programs tailored to students with learning differences.
- **Community and Family Engagement:** Gauging the involvement and support of families and communities in our initiatives is crucial for supporting students with learning differences.

Based on the work of these organizations, we have identified several leading indicators to provide early signs of progress and effectiveness:

- **Student Engagement:** Tracking how actively students, including students with learning differences, participate in our programs.
- **Initial Skill Gains:** Measuring early improvements in students' skills, focusing on students with learning differences.
- **Teacher Feedback:** Collecting input from educators on program effectiveness, particularly in supporting students with learning differences.
- **User Adoption Rates for Technology:** Monitoring how quickly and widely new technologies tailored for students with learning differences are adopted.

- **Program Attendance:** Keeping track of attendance rates in our various programs, focusing on students with learning differences participation.

Additionally, we use the following lagging indicators to measure long-term outcomes:

- **Academic Performance:** Evaluating students' grades and test scores, with particular attention to students with learning differences.
- **Graduation Rates:** Tracking the percentage of students, including students with learning differences, who complete their education.
- **College and Career Readiness (CCR):** Assessing how prepared students are for post-secondary education and the workforce, particularly those with learning differences.

### **Evidence-Based Validation**

There were key trends we highlighted from the interviews we conducted. NewSchools uses templates and coaching to help its ventures that do not have logic models. Standards vary according to NewSchools' subgroup ventures' capacity and funders' requirements. NewSchools views industry standards as (1) non-existent; (2) anecdotal; (3) varying by type of venture's performance, e.g., academic outcomes or attendance in the case of schools; or (4) demographics and reach, defined as the amount of money raised or several programs funded.

The further away from students a venture is, the harder it is for NewSchools to get data. NewSchools is also interested in measuring the personal development of the ventures' founders (e.g., mindset, confidence, and optimism). NewSchools has had three challenges in identifying industry standards. First, there is a question of which industry: philanthropy or venture capital. Second, the small number of peers means data is scarce. Third, it is challenging to standardize metrics across diverse early-stage ventures.



## **Conceptual Framework Analysis**

As we mentioned, NewSchools administers an impact survey to measure the outcomes of its ventures. In addition to the impact survey, every venture gets a standardized questionnaire and an additional set of questions that varies according to their portfolio. The survey has diverse questions that capture information about organizational leadership, financial stability, sustainability, business models, stakeholder growth, and reach. As it stands, the survey allows for a comprehensive view of an organization and provides key data that NewSchools uses to assess the effectiveness of its current strategy.

Approximately 27% of the Learning Differences Impact Survey questions address the impact on some level. Some questions directly address this impact while others indirectly collect this information. These questions range from explicit information to assess impact. In contrast, other questions can gather more context and demographic data to inform the diversity and needs of the populations each venture is serving.

The current survey has strengths in capturing information on NewSchools focus on DEI, financial and revenue data, reach and impact metrics, efficacy, and research. However, the impact survey does not have specific questions linked to measuring these ventures' impact on students with learning differences. There is also a big emphasis on quantitative data and little room for qualitative feedback to capture the more nuanced context of the work with students with learning differences. The impact survey also positions itself to capture information isolated to a single fiscal year, where there could be some value in having longitudinal data to assess changes from year to year. Other key gaps that were elevated through our document review were the lack of stakeholder feedback and a lack of alignment with standardized impact frameworks like the SROI.

## **Part VIII: Findings**

Our findings are structured to provide actionable insights that will enhance the NewSchools' impact assessment methods. By leveraging benchmarking, evidence-based validation, and a thorough document review, we aim to offer a nuanced understanding of NewSchools' current practices, identify gaps, and propose strategic enhancements. This analysis is critical for ensuring that NewSchools' initiatives are practical, inclusive, and aligned with industry standards, ultimately supporting diverse learners more effectively.

### **Benchmarking**

One of the key areas identified through our benchmarking process is the measurement of student outcomes. It is essential to track students' academic achievements and progress, which includes monitoring improvements in grades, test scores, and other academic indicators. This data is crucial for assessing the effectiveness of educational interventions and ensuring that students benefit from the programs. NewSchools can determine whether their implemented programs achieve the desired results by monitoring student outcomes. This is vital for making informed decisions about continuing, modifying, or discontinuing strategies.

Additionally, data on student outcomes allows for accountability, ensuring that educational initiatives are being implemented and producing tangible benefits for the students. This accountability is vital for maintaining the trust and support of stakeholders, including funders, educators, parents, and the students themselves. Understanding students' academic progress helps identify gaps and areas that require additional support. If certain groups of students are not showing the expected improvements, targeted interventions can be designed to address their specific needs, ensuring a more personalized and practical approach to education.

Another critical focus is the impact on teachers and educators. For several reasons,

assessing their development and effectiveness in supporting diverse learners is crucial. First, evaluating training programs, teaching methods, and the overall impact of educators on student learning outcomes provides insights into how sound educators are equipped to meet the needs of diverse learners. This understanding helps refine professional development initiatives and teaching strategies, ensuring educators continually improve their skills and methods.

Additionally, understanding the impact of educators is essential for recognizing and replicating successful teaching practices, which can be scaled across different programs and institutions to enhance overall educational quality.

Evaluating the expansion and sustainability of NewSchools' programs tailored to students with learning differences is also essential. Assessing these programs' scalability and long-term viability ensures that successful programs can reach more students and have a lasting impact on the education system. This evaluation helps NewSchools understand which programs can be expanded to serve a larger population without compromising quality. Moreover, sustainability assessments ensure that programs are designed to be resilient and adaptable to changing educational needs and resources, securing their impact over the long term.

Finally, for several reasons, gauging the involvement and support of families and communities in NewSchools' initiatives is vital. Engaging families and communities helps understand educational programs' broader impact and ensures that all stakeholders are involved and supportive. This involvement is crucial for creating a holistic student support system, where families and communities actively contribute to the educational process. Additionally, strong community and family engagement can lead to better student outcomes, as students are more likely to succeed when they have support inside and outside the classroom. This holistic approach fosters a supportive environment for students and enhances the overall effectiveness of

educational interventions.

By focusing on student outcomes, teacher and educator impact, organizational growth, and community and family engagement, NewSchools can provide comprehensive insights and recommendations that will enhance its impact assessment methods. This approach ultimately effectively supports diverse learners, ensuring that NewSchools' initiatives are impactful and aligned with industry standards.

### **Evidence-Based Validation**

Through our evidence-based validation, we identified several critical components to the success of NewSchools' impact assessment methods. First, the support for ventures, both financial and managerial, plays a significant role. NewSchools provides financial support from \$150,000 to \$250,000 and strategic guidance from relationship managers. Understanding how this support translates into tangible outcomes is essential for measuring impact. This involves tracking financial metrics and evaluating how strategic guidance contributes to the ventures' growth and sustainability. By analyzing these aspects, NewSchools can ensure that its investments drive meaningful and lasting improvements, helping ventures thrive and maximize their impact on education.

Measuring success for NewSchools means assessing the ability of ventures to “survive and thrive.” This goes beyond mere survival, emphasizing the importance of scaling impact effectively. Evaluating these success metrics helps NewSchools understand the long-term sustainability of its investments. Examining how ventures grow over time, adapt to challenges, and expand their reach is crucial. This comprehensive understanding of success ensures that NewSchools support fosters ventures capable of making a significant, enduring difference in their respective fields. By continuously measuring and analyzing these metrics, NewSchools can

refine its support strategies to enhance the effectiveness and reach of its investments.

NewSchools' theory of change is another essential component of its impact assessment. The model's effectiveness stems from combining the organization's understanding of early-stage start-ups with the deep knowledge that partner organizations have of their communities. This synergy is crucial for driving impactful change. By leveraging the strengths of both NewSchools and its partners, the model facilitates the creation of innovative solutions tailored to the specific needs of various communities. Evaluating the theory of change involves examining how these partnerships contribute to the success of ventures and achieving desired outcomes. This understanding allows NewSchools to refine its collaborative strategies and ensure that their combined efforts lead to meaningful and sustainable improvements in education.

Expanding the focus of impact measurement from "schools and tools" to "schools, tools, and people" is another critical aspect. This broader approach includes assessing the impact on teachers and students and providing a more comprehensive understanding of educational outcomes. By evaluating how programs and tools affect the individuals involved, NewSchools can gain deeper insights into the effectiveness of its initiatives. This expanded measurement helps capture the full scope of the organization's impact, ensuring that all facets of the educational ecosystem are considered. By doing so, NewSchools can better tailor its programs to meet the needs of both educators and students, enhancing the overall quality and effectiveness of educational interventions.

The themes for impact measurement proposed by NewSchools include innovation, DEI, and an expanded definition of student success. Measuring these themes helps NewSchools capture a holistic view of its impact. Innovation assessment involves evaluating how ventures introduce and scale new ideas. DEI measurement examines how programs promote inclusive

practices and equitable outcomes. An expanded definition of student success looks beyond academic achievements to include personal growth and other well-being indicators. By focusing on these themes, NewSchools can ensure that its programs foster a supportive and inclusive educational environment that promotes the success of all students.

Lastly, NewSchools provides support tools such as templates and coaching for ventures that lack logic models, helping them develop robust impact assessment frameworks. Measuring the personal development of founders and other qualitative aspects adds depth to the impact assessment. These support tools ensure that all ventures have the resources to measure and communicate their impact effectively. By focusing on the personal development of founders, NewSchools can also assess how its support influences leadership and organizational growth. This comprehensive support ensures that ventures are successful in their missions and sustainable and capable of scaling their impact over time.

Focusing on these critical components—support for ventures, measuring success, theory of change, extended impact measurement, themes for impact measurement, and support tools—ensures a comprehensive and nuanced approach to impact assessment. This approach evaluates financial and operational metrics and considers the broader, qualitative aspects of success, providing a holistic view of the organization's impact. By continuously refining and improving these methods, NewSchools can enhance its ability to support diverse learners and drive meaningful educational change.

## **Conceptual Framework Analysis**

### **Documentation**

From NewSchools' documentation, we discovered several key focus areas and standard processes integral to the organization's impact assessment methods. NewSchools prioritizes the financial sustainability of its ventures, their potential for growth, and their progress towards

self-identified goals. These focus areas are critical for understanding the long-term impact and sustainability of NewSchools initiatives. Financial sustainability ensures that ventures can continue operating and scaling without constant dependency on external funding. Evaluating the growth potential allows NewSchools to invest in ventures that can significantly expand their impact over time. Tracking progress towards self-identified goals helps determine whether ventures are achieving their intended outcomes, ensuring alignment with their mission and NewSchools' broader objectives. By focusing on these areas, NewSchools can ensure that its investments lead to sustainable and scalable educational innovations that benefit students over the long term.

NewSchools employs a standard application process and an annual impact survey. These processes are partially standardized and partially team-specific, allowing for flexibility while maintaining consistency in data collection. The standardized elements ensure that essential data is collected uniformly across all ventures, facilitating comparative analysis and aggregate reporting. The team-specific components allow for customization based on different ventures' unique needs and contexts, ensuring that the data collected is relevant and actionable. This balance between standardization and flexibility is crucial for obtaining comprehensive and meaningful insights.

While NewSchools has adopted some measures for evaluating the impact on students with learning differences, there is no standard set of questions for LD ventures. Instead, NewSchools asks organizations about their measures and outcomes, highlighting the need for a more standardized approach. A standardized set of questions would ensure that data on learning differences is consistently collected and comparable across different ventures. This would allow NewSchools to more effectively assess the impact of its initiatives on students with learning

differences, identify best practices, and make informed decisions about future investments and interventions.

NewSchools attempts to measure neurodiversity representation by asking whether teachers were in general or special education. However, it does not request data on the number of neurodiverse adults served, assuming this information would be unavailable. This indicates a need for more comprehensive data collection on neurodiversity. Collecting detailed data on neurodiversity representation would provide a clearer picture of how well NewSchools' initiatives serve neurodiverse populations. It would also help identify gaps and improvement areas, ensuring that all individuals, regardless of their neurological differences, have access to equitable educational opportunities.

By addressing these key focus areas and enhancing their standard processes, NewSchools can significantly improve the effectiveness and comprehensiveness of its impact assessments. This will enable the organization to better understand its ventures' long-term sustainability and growth potential, evaluate the impact on diverse learner populations, and ensure that its initiatives are inclusive and equitable.

## **Part IX: Assumptions, Evidence, & Rationale**

### **Overview**

NewSchools' initiative to enhance assessment methodologies, particularly for the learning differences (LD) portfolio, focuses on redefining and refining what and how data is currently collected. The goal is to identify critical indicators within the existing data that can provide a clearer understanding of the impact of these ventures. NewSchools is exploring ways to optimize the existing impact survey to extract more relevant and detailed information, especially for the LD portfolio. This might involve re-evaluating the survey questions to ensure



they focus sharply on the most critical aspects of learning differences.

Moreover, NewSchools is assessing the potential of analyzing existing data more innovatively and insightfully. This could include employing advanced data analysis techniques to uncover deeper trends and correlations that were not previously apparent. The aim is to enhance the quality of insights derived from the data collected rather than increasing the quantity of data gathered.

To align its assessment methodologies with industry standards, NewSchools is focused on designing an improved approach that does not subject ventures to additional surveying. By examining the practices of leading organizations in the sector, such as the Bill & Melinda Gates Foundation's Measures of Effective Teaching (MET) project, the Chan Zuckerberg Initiative, Reach Capital, the EdTech Fund, and Social Venture Partners, NewSchools can integrate best practices and innovative approaches into its framework. This delicate balance involves developing a system that yields deeper insights from existing data collection processes without overburdening ventures with extra data reporting requirements.

In essence, NewSchools is committed to designing a more effective assessment approach that maximizes the value of existing data while minimizing the ventures' assessment burden. This refined approach aims to provide a more comprehensive and nuanced understanding of the impact, particularly in learning differences, thereby enabling more informed decision-making and strategy formulation for NewSchools and the ventures it supports. This aligns with our broader Social Constructivism and Self-Determination Theory theoretical framework, emphasizing the importance of contextual factors and individual agency in educational assessment and strategy development.

## **Assumptions**

NewSchools operates under several key assumptions in this initiative. Firstly, it assumes that the current data collection processes, while effective, can be optimized to yield more profound insights. This involves the belief that by refining survey questions and employing advanced data analysis techniques, NewSchools can uncover valuable trends and correlations that are not visible. Additionally, NewSchools assumes that the best practices from leading organizations can be successfully integrated into their existing framework without disrupting current operations.

## **Evidence**

The evidence supporting these assumptions includes successful examples from leading organizations such as the Bill & Melinda Gates Foundation and the Chan Zuckerberg Initiative, demonstrating the efficacy of advanced data analysis and refined survey methodologies in yielding deeper insights. Furthermore, preliminary internal reviews at NewSchools have indicated that there are indeed gaps in the current data that could be addressed through more focused questions and innovative analytical approaches.

## **Rationale**

The rationale behind this initiative is grounded in the need for more actionable and detailed insights into the impact of NewSchools ventures, particularly those focused on learning differences. By enhancing the data collection and analysis processes, NewSchools aims to understand better and demonstrate its initiatives' effectiveness. This supports continuous improvement and accountability and aligns with NewSchools' commitment to evidence-based decision-making. Moreover, this approach minimizes additional burdens on the ventures, ensuring they can continue their work without being overwhelmed by excessive data reporting

requirements.

NewSchools' refined assessment approach aims to maximize the value of existing data, provide a more comprehensive understanding of impact, and align with industry best practices. This initiative is critical for supporting informed decision-making and strategy formulation, ultimately enhancing the effectiveness and reach of NewSchools' educational initiatives. By leveraging the theoretical frameworks of Social Constructivism and Self-Determination Theory, NewSchools ensures that its strategies are contextually relevant and empower individual agency in academic settings.

### **Stakeholders and Future Considerations**

Within the 28-week project scope, the project's findings will significantly influence NewSchools' internal decision-making processes. Insights gained from analyzing existing surveys and data will inform how resources are allocated, ensuring that financial and capacity-building support is distributed most effectively among ventures. These outcomes will shape the organization's strategic planning by directing efforts to areas of greatest need, ultimately enhancing the overall impact of NewSchools' initiatives.

The refined understanding of the impact that emerges from this project will also influence the venture selection process. By identifying critical indicators of success and areas needing improvement, NewSchools will be better equipped to set criteria for future funding decisions. This ensures that resources are directed toward ventures with the highest potential for meaningful and sustainable impact. Should the project uncover gaps in current metrics and assessment methods, NewSchools may revise these tools to capture more comprehensive insights. This continuous improvement in metrics will lead to a more accurate assessment of venture performance and impact.

Based on the project's insights, NewSchools' communication strategies are poised for transformation. The organization will be able to communicate its impact more effectively to the wider education community, sharing both successes and areas for improvement. This transparent communication fosters trust and encourages collaborative growth among stakeholders. By clearly articulating the outcomes of its initiatives, NewSchools can engage more effectively with funders, partners, and the broader education sector, demonstrating its commitment to continuous improvement and evidence-based practices.

In line with its commitment to equity, the project's insights will be instrumental in addressing disparities in impact among ventures. By identifying and targeting these disparities, NewSchools can contribute to more equitable educational outcomes. This aligns with the organization's overarching goal of fostering an inclusive and effective education landscape. The strategic approach ensures that all students have access to high-quality educational opportunities regardless of their backgrounds or learning differences.

This project will serve the immediate stakeholders and lay the groundwork for future advancements in educational support and innovation. By leveraging the project's findings, NewSchools can make informed decisions that enhance the effectiveness and equity of its programs, ensuring that its resources are used to their fullest potential in creating impactful educational change.

### **Industry Standards**

Aligning NewSchools' assessment methodologies with industry standards is crucial for ensuring best practices and enhancing the impact of their initiatives. By examining the practices of peer organizations, NewSchools can gain valuable insights and integrate effective strategies. For instance, the Bill & Melinda Gates Foundation's Measures of Effective Teaching (MET)

project evaluates teaching effectiveness through comprehensive metrics such as classroom observations, student surveys, and performance assessments. This approach ensures that strategies are effective for all students, including those with learning disabilities, aligning with NewSchools' goals of building fair and reliable systems for measuring teacher effectiveness to benefit students with learning differences.

Other peer institutions also offer valuable approaches. The Chan Zuckerberg Initiative focuses on personalized learning and technology integration to support diverse educational needs. Their data-driven approaches to measuring program effectiveness and technology integration in classrooms provide tailored learning experiences, especially for students with learning differences. Reach Capital invests in adaptive learning technologies, emphasizing personalized learning experiences and improved engagement for students with learning differences, measuring success through adoption rates and improved learning outcomes. The EdTech Fund supports tools that enhance student learning, ensuring effectiveness in diverse settings. Social Venture Partners uses specific measurement frameworks to evaluate educational initiatives for students, including students with learning differences.

To assess initiatives' impact, it is essential to utilize a robust framework of leading and lagging indicators. These indicators, derived from industry standards and the practices of peer institutions, provide a comprehensive measure of both short-term progress and long-term outcomes.

Leading indicators offer early signs of progress and effectiveness, allowing us to make timely program adjustments. We have identified several key metrics based on peer organizations' work. Tracking student engagement, including participation by those with learning differences, is essential as high levels of engagement often correlate with better learning outcomes and program

effectiveness. Measuring initial skill gains, particularly among students with learning differences, helps identify the immediate impact of educational interventions. Collecting teacher feedback on program effectiveness, especially in supporting students with learning differences, is crucial for understanding practical challenges and successes within the classroom setting. Monitoring user adoption rates for new technologies tailored for students with learning differences can indicate the relevance and usability of the provided technological tools. Keeping track of program attendance rates, focusing on students with learning differences, ensures consistent attendance, often a precursor to sustained engagement and improved outcomes.

Lagging indicators measure long-term outcomes and provide a retrospective view of program effectiveness, helping to validate the initial success indicated by leading metrics. Evaluating academic performance through students' grades and test scores, particularly for those with learning differences, provides a direct measure of the scholarly impact of programs. Tracking graduation rates among students, including those with learning differences, is a critical indicator of long-term educational success. Assessing college and career readiness (CCR) for students, especially those with learning differences, determines how prepared they are for post-secondary education and the workforce, serving as a vital measure of the overall effectiveness of educational interventions.

By leveraging these leading and lagging indicators, NewSchools can ensure a balanced and thorough evaluation of their program's impact. Leading indicators allow for early detection of success and areas needing improvement, while lagging indicators confirm the sustained effectiveness of our interventions. This dual approach aligns with industry standards and enhances NewSchools' ability to make data-driven decisions that improve educational outcomes for students with learning differences. Through continuous monitoring and adjustment based on

these indicators, NewSchools can be better equipped to support the diverse needs of its stakeholders and drive long-term educational success.

## **Part X: Recommendations and Conclusions**

### **Recommendations**

The interplay between the research question and the conceptual framework is enriched by incorporating Social Constructivism, Self-Determination Theory (SDT), the ABIOPT Framework, and principles of operational precision from statistical analysis. These frameworks contribute to a nuanced understanding and enhancement of NewSchools' impact assessment methodologies. The following recommendations align with these frameworks to ensure comprehensive and effective strategies:

First, benchmarking best practices is crucial. Learning about industry standards from peer organizations, such as the Bill & Melinda Gates Foundation, the Chan Zuckerberg Initiative, Reach Capital, the EdTech Fund, and Social Venture Partners, helps determine key metrics and best practices. These organizations use leading indicators like student engagement, initial skill gains, teacher feedback, technology adoption rates, and program attendance to provide early signs of progress, allowing for timely adjustments. Additionally, lagging indicators such as academic performance, graduation rates, and college and career readiness validate long-term success. By adopting and adapting these practices, NewSchools ensures its impact measurement remains at the forefront, incorporating proven strategies to enhance social return on investment (Khallaf et al., 2022; Moody et al., 2015). The rationale here is that benchmarking against leaders in the field broadens the impact assessment to include diverse stakeholder perspectives, particularly those of students with learning differences.

Second, it is recommended that NewSchools align metrics to achieve a common vision by continuing to develop its first organization-wide logic model, which all investment team logic models will follow, enhancing operational precision, as highlighted by Kues (2018). Revising existing investment team logic models and venture impact and satisfaction surveys ensures alignment and improves the accuracy of impact assessments. This unified approach enables NewSchools to accurately track and compare outcomes across different teams and ventures, thereby enhancing data-driven decision-making and overall assessment reliability. The rationale for this unified approach is to ensure that NewSchools' evaluations are accurate and relevant, improving the precision of impact assessments and ensuring consistency and clarity in their impact measurement.

Third, school collaboration is recommended to determine LD student impact goals and measures. NewSchools' belief that organizations working directly with the end user can best define success aligns with Social Constructivism (Vygotsky, 1978; John-Steiner & Mahn, 1996). Leveraging collective educational wisdom refines NewSchools' strategies and fosters collaborative learning. By working closely with schools, NewSchools ensures that measures of success are grounded in the real-world experiences and needs of students and educators. This collaboration aligns with Social Constructivism, emphasizing the importance of social context and interaction in learning and development. The rationale is that collaborating with schools helps ensure that the measures of success are grounded in real-world experiences, making them more relevant and effective.

Fourth, assessing past ventures through surveys and interviews helps identify areas for improved impact measurement. This aligns with the sustainability framework outlined by Schell et al. (2013), which emphasizes environmental support, funding stability, and organizational



capacity. Finding proxies for efficacy beyond self-efficacy ensures comprehensive and fair assessments. By evaluating past ventures, NewSchools can gain insights into successful strategies and areas needing improvement, ensuring long-term viability and a nuanced understanding of impact. The rationale is that adapting evaluation processes to be inclusive and mindful of motivational dynamics ensures comprehensive and fair assessments, leading to continuous improvement and long-term success.

Fifth, focusing on LD funding in schools within the Innovative Public Schools investment area, alongside Black and Latino students, ensures consistent data collection and standardized analytics. This targeted focus, aligned with Social Constructivism, SDT, and organizational design theories, advocates for a responsive and personalized educational environment. Consistent data collection allows for more effective analysis and strategy development, ensuring resources are allocated to the most significant impact areas. The rationale is that this targeted focus advocates for a responsive, personalized educational environment aligned with learner diversity and organizational strategy.

Sixth, enhancing the communication strategy to focus on philanthropy rather than venture funding can aggregate data to show NewSchools' overall impact. This shift promotes visibility and transparency, aligning with NewSchools' mission to support diverse learning communities. A philanthropy-focused strategy can attract more donors and supporters while aggregated data effectively communicates the impact of NewSchools' initiatives, building a stronger case for ongoing and increased support. Enhancing visibility and transparency promotes continuous growth and aligns with NewSchools' mission, attracting more support and ensuring the sustainability and expansion of successful programs.

Seventh, using open-ended questions internally as an in-house learning tool, without

using them as formal metrics, provides valuable qualitative data. These anecdotal insights foster a continuous improvement and learning culture within NewSchools, offering deep insights and innovative ideas that structured surveys might miss. The rationale is that these anecdotal insights provide valuable qualitative data for internal learning without complicating formal metrics, fostering a culture of continuous improvement within NewSchools.

Lastly, combining qualitative and quantitative data is essential for providing a comprehensive view of program effectiveness and areas for improvement. This mixed-methods approach ensures a balanced and thorough evaluation, capturing measurable outcomes and nuanced insights that numbers alone cannot provide. Metrics differ according to goals and available data, and integrating both data types allows NewSchools to achieve a holistic understanding of its impact. The rationale is that combining qualitative and quantitative data ensures a balanced and thorough evaluation, capturing a complete picture of the impact and supporting continuous improvement.

By implementing these recommendations, NewSchools can ensure its assessment methodologies are comprehensive, precise, and aligned with industry best practices, ultimately enhancing the support for diverse learning communities.

## **Conclusion**

This project design represents a comprehensive and strategic effort for NewSchools to refine and enhance its approach to supporting educational initiatives for students with learning differences. By meticulously integrating Social Constructivism, Self-Determination Theory, the ABIOPT Framework, and principles of operational precision into the evaluation process, we emphasize the significance of social context, individual agency, inclusivity, and statistical rigor in educational outcomes. This theoretical grounding ensures that strategies are effective and

equitable, addressing the unique needs of students with learning differences.

Methods, which include detailed interviews with key organizational leaders, rigorous benchmarking, and evidence-based validation, are designed to capture a holistic view of the effectiveness of NewSchools' initiatives. These methodologies are informed by a robust theoretical framework that values precision, stakeholder engagement, and social impact, as reflected in our integration of concepts from statistical analysis, public-private partnerships, and social return on investment.

Our strategic approach goes beyond mere assessment to actively enhance the educational practices within NewSchools-funded ventures. By identifying and addressing gaps in NewSchools' current strategies and metrics, we aim to foster a more impactful and inclusive educational environment. This initiative aligns with NewSchools' mission to support diverse learning communities and sets a precedent for how educational assessments can be conducted with a focus on continuous improvement and stakeholder involvement.

The insights gained through this project will play a crucial role in shaping NewSchools' internal strategies and decision-making processes. The project's findings are expected to influence resource allocation, ensuring that support is effectively distributed to maximize educational outcomes. Additionally, by fostering a data-driven and introspective culture within NewSchools, capabilities are enhanced to communicate the effectiveness and areas for improvement of educational strategies to a broader audience, promoting transparency and continuous growth.

Ultimately, this project is about setting a path for future educational support and innovation advancements. By ensuring that strategies are responsive to the evolving landscape of academic needs and methodologies, NewSchools is committed to reducing educational

disparities and providing all students, especially those with learning differences, equitable access to quality education. This strategic approach serves the immediate needs of stakeholders and lays the groundwork for long-term enhancements in the support and development of diverse learning communities.

By addressing the research question—how NewSchools’ current impact metrics and measurement approaches align with industry standards and how they can be improved—this project integrates key theoretical frameworks to ensure that NewSchools’ assessments are data-driven, precise, equitable, and reflective of the diverse needs of students with learning differences. The project’s findings will enable NewSchools to refine its impact assessment strategies, ensuring they are both practical and aligned with best practices in the industry.

### **Future Considerations and Path Forward**

As NewSchools moves forward with the implementation of these recommendations, several future considerations should guide the path:

1. **Continuous Improvement:** Establish a regular review cycle for impact assessment methodologies to incorporate new research findings, technological advancements, and evolving best practices in the field of education for students with learning differences.
2. **Stakeholder Engagement:** Maintain active engagement with a broad range of stakeholders, including educators, students, parents, and industry experts, to ensure that the assessment strategies remain relevant and effective in addressing the needs of diverse learning communities.
3. **Scalability and Flexibility:** Design assessment tools and frameworks that are scalable and flexible to accommodate the varying needs of different ventures and educational contexts, ensuring that NewSchools can adapt to new challenges and opportunities as they arise.

4. **Capacity Building:** Invest in capacity-building initiatives for venture teams to enhance their ability to effectively collect, analyze, and utilize impact data. This includes training and resources to ensure all stakeholders can engage meaningfully with the assessment processes.
5. **Innovation and Research:** Encourage ongoing innovation and research within NewSchools and its ventures to explore new methods and tools for impact assessment. This can help identify emerging trends and areas for further development, keeping NewSchools at the forefront of educational support and innovation.
6. **Long-Term Monitoring:** Implement long-term monitoring and follow-up studies to track the sustained impact of NewSchools' initiatives on students with learning differences. This will provide valuable insights into the long-term effectiveness and areas for improvement, ensuring that the benefits of NewSchools' interventions are lasting and transformative.

By considering these future directions, NewSchools can ensure that its impact assessment strategies continue to evolve and improve, ultimately contributing to a more inclusive, effective, and equitable education system for all students.

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