EF+Math Program

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Facilitated Team Development Process Overview

Description

This resource is provided as an example of the Establishing Foundations Key Action: "Build interdisciplinary teams that bridge research, practice, development, and community expertise."

This document provides an overview of EF+Math's process for Facilitated Team Development. A primary goal of the EF+Math Program was to design and develop teacher- and student-centered effective math learning prototypes. The EF+Math team was intentional in how they selected these teams through the RFP process, and also in how they supported these selected teams, via shared learning, mentorship, and community connection opportunities. The Facilitated Team Development process was an optional part of EF+Math's inclusive Request for Proposals process, conducted between August 2019 and June 2020. The Facilitated Team Development process consisted of a series of virtual meetings and one in person event designed to support individuals in coming together to form interdisciplinary R&D teams of educators, researchers, and developers and generate ideas that could become strong proposals.

See below to read how the EF+Math program Facilitated Team Development Process supported the formation of interdisciplinary teams in alignment with Inclusive R&D principles and practices.

EF+MATH

Facilitated Team Development Process Overview

Revised 5/2022

Introduction

As the flagship program for AERDF, the EF+Math Program was a demonstration program designed to model core aspects of *Inclusive R&D*: where educators, researchers, and developers/engineers work together to create useful and usable, effective and equitable practices and tools for classrooms. A primary goal of the EF+Math Program is to design and develop teacher- and student-centered learning systems that result in significantly improved executive function (EF) skills and math outcomes for Black and Latinx students, and students experiencing poverty in grades 3-8.

Between August 2019 and June 2020, EF+Math conducted an ***inclusive Request for Proposals*** process to identify and select the innovative and multidisciplinary R&D teams who proposed to design and develop learning systems that met the following minimum criteria:

1. Designed and implemented for one or more grades in the middle years (grades 3-8) for students in historically under-resourced schools.
2. Designed to build EF skills during math learning.
3. Designed to build conceptual understanding of math and multi-step problem solving skills in math.
4. Student privacy rigorously designed and protected from the beginning (i.e., 'Privacy by Design').
5. Designed with equity at the center (i.e., 'Equity by Design').
6. Designed to be effective across multiple contexts (i.e., designed for scale).
7. Designed to fit within the typical school structure (i.e., integrate into established structures or routines).
8. Able to test hypotheses about which EF domains are most important for which aspects of math learning.

The request for proposals process included three key components, each of which was intentionally designed be inclusive:

- **Call for Proposals:** EF+Math's Call for Proposals was a two stage process where proposers submitted short concept notes and then a subset were invited to submit full proposals. EF+Math held two webinars, office hours, and posted FAQs to their website to ensure all potential proposers had access to the same information.
- **Facilitated Team Development (FTD):** Prior to the concept note due date, individual researchers and developers were invited to participate in an optional process to help them identify team members to form new collaborations.
- **Inclusive Review & Diligence Process:** EF+Math recruited a multidisciplinary team of ~40 reviewers with expertise in EF research, product development, evaluation, math research, and learning analytics, and teaching/education. Twice as many educators were represented in the reviewer cohort than researchers or designers/developers combined. Proposals were rated on a variety of factors including district interest, responsiveness to feedback, design for equity, potential for impact, appropriateness of student assessments, strength of proposed co-design process, management plan, cost realism, and overall portfolio fit. Reviewer feedback was provided to proposers at each stage of the process, and representatives from each of the core areas were at the decision-making table and held equal voice in the decision-making process.

This document provides a deep-dive into the FTD process: why and how it was designed, what activities it included, and the impact it had on EF+Math proposals and funded projects.

Why Facilitated Team Development (FTD)?

EF+Math designed the FTD process to serve two main purposes:

(1) **To challenge the status quo of traditional philanthropy** and identify scholars and developers who may not be traditionally funded in the federal or private philanthropy world. Instead of pursuing and funding the same familiar (and majority white) faces, EF+Math wanted to recruit Black and Latinx leaders with deep technical and domain expertise in mathematics and equity who may not be well known in education funding circles.

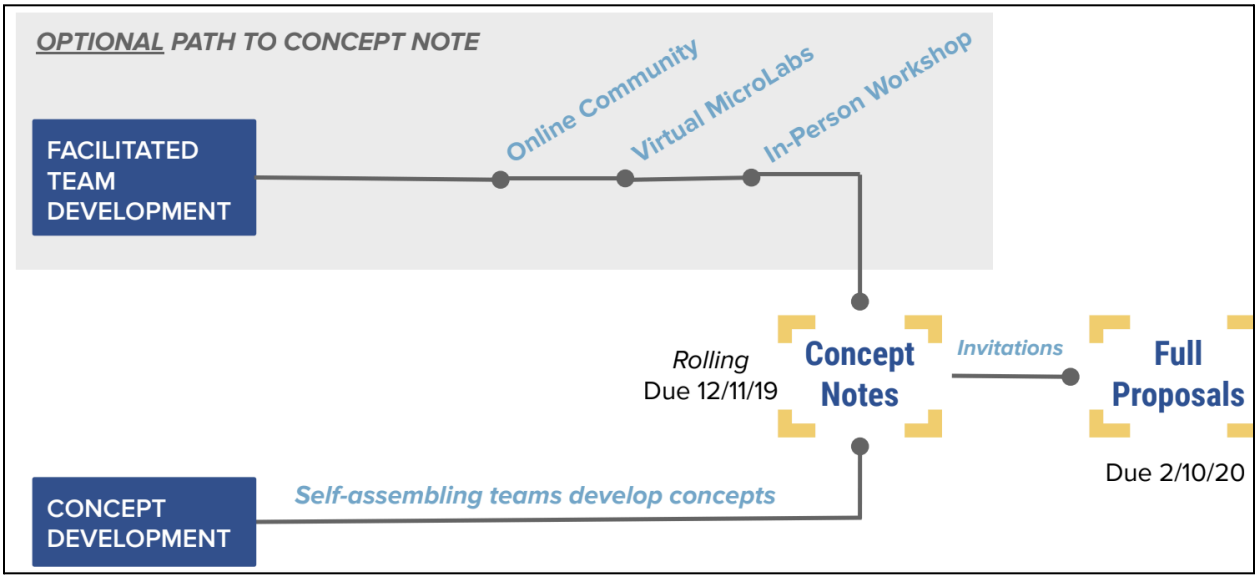
(2) **To support the formation of cross-disciplinary teams with bold ideas** for integrating executive function-building activities into high-quality, evidence-based math instruction with a strong focus on centering educators and designing for equity. Successful teams included researchers, engineers, and educators.

Facilitated Team Development (FTD) Process Overview

To meet the above two objectives, the FTP process included three major activities that allowed participants to generate concepts and build teams, for application to be a 'prototyping R&D team' for EF+Math. We outline those major activities below, but first note that the FTD process

was one of two ways the EF+Math program enabled teams to apply for their Prototyping Track (*see diagram below*). Self-assembling teams with previously developed partnerships and concepts were given the option to go straight to the concept note stage. Applicants who were in need of additional resources and connections were invited to apply to participate in FTD. The three main activities that FTD participants engaged in were (1) being connected to an online community; (2) participating in a series of 'microlabs'; and (3) an in-person three day workshop.

EF+Math received 58 applications to participate in FTD. Reviewers of the applications received bias training, and the scoring rubric for applications was used to identify candidates along three primary criteria: research domain expertise (balanced across different domains, like learning science, cognitive science, assessment design, evaluation, and equity), potential for collaboration, and experience in designing for equity. EF+Math invited 49 applicants to join FTD (84% of applicants).



FTD participants were invited to engage in a series of virtual meetings and an in-person convening to collaboratively explore and develop ideas to address EF+Math's core challenge: ***How might we support all students in under-resourced schools in becoming powerful math learners with strong executive function skills?*** EF+Math provided direct support to FTD participants through three distinct opportunities: an online community, a series of MicroLabs, and an in-person workshop event in Chicago. Throughout the process, participants had access to mentors and EF+Math Educator Leadership Council (ELC) members. The roles of mentors and ELC members are described further below.

Resource 1: Online Community

The first support opportunity for FTD participants was an online community where participants could connect asynchronously and access a compilation of resources on EF, math, and equity,

and their intersections to help inform the progression of their ideas. Similar to a social media site or forum, the online community was a low-stakes, low-lift way for people to engage each other and make connections early.

Resource 2: MicroLabs

Additionally, participants were also invited to engage in a series of three virtual sessions (called 'MicroLabs') held in October through early November 2019. For each of three MicroLabs, participants met on Zoom with the EF+Math team and an external consultancy group - Knowinnovation - brought on to co-facilitate. The goal was to provide a group setting for participants to unpack the challenge, explore those challenges through use cases, and generate aspirational challenges and potential ideas. The MicroLab activities were designed to feed directly into the subsequent in-person event; the challenges they identified and the ideas they generated to solve those challenges could be taken with them to workshop and flesh out further in Chicago. The MicroLabs also provided an opportunity for folks to network synchronously, even if they couldn't join the in-person event. In the first MicroLab, participants started to unpack the core challenge: *How might we support all students in under-resourced schools in becoming powerful math learners with strong executive function skills?* In the second MicroLab, participants explored use cases related to the challenge and identified key obstacles. In the third MicroLab, participants generated aspirational challenges and potential ideas, setting them up for the in-person event.

Resource 3: In-Person Workshop

Following the three virtual Micro-Labs, FTD participants were invited to participate in an in-person, interactive convening designed to support teams of individual participants in coming together to generate ideas that could be turned into concepts notes. Travel stipends were provided as an optional resource to the applicants to ensure equitable access to participation in the event. 80 people attended the event, including 36 participants, 6 mentors, 21 Educator Leadership Council members, and the EF+Math Program team.

Throughout the three day event, racial equity and social justice was intentionally centered in the conversation, with leadership and facilitation support from EF+Math mentors with equity expertise. To ground the conversation in equity and frame its critical importance for EF+Math's work, the EF+Math team, ELC members, and additional equity advisors spent significant time at the beginning of the first day framing the historical context and current realities of race in

education and introducing the important role of the ELC. Participants were introduced to the Designing For Equity framework on the first day and over the course of the three days, pauses to check for equity were built into the agenda. ELC members and Mentors gave opening and closing remarks each day, ensuring that an equity mindset and educator perspective was established for that day's activities as well as the following day's.

Over the course of the event, participants were ushered through small group brainstorming sessions focused on math learning challenges and aspirational solutions for addressing those challenges. They were prompted to mingle with new people at each transition, casting a wide net to hopefully connect with someone aligned with their idea and with complementary expertise. A colorful gallery of post its on the walls were used to capture a-ha moments and "wouldn't it be great if's." Rounds of "speed dating" brought people face to face, pitching their ideas and forming even deeper connections. When a group clicked and got excited about an idea, an ELC member would join and help them refine and scope their idea. Teams had working time to develop their proposals, with input from mentors and ELC members, and presented their ideas on Day 2 and Day 3. They received feedback from mentors and the EF+Math team that they could use to refine even further in preparation for submitting a concept note in response to the RFP.

Role of Mentors & Educator Leadership Council (ELC)

Two groups - ELC members and mentors - provided critical guidance to both the EF+Math Program Team and FTD participants throughout the process, working alongside EF+Math to design the process, facilitate the activities, and provide thought partnership to the participants. The EF+Math ELC is composed of diverse educators with expertise in middle-year (grades 3-8) math curriculum and instruction and deep experiences working in districts that serve Black and Latinx students and students of all races experiencing poverty. An initial cohort of ELC members was established at the very start of the EF+Math Program prior to development and launch of EF+Math's first RFP. Throughout the FTD process, ELC members provided participants with a deeper understanding of real-world challenges, helped them brainstorm solutions that might address their students' needs, and continuously grounded the conversation in equity. In addition to ELC members, mentors supported participants throughout the FTD process, bringing expertise in the fields of inclusive research and development, EF, math instruction, and racial equity.

Impact & Outcomes

The primary goal for the FTD process was to provide support for potential proposers to identify teammates and write strong proposals. Towards this goal, of 49 FTD participants, 36 (73%) submitted a concept note (either as a lead proposer or a contributor), with 11 participants submitting as a lead proposer and 26 submitting as a contributor (some submitted multiple proposals). Proposals submitted by FTD attendees made up 30% of the total number of 63 concept notes received and were ranked higher overall by technical reviewers and the ELC

making them more likely to be invited to submit full proposals than teams who did not attend FTD. 63% (12 of 19) of FTD concept notes were invited to submit full proposals while only 30% (12 of 43) of non-FTD concept notes were invited to submit full proposals. Four of the seven PIs selected to receive an award through the Prototyping Track participated in the FTD process. Additionally, two of the four PIs awarded through the Applied Research Track participated in the FTD process. Racial demographics were similar across FTD and non-FTD teams who concept notes. 26% of FTD leads identified as a person of color and 28% of non-FTD leads identified as a person of color.

The secondary goal for the FTD process was to support applicants in centering educators and designing for equity in their bold new approaches for integrating executive function-building activities into high-quality, evidence-based math instruction with a focus on. The Educator Leadership Council played a critical role in the FTD process, specifically in centering educators and encouraging teams to design for equity. ELC members impacted the proposals by speaking on equity to the whole group throughout the whole event, by offering ideas and solutions during the co-design process, by embedding with R&D teams through the process, and by meeting individually with teams to offer feedback as ideas turned into the backbone for Concept Notes. EF+Math surveyed the Council after the FTD workshop and 89% of Council members felt they impacted the proposals created by R&D teams. One FTD participant reflects, “I think the ELC is one of my favorite things about this process. I appreciate the clear focus on equity and the valuable insights they bring about what these processes look like in a classroom.” The intentional centering of educator voice and equity during the FTD process likely influenced the extent to which proposed approaches were designed for equity. Concept notes that were submitted by FTD participants scored 0.55 points higher on “Designing for Equity” than other proposals on a 5-point scale.

The impact of the in-person event was felt by almost all of the participants who responded to the post-event survey. Participants felt the most value add from the deep commitment to equity, the connections to Mentors and ELC members, and the speed dating-style of networking. One anonymous respondent wrote, “The talks by all the speakers were all amazing. Their personal experiences and passion for equity and diversity were inspiring and encouraging . . . This awakening will help me work equity and diversity more closely and intentionally into my professional and personal life.”

Conclusion

Overall, the FTD process substantially influenced the proposals submitted in response to the EF+Math Call for Proposals. While there was no difference in diversity of teams who submitted proposals through the FTD path versus the self-assembling path, both the overall quality of proposals and extent to which they were designed for equity was higher for teams that participated in FTD. More broadly, the FTD process provided a critical opportunity for the EF+Math Program to communicate its deep commitment to equity, beyond what might typically

be required from more established and traditional funders, and to establish the central role of the ELC. This significantly accelerated the program's ability to establish a strong foundational commitment to equity and to center educator voices across the awardee community, the effects of which are beginning to show up in the math learning approaches being developed by EF+Math awardees.