Developing a coherent research agenda
Lessons from the REL Northeast & Islands Research Agenda Workshops

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Summary

Since 2012 the 10 regional educational laboratories (RELs) have built and supported research alliances on topics important to states and local school districts. Research alliances are sustained collaborations among researchers, administrators, policymakers, and practitioners. The broad goal of research alliances is to increase state and local capacity to use data and research to inform decisionmaking in a designated education priority area.

A key task for each research alliance is to establish a set of research questions—a research agenda—to guide its work over several years. Setting a research agenda is not an easy task in almost any circumstance. It requires assessing what is known about a problem, identifying the important unanswered questions, and weighing opportunities and constraints, including the availability of data, willing research partners, and funding. For research alliances, setting a research agenda also can require technical assistance in developing researchable questions and negotiating competing interests among the states and districts represented at the table.

This report describes the approach that REL Northeast and Islands (REL-NEI) used to guide its eight research alliances toward collaboratively identifying and agreeing on a shared research agenda. A key feature of REL-NEI's approach was a series of two workshops for each alliance. The workshops helped groups of individuals with varying backgrounds establish an agreed set of questions to guide research with implications for education policy and practice.

This report explains how REL-NEI conceptualized and organized the workshops, planned the logistics, accommodated geographic distance among alliance members, developed and used materials (including modifications for different audiences and for a virtual platform), and created a formal research agenda after the workshops. Materials used for the workshops, including facilitator and participant guides to the workshop and workshop slide decks, will be available for download from the Tools & Resources section of the REL-NEI website (www.relnei.org/tools-resources.html) or by contacting REL-NEI at relneiinfo@edc.org.

The intended audience for this report is other groups of researchers, practitioners, and policymakers who want to work in a sustained partnership on research questions that arise from education practice. Although there is no single way to develop and nurture a strong, productive research alliance, the lessons from the experience of the RELs may spark new ideas and help others avoid pitfalls. The workshop materials developed along with this report are customizable to the needs of other alliances.

Contents

Since 2012 the 10 regional educational laboratories (RELs) have built and supported research alliances on topics important to states and local school districts. Research alliances are sustained collaborations among researchers, administrators, policymakers, and practitioners. The broad goal of research alliances is to increase state and local capacity to use data and research to inform decisionmaking in a designated education priority area.

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This report provides an introduction and links to the workshop materials, which are available for adaptation and use. The report has eight sections:
- Research alliances: How are they organized, and who participates?
- What is the purpose of Research Agenda Workshops?
- Using the workshop agenda and materials to engage, instruct, and prioritize.
- Planning and leading a virtual Research Agenda Workshop.
- Example: One alliance's experience with the workshop.
- After the workshop: Toward a final alliance research agenda and work plan.
- Successes.
- Remaining challenges.

Research alliances: How are they organized, and who participates?

REL-NEI established eight research alliances focused on four education-related topics identified as regional priorities through a needs-assessment process. Table 1 lists the topics, the research alliances aligned with each topic, whether state and district staff participate, and the jurisdictions they serve.

The REL-NEI research alliances are structured with three levels of membership, each requiring a different level of commitment: the core planning group, participating members, and interested stakeholders.

- *Core planning group:* During the first year of working with the alliances, REL-NEI focused on recruiting and developing a core planning group (CPG) for each alliance. The CPG governs the alliance, setting priorities and guiding the agenda and project development. Each alliance has 10–15 CPG members who meet regularly, advise on projects, and generate ideas for alliance events. CPG members were asked to commit at least a year to this role.

Table 1. The eight Regional Educational Laboratory Northeast & Islands research alliances in 2012—a closer look

Topic and alliance	Member composition			Jurisdictions served								
	State education agency	Local education agency	Other[a]	Connecticut	Maine	Massachusetts	New Hampshire	New York	Puerto Rico	Rhode Island	Virgin Islands	Vermont
Topic 1: Identifying and retaining effective teachers and principals												
Northeast Educator Effectiveness Research Alliance	✔	✔	✔	✔	✔	✔	✔	✔		✔		✔
Topic 2: Improving low-performing schools and districts												
Northeast Rural Districts Research Alliance		✔	✔		✔			✔				✔
Urban Schools Improvement Alliance		✔		✔	✔	✔		✔		✔		
Topic 3: Ensuring educational equity and supporting special populations												
Early Childhood Education Research Alliance	✔		✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
English Language Learners Alliance	✔		✔	✔	✔	✔		✔		✔		
Topic 4: Increasing college and career readiness, access, and completion												
College and Career Readiness Research Alliance	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
Puerto Rico Research Alliance for Dropout Prevention	✔		✔						✔			
Virgin Islands College and Career Readiness Research Alliance	✔										✔	

a. Includes institutions of higher education, education service agencies, other state departments, and the like.

Source: Authors.

Figure 1. Regional Educational Laboratory Northeast & Islands alliance structure
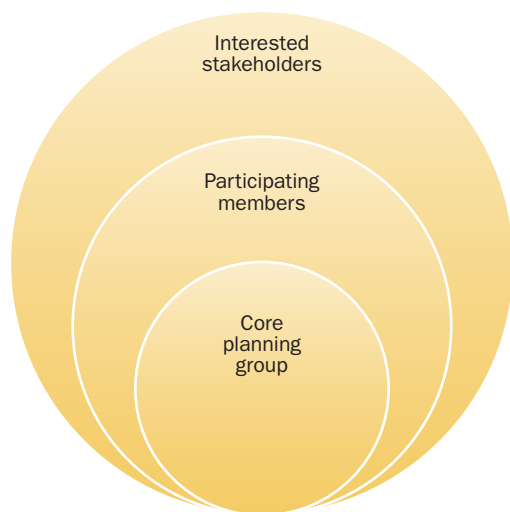
- *Participating members:* After REL-NEI had identified members of the CPG, it began to recruit participating members in the alliances. Participating members are peers or near-peers of the CPG members. For example, the Urban School Improvement Alliance CPG comprises research directors for medium-size urban districts, and participating members were recruited from the research staff at other medium-size urban districts in the region; other staff in these districts whose responsibilities may include research, assessment, or evaluation; and state staff involved in research, data analysis, and related activities. Participating members attend alliance convenings, workshops, and events. They also may participate as partners or advisors on projects and studies that come from the alliance research agenda.

- *Interested stakeholders:* The final layer of membership for each alliance is interested stakeholders, which include peers from outside the region, researchers focused on the alliance topic, and a national audience of stakeholders. Interested stakeholders are included in all dissemination efforts and events.

Each REL-NEI alliance also has a facilitator and at least one researcher, who together make up the alliance team. The alliance team members are specialists in the alliance content area. The facilitators, with extensive experience providing technical assistance to states and districts and facilitating conversations with education leaders at multiple levels, are skilled at synthesizing group discussions, moving discussions forward, and understanding education practitioner needs. The alliance researchers hold doctoral degrees, bringing a broad understanding of research methods and design to the alliance. They draw on this expertise during the Research Agenda Workshops—to lead the discussion of research types and designs, take extensive notes, and help alliance members synthesize their research topics and questions during the workshop brainstorming sessions.

The alliance facilitators and researchers are REL-NEI staff members who have dedicated time to work on the design and implementation of activities that nurture the relationships within each alliance. These activities include convenings, meeting materials that inform discussion, shared online space for alliance members, recruitment of new members, one-on-one discussions with CPG members, and large virtual and face-to-face events with expert speakers and researchers that address alliance interests.

What is the purpose of Research Agenda Workshops?

REL-NEI designed the Research Agenda Workshops to engage the 10–15 members of the CPG of each research alliance in a collaborative process for identifying shared research questions that will form a research agenda for three to five years. Since the CPG members set the direction of each alliance, it made sense to limit participation in the workshops to this leadership group.

Clarifying the relationships among research questions, research design, data availability, and study feasibility

A foundational assumption of research alliances is that education practitioners and policymakers identify "problems of practice" in the course of their work and that these problems can form the basis of a research agenda. However, many practitioners, immersed in the complex challenges of their daily work, struggle to formulate researchable questions to

inform the problems they face. Sometimes, they do not understand how research questions are related to the methodology. Other times, they struggle to break down overarching interests or goals into a set of related projects and studies that might make up a research agenda. This is where the skills of researchers become critical to the process.

To help CPG alliance members understand the relationships among research questions, research design, data availability, and study feasibility, REL-NEI designed the Research Agenda Workshop to focus on identifying strong research questions and establishing a research agenda. These workshops are intended to build these alliance members' research capacity and to structure and scaffold the process of engaging alliance members in developing a coherent research agenda that guides their work with REL-NEI.

The workshops were also developed as a low-risk activity for building relationships among CPG alliance members and between alliance members and REL-NEI staff. The workshop activities and format were created to prompt participants to express the education-related priorities and values that guide them and the work of their organizations. As participants clarify and advocate for their research interests, they develop shared understandings of each person's role in the alliance and identify shared beliefs about education. By the workshop's end, the research agenda should reflect these shared values and become part of the identity of the alliance as it grows beyond its founding members.

Tailoring Research Agenda Workshop logistics to alliance member needs

The Research Agenda Workshop was designed as two half-day sessions conducted either in person or online. For scheduling reasons, however, some alliances needed to hold the workshop in a single, day-long session.

In the first session, the workshop usually addressed content related to research, research agendas, and prioritization of topics. The alliances that did the workshop in two sessions had participants individually develop research questions as "homework" to complete after the first session. When the alliance reconvened in the second session, the questions that participants developed were refined in groups. Alliances that met for a single-day session had participants develop their research questions individually or in small groups.

Regardless of whether the workshop was held in a one-day or a two-session format, it was challenging to devote enough time to fully present the content and engage in the prioritization processes while also balancing the busy schedules of CPG members. Some alliances found it difficult to devote a full five or six hours to the workshop. However, when the workshop was shortened, alliance leaders found that the groups were less likely to make it to prioritizing questions. Participants needed time to work through the processes of focusing on the types of research they might want to do; identifying and prioritizing research topics; and developing, refining, and prioritizing research questions.

Two other format issues were considered by alliances in planning the workshops: whether to build the workshop into part of another meeting or to make it the standalone focus of the alliance's meeting and whether to conduct the workshop in person or as a webinar. Alliances that built the workshop into another meeting found it important to ensure a clear transition between segments of the meeting. One of the benefits of a face-to-face meeting is that participants were extracted from their regular day and could focus exclusively on

To help core planning group alliance members understand the relationships among research questions, research design, data availability, and study feasibility, REL-NEI designed the Research Agenda Workshop to focus on identifying strong research questions and establishing a research agenda

the workshop and its agenda. However, scheduling a time for alliance members to meet in person for a full day was difficult.

When deciding between the in-person or webinar format, the alliances' group cohesion and familiarity were also considered. Webinars can work well if the participants know each other or have met virtually or in person. For example, the Northeast Rural Districts Research Alliance includes practitioners and researchers who had little interaction before the alliance was formed. Therefore, alliance members felt it worthwhile to travel across the region for a full-day, face-to-face workshop. Knowing whether participants were likely to speak up and engage in conversation over the phone was another important consideration, as was whether the participants were likely to become distracted. Another consideration was whether participants would have the computer and Internet connections needed to participate in a webinar.

Using the workshop agenda and materials to engage, instruct, and prioritize

A core agenda and set of materials was developed to ensure that the CPG of each alliance had some common information and content and to maintain a consistent process across the alliances for achieving the workshop goals. Some of the materials and the agenda were then customized to suit the audience's experience and background and the logistics were tailored as well. The core set of materials, including facilitator and participant guides and slide deck, will be available for download from the Tools & Resources section of the REL-NEI website (www.relnei.org/tools-resources.html) or by contacting REL-NEI at relneiinfo@edc.org. The workshop toolkit can be downloaded and adapted for use in other settings. The workshop elements that were maintained across alliances are discussed below, as is how the materials were tailored to fit participant backgrounds and interests.

The core agenda

The core agenda included 12 segments:
- Welcome and purpose.
- Reviewing alliance goal and identifying possible research topics.
- Reviewing types of research and evidence.
- Investigating research examples.
- Reviewing the properties of research questions and agendas.
- Prioritizing research topics.
- Generating research questions.
- Sharing research questions generated.
- Refining questions.
- Prioritizing research questions.
- Building the research agenda.
- Closing and next steps.

Elements in common

Some elements of the agenda and materials were standard across every workshop. These elements were:
- Prework to be completed in preparation for the workshop.
- An overview of REL work and an explanation of the workshop's purpose.

When deciding between the in-person or webinar format, the alliances' group cohesion and familiarity were also considered

- A emphasis on the alliance goal and on individual and group brainstorming of possible research topics.
- Group prioritization of possible research topics.
- A review of various types of research and levels of evidence.
- An overview of the properties of research questions and research agendas.
- Individual and group exercises for generating research questions and refining them.
- Group discussion of priority research questions.

While these elements were common across the workshops, the way each element was addressed differed by alliance. A workshop planning team developed the core materials and worked with alliance teams to customize them to each alliance context. In customizing the workshops, it was important that workshop planners—who then trained the alliance teams to conduct the workshops—consider participants' backgrounds, experiences, and current positions.

The knowledge and relationships that alliance facilitators and researchers had developed with their alliance membership helped in tailoring each workshop. An alliance facilitator or researcher, for example, could inform the workshop planners that its CPG had members who know about research design and who thus do not need a primer on research methods. Although every workshop explored types of research and levels of evidence, the amount of time and depth varied by alliance members' needs. For example, the Urban School Improvement Alliance CPG consists of sophisticated users and producers of research and data analysis. As a result, their workshop did not include a mini-lecture on types of research and levels of evidence. Instead, the facilitator and researchers led a discussion of the CPG members' experiences with varying types of research.

The knowledge and relationships that alliance facilitators and researchers had developed with their alliance membership helped in tailoring each workshop

The timeframes in which alliance members prioritized research questions developed in the workshop were also customized. In each alliance, participants voted on prioritizing questions. Participants received a set number of votes that they could distribute across the questions to prioritize them. Some alliances were comfortable with having participants prioritize questions during the workshop, immediately after question generation and refinement. However, other alliances wanted the opportunity to confer with colleagues or supervisors at their home agencies or to have some time to reflect before voting.

The content of the prework assignment, which was intended to get participants thinking about research design, research methods, types of research, types of data, research questions, and how questions and available data inform design, was also customized for each alliance. Links were provided to examples of different types of research studies—from descriptive studies to randomized controlled trials—and participants were asked to read one of the study summaries before the workshop.

The research examples that workshop planners provided for each workshop differed by alliance topic. While the focus of the prework assignment was to get participants thinking about research methods, participants would be more engaged if they read examples from topics related to their interests. Thus the College and Career Readiness Research Alliance received examples of research on graduation rates, while the English Language Learners Alliance received studies on the mobility of English language learner students.

As a result of these customizations, the facilitator and participant guides and the slide deck were slightly different for each alliance.

Planning and leading a virtual Research Agenda Workshop

As noted, the workshops were designed to be conducted in person or as a webinar. The workshop materials prepared to accompany this report are tailored to an in-person session since many researcher-practitioner alliances will not experience the same geographic challenges and travel constraints as the REL-NEI alliances. However, some traditional face-to-face workshop facilitation techniques were adapted to a webinar and are discussed below for users to consider if they plan to conduct the workshop in a virtual environment. Overall, the workshop design strived to maintain the engagement of participants in the webinar format, even when they could not move physically into small groups or join in other activities that help maintain engagement in an in-person meeting. Three workshop processes were modified for webinar format: small-group discussions, whole-group discussions, and prioritization activities.

The groups worked well when there were clear directions about the group task, when the groups were not too large, and when a facilitator and note-taker were identified

Small-group discussions

The workshop design used small-group breakout sessions to provide all participants with opportunities to share ideas and opinions. Discussion notes from the work done in these small groups were then shared in the large group. This work included identifying possible research topics and examining research examples. Therefore, the webinar platform (Adobe® Connect™) also had to facilitate virtual breakout groups. The groups worked well when there were clear directions about the group task, when the groups were not too large, and when a facilitator and note-taker were identified.

The workshop facilitator had to know in advance who would be in which small groups so that the process of electronically moving into the breakout rooms would not confuse the participants. Figure 2 shows what webinar breakout sessions might look like. The breakout group in the figure is prioritizing topics and research questions within them. The group consists of four CPG members and a facilitator. Three other small groups are holding similar discussions simultaneously, with the same visual format. While in small groups, participants would see only the input from their group on the screen. Once the breakout groups are reunited into the full group, the input from each breakout group would be displayed for a full group discussion.

Whole-group discussions

Webinars, like in-person workshops, work better when they are interactive and participants are engaged. Facilitated discussions were used in the webinar workshops to engage participants in thinking about and sharing their ideas on research topics and questions. Workshop facilitators used the "whiteboards" in the webinar platform to take notes, as shown in Figure 2. All participants could see these notes. In breakout groups the participants were given access to the whiteboards so that the note-taker could be a participant. In addition to using the whiteboards to record notes and keep everyone focused on the same thing, participants were encouraged to use the Adobe Connect chat function to share ideas and comments. To acclimate participants to the chat function, the workshop facilitators conducted a demonstration welcoming each participant to the webinar and asking them questions.
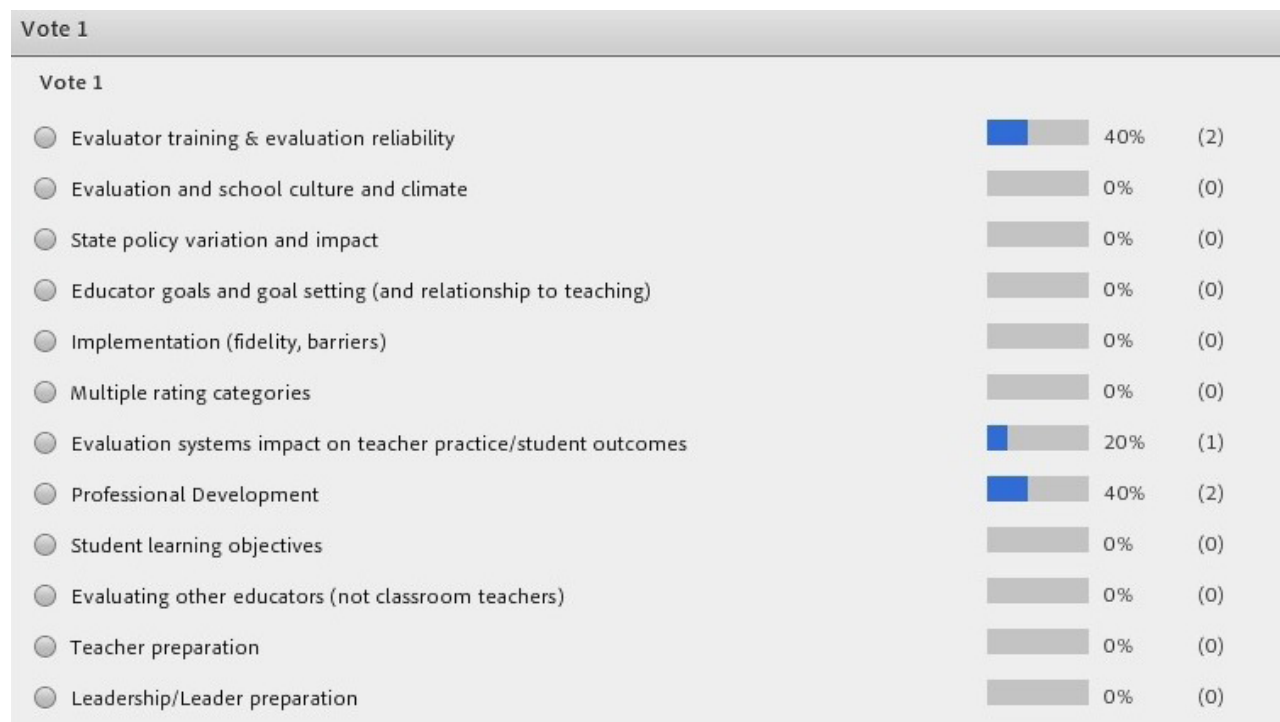
Figure 2. Examples of webinar breakout sessions

1) Eval sys impact on tch prac/std outcome	2) Prof dev for teachers/leaders
systems? Engaging stakeholders? Participant 3 **what are the key components of evaluation systems? to what degree do these have impact on professional practice and student outcomes.** Participant 3 What is the impact of eval system on Aligning HR systems? Participant 3 · What is the impact of evaluation systems on principals? Participant 2 How to use student and staff feedback in educator evaluation? (e.g. staff feedback on leaders/student feedback on both teachers and leaders) What instruments are there to use for these purposes? Participant 4 - the role of self assessment in eval systems/ does a teachers self assessment align/connect with evaluators assessment. Participant 4 - correlation between feedback given in eval systems and	will be offered? How will district/school-wide pd fit into new systems where individual teacher evaluations will be driving pd? Participant 1 **-what is the effectiveness of this linked pd/how to measure the effectiveness of this linked pd?** Participant 2 Did the pd have an effect on teachers goals (practice and student outcomes)? And how to do this (measure quality/links)? Participant 4 - how effective is PD in moving teachers through the rating systems of eval systems? Effectiveness of PD Participant 4 ı what pd (and teachers implementation of what they learned in PD) is related to student outcomes Participant 3 - see this as subtopic of Topic 1 Systems Participant 3 comparing state rules/policies and outcomes (see Other questions of interest below)
3) Teacher and leader preparation	**4) Other questions of interest**
regional, and local levels, in developing evaluation systems? (may relate to planning and design, in Topic 1) Participant 5 **districts will have own evaluation systems, how can we encompass these so that preparation programs can adequate prepare/inform their students about the different evaluation standards. How to prepare teachers for the variation in evaluation systems at the local level.** Participant 4 are there examples of state systems vs guidelines for impacting teacher/leader preparation (and teahcer evaluation)	Q -- Does a requirement for yearly checks on the proficiency of evaluators improve evaluations? -- Does the number of evaluees per evaluator impact the quality of evaluations? **-- What's the role (and differences in outcomes) of state policy driving a system vs. a district designing their own system? * (Scott)** -- What are barriers to implementation of new evaluation systems? Participant 5 **reliability and validity of evaluation instruments and systems **** Participant 4 Do NBPTS teachers tend to get higher ratings?

Source: Authors.

Prioritization activities

Participants in the in-person workshops used the "Focus Four" prioritization process to prioritize research topics and research questions. The benefit of this process is that the priorities of the alliance members become visually clear to participants. The process includes four steps. First, participants brainstorm by identifying topics of interest related to the overall goal of the alliance. Second, participants clarify their input in the brainstorming step by asking questions and making comments about topics and ideas presented. Third, participants are given the chance to advocate for their own or others' ideas. Fourth, participants canvass or demonstrate their preferences by placing "sticky colored dots" or Post-It notes on the topics or questions (written on newsprint) that they think should take priority. (For more detailed instructions on running a Focus Four process, see the facilitator guide available from the Tools & Resources section of the REL-NEI website (www.relnei. org/tools-resources.html) or by contacting REL-NEI at relneiinfo@edc.org.)

Figure 3. Example of a webinar poll on priority research topics

Vote 1			
Vote 1			
○ Evaluator training & evaluation reliability		40%	(2)
○ Evaluation and school culture and climate		0%	(0)
○ State policy variation and impact		0%	(0)
○ Educator goals and goal setting (and relationship to teaching)		0%	(0)
○ Implementation (fidelity, barriers)		0%	(0)
○ Multiple rating categories		0%	(0)
○ Evaluation systems impact on teacher practice/student outcomes		20%	(1)
○ Professional Development		40%	(2)
○ Student learning objectives		0%	(0)
○ Evaluating other educators (not classroom teachers)		0%	(0)
○ Teacher preparation		0%	(0)
○ Leadership/Leader preparation		0%	(0)

Source: Authors.

The Adobe Connect poll function was used to adapt this method to a webinar. The webinar producer took the lists of proposed priority topics and research questions and created online polls. Participants could read and select from all the proposed priority topics or research questions. The polls were set up so that participants could see the results as people voted. This mimicked the idea of participants seeing the clustering of priorities at an in-person workshop. In the Focus Four process participants are usually given several votes, such as half the number of items to be voted on plus one. In the webinar format the webinar producer displayed the same poll (for example, with all the proposed research topics) up to three times. This gave participants the option to vote for a separate priority topic each time or to vote for the same topic up to three times. Figure 3 shows what a webinar poll on priority research topics might look like.

One alliance's experience with the workshop

All eight REL-NEI research alliances participated in a Research Agenda Workshop in the first year of the REL contract. This section provides a brief description of how one alliance, the Urban School Improvement Alliance, experienced this workshop.

The alliance's membership includes research directors at medium-size urban school districts in the Northeast, including New Haven (Connecticut), Portland (Maine), Providence (Rhode Island), Syracuse (New York), Worcester (Massachusetts), and Yonkers (New York). Together, the members established the alliance's goal as follows:

> The goal of [the Urban School Improvement Alliance] is to help build the capacity of its local education agency members to use and access data to address questions around how to improve low-performing schools. Members are interested in

examining school performance in conjunction with larger social, organizational, and instructional contexts.

The alliance chose to hold its workshop in two 2-hour webinar sessions, on June 14 and July 24, 2012. Along with the alliance facilitator and two alliance researchers, six members attended the first session and five members attended the second. In the first session participants brainstormed 16 initial research agenda topics. Sample topics included:

- Definition of low-performing schools.
- Data use at the school and district levels and student outcomes.
- School-level data use barriers; how have schools overcome them?
- iPads/technology in schools.
- Evaluation system and student performance.

After identifying the 16 initial research topics, alliance members participated in the affinity grouping process, where they discussed how to organize "like topics" into broad categories using Adobe Connect's whiteboard and chat features. At the conclusion of the exercise the group had identified six broad research topics, each with bulleted subtopics: low-performing schools, data use, technology, equity, limitations, and evaluation. One alliance researcher then led the members through a voting process to prioritize the six topics. Participants were told they could each cast three votes and could distribute the votes however they wanted (meaning they could vote for one topic up to three times). The vote was conducted anonymously, using the polling feature. The voting results were as follows:

- Low-performing schools (6 votes).
- Technology (4).
- Data use (3).
- Evaluation (3).
- Equity (2).
- Limitations (0).

Reviewing what was covered in the first webinar session and presenting the goals of the second, and discussing the three priority research topics, proved to be a rich reflection of the research topics, and participants appreciated the further conversation on them

The first workshop session ended after the vote. The alliance facilitator asked the members to think about research questions they had in relation to the top vote-getting categories and the data that might be available to answer them. Participants were asked to bring those questions to the second session (July 24).

Between the two sessions the REL alliance team sent workshop notes to all the alliance's CPG members, whether they attended the first session or not. The alliance team also sent a link to the webinar archive of the session, so that absent members could view it. Based on the feedback of members who did not attend the workshop session, data use was identified as a higher priority topic than evaluation.

The alliance facilitator began the second webinar session by reviewing what was covered in the first session and presenting the goals of the second. The group then reviewed and discussed the three priority research topics: low-performing schools, technology, and data use. This discussion proved to be a rich reflection of the research topics, and participants appreciated the further conversation on them.

The session then moved into generating research questions aligned with the priority research topics. Participants were asked to share research questions that they want to see

answered. As participants proposed questions, members of the alliance team organized the questions and wrote down clarifying notes on the Adobe Connect whiteboard.

No one offered a question related to technology. Listed here are some of the proposed questions for the other two priority topics:

- Low-performing schools:
  - What are schools doing to use data to reduce achievement gaps?
  - What are definitions of college- and career-ready? Is there any empirical evidence to support them?
  - What constitutes needs for remediation in college? Are there commonalities across institutions?
- Data use:
  - What are the impediments to data use on the part of teachers and school administrators?
  - What is the link between data use and student and school performance?
  - What facilitates the use of data to help increase student learning? What are the essential capabilities, regardless of budget cuts and the like?
  - How can districts best structure themselves so that data is used well for district and policy decisions, including at the school-board level?

The group discussed the proposed research questions, clarifying and refining them. As the session wound down, the alliance facilitator explained the next steps. He told the group that the alliance team would further refine the research agenda (two priority research topics and associated questions) and then send a draft to alliance members for feedback. The group also discussed potential researchers to invite to speak with the group to address some of their questions.

After each alliance's Research Agenda Workshop was complete, debriefing sessions were held to examine the prioritized list of research questions and to develop a proposed work plan of projects

After the workshop: Toward a final alliance research agenda and work plan

After each alliance's Research Agenda Workshop was complete, debriefing sessions were held with the workshop facilitators, the REL-NEI director of research, and the REL-NEI manager of research and evaluation. The goal of the sessions was to examine the prioritized list of research questions and to develop a proposed work plan of projects that might help answer the questions. Each meeting included discussions of what relevant research already existed and what events could be hosted to disseminate and discuss that research.

Questions were identified that required additional data or an investigation of possible existing data sources prior to the development of a research study proposal. For example, one area of focus that emerged from the Early Childhood Education Research Alliance's workshop was early childhood practices and primary grade outcomes. While state data systems were still developing links between prekindergarten and elementary education data, it was decided to conduct data catalogs of district-level data in two jurisdictions. This work showed some promise in assessing whether a study was feasible. Also explored were questions that signaled the need for training to build capacity in research and data use (such as questions on teacher use of data to prevent dropouts), which emerged from the workshop conducted with the Puerto Rico Research Alliance for Dropout Prevention. Finally, each debriefing session included discussions of possible study designs for questions that were appropriate for immediate or future research studies.

All these discussions focused on the timing and sequencing of projects—to create a feasible scope of work from year to year and to ensure a consistent flow of work to maintain alliance engagement. Projects and timelines were based on research goals set out for overall REL-NEI work. These goals prioritized projects that would report frequently to the alliance, engage some alliance members intensively through project-specific advisory committees, and result in a quick turnaround of Institute of Education Sciences–approved products so that alliance members would not be waiting years for tangible results. Debriefing sessions reinforced the need to create a coherent body of work for each alliance. For alliances with research agendas containing more than one priority topic area, one topic of focus was selected for REL-NEI work so that the projects would form a coherent body of work. REL-NEI's work in building capacity supported efforts in all the alliances to engage with other external researchers to address parts of the research agenda that will not be the focus of the REL-NEI projects.

Each alliance team presented the proposed work plan to its members to check for understanding, communicate REL-NEI plans, and obtain feedback

Finally, all the alliance research agendas and proposed work plans went through a series of reviews and revisions by internal leadership groups focused on additional REL-NEI concerns. The research strategy team was composed of senior researchers from partner organizations and the REL-NEI deputy director, director of research, and manager of research and evaluation. The team met monthly to review alliance agendas and proposed work plans with a focus on how the proposed work would contribute to the overall advancement of research in the regional priority areas identified through needs-sensing with stakeholders. REL-NEI leadership—including the director, deputy director, director of research, and manager of research and evaluation—reviewed the work plans of all the alliances as a whole set, with a focus on resource availability and equity across the alliances and the region in order to develop a proposed scope of work for the second year of the REL contract. This final scope of work was reviewed by the REL-NEI Governing Board to verify that regional needs were well understood and that the plans to address them were appropriate.

While the alliance's research agendas and proposed work plans circulated through the review process, each alliance team presented the proposed work plan to its members to check for understanding, communicate REL-NEI plans, and obtain feedback on the research agenda and upcoming projects. The agendas and work plans went through two or three reviews and revisions with the alliances and internal review teams before a final draft was produced. The research agendas did not change drastically from what had emerged from the Research Agenda Workshops, but the priorities were clarified and the questions refined. At the end of this process each alliance finalized two documents: a public research agenda posted on the alliance webpage that contains all research questions along with past and ongoing projects, and an internal agenda and work plan for the alliance CPG members that includes details about future projects.

Successes

The process of engaging each research alliance in the research agenda–setting process resulted in five types of successes. The internal alliance teams communicated often with REL-NEI leadership and one another about what they learned from the workshops and how to improve the process. What follows is a summary of these conversations.

Authentic dialogue

Many alliance CPG members had never met or worked with one another, and there was concern that the lack of familiarity would make it difficult to foster workshop discussions. The workshop was thus designed to include a number of guided discussion prompts that would get members of the group talking. These discussions started with general brainstorming, allowing participants to familiarize each other with the broad issues. The discussions then narrowed to finding commonalities and differences and finally to consensus on the most pressing issues.

Alliance teams were trained in promoting these discussions by walking them through the workshop exercises and simulating the activities. The REL-NEI researchers who developed the workshop design and materials modeled the desired facilitation skills and encouraged the alliance facilitators and researchers to take ownership of the workshop content, materials, and activities. These trainings typically took about two hours, which allowed enough time to get through the entire workshop outline. The trainings were scheduled to give each alliance team an opportunity to adapt the materials to their alliance needs before the actual workshop.

The result of each workshop was a tangible research agenda document that was shared with the alliance members and that will guide future work

Common language

Because the majority of the REL-NEI alliances have members from different states and jurisdictions, it was necessary to ensure that all participants were using the same definitions and terminology. Alliance facilitators and researchers listened for jargon and pressed the participants to define terms they were using. The discussions that came from interactions helped participants deepen their knowledge of their colleagues' issues and circumstances and negotiate common definitions for words or phrases used differently across the different geographies.

Research agenda product

The result of each workshop was a tangible research agenda document that was shared with the alliance members and that will guide future work. These documents allow recording of the research process and tracking of progress, sharing of goals and research questions with future members and the region, and annual review of the agenda with the alliance members. Because the alliance members co-created these documents, they have a sense of ownership over the work conducted in the service of the alliance. The documents also help ensure that no alliance work falls outside the goals and questions documented by the research agenda.

Input to needs-sensing

While the ultimate goal of the Research Agenda Workshops was to develop a coherent research agenda, alliance members discussed a number of important issues. By allowing them time to discuss these issues—both those that directly relate to the research agenda and those that do not—the workshops helped everyone better understand education practice in the region. Because of this, the internal REL-NEI team continues to build knowledge on how to make its work with alliance members useful, relevant, and timely. All the issues and needs raised by alliance members were recorded in the REL-NEI needs-sensing database.

Relationship-building

The process of developing the research agendas was the first step in getting alliance members to build collegial relationships around a common mission. One of the consistent pieces of feedback received in the evaluations of these sessions was how much participants appreciated the opportunity to engage with their peers and colleagues on topics of urgency. Many examples were noted of alliance members raising an issue during these workshops and receiving tools, documents, or advice from others in the group to help them proceed with their work.

Remaining challenges

As work with the REL-NEI research alliances moves forward, several challenges remain. Four challenges are briefly described below.

Addressing changing membership

REL-NEI alliances have already experienced some turnover as people retire, move out of the region, or change positions. REL-NEI is planning on expanding alliance memberships in future years to include different stakeholder groups and interests. Because of this fluidity, one issue to consider is how to orient new members to the research agendas and give them a sense of ownership, while maintaining the goal of creating and implementing a coherent agenda within each alliance.

Balancing being nimble with cohesion

Education landscapes will likely change for participants as a result of elections, federal policy initiatives, or other state or district factors. How to maintain the goal of creating coherent research agendas while still being responsive to changing contexts and needs in the region will have to be explored. For example, the granting of federal Race to the Top early childhood contracts to some states has made early education a higher priority than it was at the formation of the Early Childhood Education Research Alliance.

Measuring impact

Systems need to be developed to track progress against the research agendas and to determine the impact this work is having for members of each alliance and stakeholders across the region. Efforts are under way to define what a successful alliance is and how to know that an alliance's research agenda is driven by member needs and directly relevant to their work. The research and data-use capacity that the alliance work builds in alliance members needs to be measured. Although secondary to the focus on serving stakeholders, it is important to contribute to the understanding of alliance research and the development of a typology of alliances and collaborative practices. While the theme of collaborative research is cited often in education research, it is important that the field move beyond the use of labels to a better understanding of how to identify and catalog collaborative research in practice so that the labels do not lose meaning.

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Matching program timeline to alliance needs

Timelines associated with the REL-NEI program required that the alliance create research agendas and develop projects that relate to them within six months of its first meeting. Due to this compressed timeline, the development of the alliance research agendas was highly structured and relatively quick. Some alliance members would have preferred a more extended discussion and iterative process. Many of the models of alliance research have started more organically, with time to develop relationships and create agendas over several years. Given the five-year framework of the REL contract, the organic process of relationship-building among some existing research alliances has to be balanced against the structured requirements of the contract.

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As stated in the introduction, the major thrust of the new RELs is to launch and support a set of research alliances consisting of state and local policymakers, practitioners, and researchers—to undertake research on areas of special concern in each large and diverse REL region. The Research Agenda Workshop was created to support alliances in the identification and development of research agendas rooted in their actual needs and priorities.

The workshop process showed that attaining consensus around research priorities and questions was possible and that sharing the workshop experience brought alliance members closer

The workshop process proved useful for generating a realistic and attainable research agenda with buy-in from alliance members. It showed that attaining consensus around research priorities and questions was possible and that sharing the workshop experience brought alliance members closer.

It is hoped that the experience outlined here and the materials developed can be of use to other RELs and others seeking to create research agendas among alliances or other types of research–practitioner partnerships. Every research alliance is unique, however, so users are encouraged to customize these materials and the workshop to meet the distinct needs of their group.