



METROPOLITAN EDUCATIONAL
RESEARCH CONSORTIUM

STRATEGIC PLAN

2022 - 2027

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BACKGROUND & METHOD

In the spring of 2021, the [MERC Policy and Planning Council](#) voted to initiate a strategic planning process. The decision was based on two factors: (1) the rapid growth of our partnership since our last strategic planning process in 2016, and (2) a recognition that the context of public education has shifted dramatically in response to the school disruptions related to pandemic and sociopolitical changes. The MERC 2022 - 2027 Strategic Plan is the result of this work. This plan presents (1) an outline of strategic issues facing our partnership, (2) a set of strategies for addressing these issues, and (3) an implementation plan.

STRATEGIC PLANNING PROCESS

To lead this work we assembled a committee composed of representatives from VCU and each of our member school divisions. In addition, the planning process involved outreach, through meetings and focus groups, to a wide range of stakeholders including school division leadership teams, central office leaders, school personnel, VCU School of Education leadership, faculty and graduate students (see next page). At these meetings we engaged in discussions about MERC – where we are now and where we hope to go – and incorporated the ideas into our emerging strategic plan.

Below are the steps of our strategic planning process.¹

- **Review of MERC's guiding documents and current activity.** As a starting point for the conversation, the planning committee reviewed MERC's mission, goals, and principles; our partnership agreement; and our current work. The purpose of this review was to consider issues of organizational alignment.
- **Stakeholder analysis.** The team then conducted an analysis of our stakeholders, asking the questions: Who holds a stake in MERC's work? And, how does each stakeholder measure MERC's value? This analysis examined the variety of stakeholders that exist within our division partnerships, across VCU, and across the broader landscape of public education.
- **Environmental analysis.** Our next step was to conduct an environmental analysis to assess our internal strengths and weaknesses, as well as our external opportunities and challenges.
- **Strategic issue agenda.** The steps above were then used to identify a strategic issue agenda that outlined key challenges faced by MERC that were critical to our ability to fulfill our mission and achieve our goals.
- **Formulation of strategies.** Next, we developed a list of strategies to guide our work over the next five years. Some of the strategies we developed involve refining or enhancing resources for current practices, while others represent a more dramatic shift in our priorities and/or in the way that MERC operates.
- **Development of an implementation plan.** Finally, we developed a plan to guide and monitor the implementation of these strategies. The implementation plan includes semi-annual reviews of our progress in these strategic areas through the coming years.

¹ Adapted from Bryson, J. M. (2018). Strategic planning for public and nonprofit organizations: A guide to strengthening and sustaining organizational achievement. John Wiley & Sons.

BACKGROUND & METHOD

PARTICIPANTS IN STRATEGIC PLANNING CONVERSATIONS

* Member of the strategic planning committee

Chesterfield

Patty Fox, *Director of Research and Evaluation* *
Eric Ekholm, *Education Data Specialist* *
Carolyn Waters, *Teacher*

Hanover

Nancy Disharoon, *Director of Accreditation and Accountability* *
Michael Gill, *Superintendent*
Jennifer Grief, *Assistant Superintendent*
Brian Maltby, *Disciplinary Hearing Review Officer*

Goochland

Matt Caratachea, *Coordinator of Technology Integration and Innovation* *
Jeremy Raley, *Superintendent*
Steve Geyer, *Assistant Superintendent of Instruction*
Andrew Armstrong, *Executive Director of Business Operations*
Stacey Rainbolt, *Coordinator of Testing*

Henrico

Tiffany Hinton, *Director of Department of Assessment, Research, and Evaluation* *
Beth Teigen, *Assistant Superintendent*
Alma Kenup, *Teacher*
Jenny Smith, *Teacher*
Cara Jean O'Neal, *Professional Learning Specialist, Office of Equity, Diversity and Opportunity*

Petersburg

Gwen Price, *Director of Research, Testing, and Evaluation* *
Maria Pitre-Martin, *Superintendent*
Pam Bell, *Chief Student Advancement Officer*
Seth Stephens, *Chief Communications Officer*
Patricia Johnson, *Policy Manager*

Richmond

Damia Thomas, *Director of Academic Operations* *
Tracy Epp, *Chief Academic Officer*
Autumn Nabors, *Director of the Department of Curriculum and Instruction*
Patricia Woodberry, *Teacher*

VCU

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David Naff, *Associate Director, MERC/VCU* *
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Faith Wilkerson, *Minority Educator Recruitment, Retention and Equity Center*
Kimberly McKnight, *Executive Director, Center for Teacher Leadership*
Tamara Sober, *RTR Secondary Curriculum Coordinator and Alumni Coordinator, Center for Teacher Leadership*
Al Beyers, *Assistant Professor, Center for Innovation in STEM Education*
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ON MERC

OUR MISSION

As a partnership between Richmond-area school divisions and Virginia Commonwealth University's School of Education, the Metropolitan Educational Research Consortium leads research that addresses enduring and emerging issues in PK12 education with the goal of informing policy, building the professional knowledge and skills of key stakeholders, contributing to the body of scholarly knowledge, and ultimately impacting outcomes relevant to students, schools, and communities.



OUR PRINCIPLES

- **Relevance:** Our work addresses topics in ways that are relevant to those engaged in PK12 policymaking and practice.
- **Impact:** The knowledge generated through our work is focused on its use and impact on policy and practice.
- **Rigor:** Our work is conducted in ways that reflect rigor and quality in design and implementation.
- **Multiple Perspectives:** The relevance, impact, and rigor of our work is enhanced by engaging stakeholders that represent a range of experiences, perspectives, and knowledge bases.
- **Relationships:** The strength of our partnership relies on strong relationships between individuals, organizations, and communities that are characterized by communication and trust.



OUR GOALS

- Conduct and disseminate community-engaged research that has direct and indirect impacts on critical students, school, and community outcomes.
- Develop the research knowledge and research capacity of school division personnel and university research partners through collaborations involving professional development.
- Build community and social networks between VCU units, school divisions, researchers, policymakers, and practitioners.
- Contribute to the local, state and national policy, and scholarly dialogue on education.
- Secure funding that supports the work of the partnership and builds the capacity of MERC to fulfill its mission.



STAKEHOLDER MAP

An understanding of stakeholders is critical to the success of the strategic planning process. A stakeholder is an individual or a group that has interest or investment in the work of an organization.

In an analysis of stakeholders, it is important to ask:

Who are our stakeholders?

What is their current interest or potential interest in our organization?

How do stakeholders assess performance of our organization?

MERC, as a cross-organizational partnership, is characterized by the diversity of its stakeholders. At one level this includes the communities of our member school divisions, which represent a range of sizes and community contexts, as well as the interests of VCU's School of Education. It is also important to note that within these two sectors (PK12 and Higher Education) there are a range of interests that must be considered. The figure on the following page presents the results of the stakeholder analysis conducted as part of our strategic planning process.

MERC'S ROLE STAKEHOLDER MAP

MEMBER SCHOOL DIVISIONS

CENTRAL OFFICE TEAMS

e.g., Research Assessment and Evaluation, Professional Development, Curriculum and Instruction, School Improvement, Equity, Student Success, etc.

DIVISION LEADERSHIP

SCHOOL BOARDS

ADMINISTRATORS

TEACHERS

SCHOOL-BASED PROFESSIONALS

Non-Teaching Professionals

Provides opportunities for participation on study teams that build connections and networks with leaders from other divisions

Collaborates on grants aligned with division priorities

Serves as a trusted research partner to extend the work of research offices

Provides opportunities for engagement in MERC professional development (e.g. conference)

Supports the engagement of building-level practitioners directly in research activities (for example, through Action Research Cohorts) building their capacity for research use

Informs decision-making of central office departments by providing recommendations that could help shape district policies / practices

Facilitates connections and networks with other division research leaders

Provides information that can be used in district presentations to school boards

VCU SCHOOL OF EDUCATION

DEAN / SOE ADMINISTRATION

SOE DEPARTMENTS

Educational Leadership, Research and Evaluation, Counselor and Special Education, Teaching and Learning

VCU FACULTY

Junior/Senior, Research/Teaching

VCU STUDENTS

Doctoral, Masters, Undergraduate

Provides opportunities for participation on research and study teams that build connections and networks with leaders from local school divisions and across VCU

Provides student opportunities for applied research and evaluation experience through co-curriculars and externships

Provides faculty and students infrastructure for grant writing

Pursues external funding that brings indirect support to the School of Education

Promotes VCU's national, state, and local prominence

Provides opportunities for faculty and student to participate in community-engaged research studies with local districts

Provides opportunities for faculty to build relationships and engage in research studies with local districts with the potential of increasing scholarly productivity

ON STRATEGIES

"Strategies are the extension of an organization's mission, forming a purpose-driven bridge between the organization and its environment."²

The primary purpose of our planning process was to develop a set of **strategies** to guide MERC's work moving forward. These strategies were formulated in response to identified organizational needs (called **strategic issues**) that are critical to the fulfillment of our mission. Issues were determined to be strategic when they meet the following four criteria:

- They are tied to our mission and goals
- They are within the locus of our control
- They suggest more than one path forward
- They have consequences if not addressed

Through our process, we identified seven issues, which have become our **strategic issue agenda**. Each issue is phrased as a question. Following Bryson's quote above, if strategies are the bridges that connect our work to practice, the strategic issues show where the bridges need to be built.

Our strategic issue agenda then led us to conversations about practical alternatives for addressing the issues. Out of these conversations we developed a set of strategies that we organized into four **strategic areas**.

- **Strategic Area 1:** Study Design
- **Strategic Area 2:** Dissemination and Professional Learning
- **Strategic Area 3:** Building Capacity
- **Strategic Area 4:** Membership and Governance

On the pages that follow, we elaborate the four **strategic areas**, as well as the specific strategies that we plan to implement. For each strategic area we also (1) identify the alignment with our strategic issue agenda, (2) put forward **one- to two-year actions**, and (3) establish preliminary **performance measures**. We have also indicated that certain strategies are ready **for implementation**, while others are **for exploration**. Exploratory strategies represent fundamental shifts in our organizational structure or mission.

This strategic plan will be regularly revisited in the coming years to monitor our performance measures, further articulate our actions, and, if needed, reassess our strategies. The process for regular reassessment is discussed further in the **implementation plan**.

STRATEGIC ISSUE AGENDA

Below is a list of strategic issues identified by the MERC strategic planning committee and then elaborated after the analysis of data from focus groups with VCU faculty and school and central office employees representing MERC member divisions. Each strategic issue is phrased as a question that implies the need for action, and for which there are multiple answers.

- **Relevance:** How can MERC ensure the relevance of its work to shifting needs of local school partners across a variety of community contexts?
- **Impact:** How can MERC improve the design of its work to enhance the potential for impact on educational practices and student outcomes?
- **Awareness:** How can MERC increase awareness of its work across local, state, and national audiences?
- **Policy:** How can MERC contribute to local, state, and national policy discussions on key issues on PK12 education?
- **Equity:** How can MERC support efforts toward educational equity?
- **Community:** How can MERC facilitate and nurture networks and community across the consortium and with external partners?
- **Capacity:** How can MERC ensure core funding that supports its work in a focused and sustainable way?

² Bryson, J. M. (2018). Strategic planning for public and nonprofit organizations: A guide to strengthening and sustaining organizational achievement. John Wiley & Sons.

STRATEGIC AREA 1 STUDY DESIGN

At the center of MERC's mission is our commitment to lead collaborative research studies on critical issues in PK12 education with with "the goal of informing policy, building the professional knowledge and skills of key stakeholders, contributing to the body of scholarly knowledge, and ultimately impacting outcomes relevant to students, schools, and communities." The regional MERC study is our primary method of accomplishing this. Traditionally, the topics for MERC studies are identified by our Policy and Planning Council, and then led by research teams that include faculty and students from VCU and study teams composed of central office and building-level professionals from partner school divisions. Through our strategic planning process, several strategies were proposed to refine our MERC study design.

STRATEGIC ISSUE ALIGNMENT

Relevance • Impact • Awareness • Policy • Equity • Community • Funding

STRATEGIES FOR IMPLEMENTATION

Strategy

- Increase **stakeholder involvement in the topic selection process**.

1 to 2 Year Actions (2022-2024)

- Starting with the next study topic selection process (2022-2023), MERC will conduct surveys and focus groups to elicit the ideas from key stakeholder groups that will enrich the topic development process.

MERC will institute annual meetings (starting 2022) between MERC directors and division leadership teams to discuss current and emerging topics.

Performance Measure

- Levels of engagement across stakeholder groups in topic selection survey and focus group efforts.

- Incorporate **iterative design-based elements** and/or **rapid-cycle evaluation** into our studies. This will involve **high levels of researcher/practitioner collaboration and shorter research timelines**. These approaches will be designed to have more immediate impact on program improvement, practice, and student outcomes.

- Starting with the initiation of the next study (2023) MERC will incorporate elements into the study design that involve **iterative design-based elements** and/or **rapid-cycle evaluation** to effect immediate changes to practice and impact student outcomes.

- Successful implementation of design-based / rapid cycle evaluation methods.
Measures of changes to practice.
Measures of impact on student outcomes.

- Implement **research-use studies** to determine the uptake of MERC research within partner divisions, as well as potential impact on practice.

- Starting with the initiation of the next study (2023) MERC will include a research-use component to all MERC studies.

- Successful implementation of research-use studies.
Measures of changes to knowledge and practice.

STRATEGIES FOR EXPLORATION

Strategy

- Conduct **targeted studies** (rather than regional MERC studies) that meet the needs of specific divisions or groups of divisions within the partnership.
- Build **research agenda around existing and new longitudinal data sets** that create opportunities for ongoing research on key regional and state issues.

1 to 2 Year Actions (2022-2024)

- Starting with the next study selection process (2022-2023), MERC will **explore the idea of conducting multiple targeted studies** that address the specific needs of individual school divisions or collections of school divisions within the MERC partnership. A cost-benefit analysis of this approach will be brought to the Policy and Planning Council for consideration.
- MERC will convene a workgroup (2022-2023) to explore research practice partnership models that involve the housing and regular collection and analysis of longitudinal data. The work group will consider MERC's prior work in this area, and opportunities that exist for MERC to expand these efforts. Upon completion of the analysis, a cost-benefit analysis will be presented to the Policy and Planning Council for consideration.

STRATEGIC AREA 2 DISSEMINATION & PROFESSIONAL LEARNING

The potential of MERC's research to impact educational policy and practice depends, in large part, on our ability to disseminate the findings in forms and through channels that reach broad audiences. It is also critical that these dissemination efforts engage policymakers and practitioners with our work in ways that lead to meaningful professional learning, and ultimately to action. To accomplish this, MERC has developed a wide range of dissemination strategies that include scholarly presentation and publication, practice-facing research reports and briefs, our podcast, and our website. We have also presented our work through professional learning opportunities, most notably our annual conference. In our planning process, a number of strategies were suggested to continue the refinement of our work in this area, and possible expansions of the audience for our research.

STRATEGIC ISSUE ALIGNMENT

Relevance • Impact • Awareness • Policy • Equity • Community • Funding

STRATEGIES FOR IMPLEMENTATION

Strategy

- Increase the **accessibility and usability** of professional learning opportunities.
- Develop and implement **communications / dissemination plan** focused on expanding local and state audiences.
- Develop **channels and forms of communication focused on the policy making community** (local school boards, state board, federal policy makers).
- Increase productivity in **scholarly presentation and publication**. Scholarly work could highlight the work from core MERC studies as well as the process of leading research practice partnerships.

1 to 2 Year Actions (2022-2024)

- Starting in **2023** shift the timing of the MERC conference to increase participation by building-level practitioners.

Through **2022-23** expand the online seminar model of research dissemination.

Starting in **2022-23**, create and disseminate asynchronous professional learning module-based professional resources.
- Starting in **2022-23**, develop a plan that outlines communication activities and elaborates strategies for expanding stakeholder engagement with MERC's work.

Starting in **2022-23**, engage communications interns to support social media and other communications work.

Starting in **2022-23** initiate a MERC rebranding effort that includes logo and website redesign.
- In **2022**, establish a process for the development of briefs on critical issues in PK12 education for local (LEA) and state level (SEA) policy boards.

In **2022-23**, begin the development and dissemination of policy briefs.
- Starting in **2022-23**, develop and implement a plan for supporting scholarship related to MERC's core work. This plan will include annual publication and presentation targets.
- Starting in **2022-23**, lead publication efforts on topics related to Research Practice Partnerships.

Performance Measure

- Attendance at the annual conference and online seminars.

Evaluation feedback related to relevance and impact from conference and online seminars.

Successful development and publication of asynchronous professional learning modules.

Engagement with asynchronous professional learning modules.
- Participation and engagement with listserv.

Website/social media analytics.

Engagement of communications interns.

Successful rebranding effort.
- Design and implement a process for the development of policy briefs.

Published policy briefs.

Metrics on policy brief dissemination and use (e.g. Scholars Compass).
- Numbers of accepted scholarly publications and presentations.

Manuscript submitted for a book related to MERC's Research Practice Partnership model.

STRATEGIC AREA 3

BUILDING CAPACITY

The funding that supports MERC's work has grown significantly over the past five years. This funding comes from a wide range of sources including annual dues from our partnering school divisions, a financial commitment from the VCU School of Education, and external funding through both grants and contracts. Some of our external funding supports our core MERC studies, while in other cases, this work involves contracts for research or evaluation services. Through the strategic planning process, we determined that building an aligned and sustainable funding model is essential if we hope to enhance the scope and impact of MERC's work.

STRATEGIC ISSUE ALIGNMENT

Relevance • **Impact** • Awareness • Policy • Equity • Community • **Funding**

STRATEGIES FOR IMPLEMENTATION

Strategy

- Develop and implement a strategy for external funding to support MERC research, evaluation, and professional learning efforts.
- Develop and implement a strategy for expanding contracted evaluation and applied research efforts in line with our mission.
- Develop and implement a strategy for local foundation funding to support MERC's core operations.

1 to 2 Year Actions (2022-2024)

- Starting in spring of **2022**, convene a workgroup to develop and implement a plan for external funding. This will include plans for committing time and resources to build capacity within MERC for grant-writing efforts.

Starting in **2022**, conduct targeted outreach to VCU School of Education departments and centers, and cross campus units, to identify opportunities for grant-writing collaborations.

Starting in **2022**, conduct outreach to school division grant departments to identify opportunities for collaborative funding.
- Starting in **2022**, develop networks with education-related nonprofits that may need evaluation and/or applied research support.

Starting in **2022**, explore partnerships with VCU / SOE centers that could lead to evaluation contracts.

Starting in **2022**, explore evaluation partnerships with school division leaders.
- Starting in spring **2022**, develop and implement a plan for the pursuit of local foundation funding to support MERC's core operations.

Performance Measure

- Number of funding partnerships/collaborations established.

Number of external funding applications submitted.

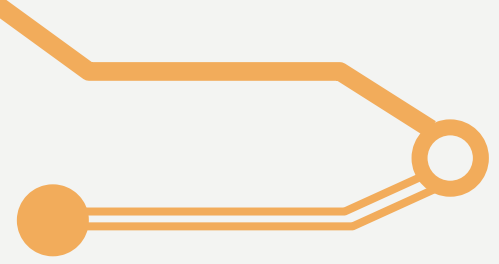
Number of external funding dollars awarded.
- Number of proposals submitted for contracted evaluation projects.

Number and size of contracted evaluation projects.

Number of proposed and contracted projects that involve partnerships.
- Number of proposals submitted for local foundation funding.

Number of local foundation funding awards and total dollar amount awarded.

STRATEGIC AREA 4 MEMBERSHIP & GOVERNANCE



MERC leadership will revisit the 2022-2027 Strategic Plan twice a year to monitor implementation and make adjustments to the plan as needed. The implementation questions below will guide our discussions. An implementation overview will be included in MERC's annual report.

STRATEGIC ISSUE ALIGNMENT

Relevance • Impact • Awareness • Policy • Equity • Community • Funding

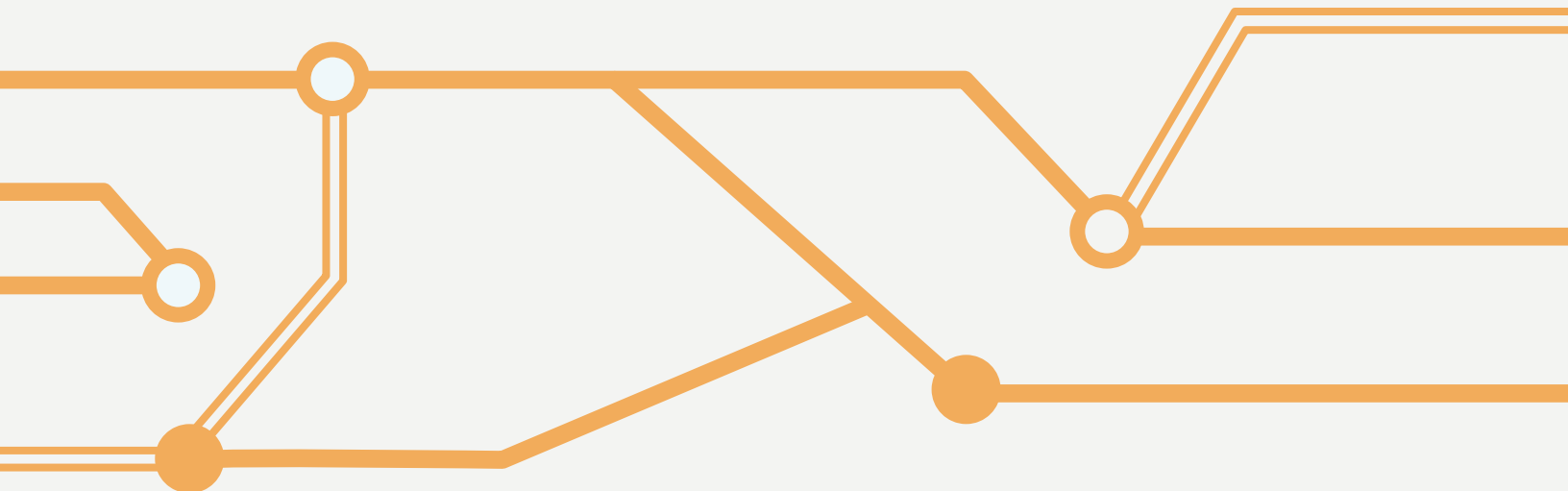
STRATEGIES FOR EXPLORATION

Strategy

- Open MERC membership to other Virginia school divisions.
- Expand representation on MERC's Policy and Planning Council to include additional stakeholders (e.g., building-level, additional VCU, and school board representatives).

1 to 2 Year Actions (2022-2024)

- MERC will convene a workgroup (2022-2023) to explore the possibility of expanded MERC membership. Upon completion of the analysis, a cost-benefit analysis will be presented to the Policy and Planning Council for consideration.
- MERC will convene a workgroup (2022-2023) to explore the idea of changes to the composition of the MERC Policy and Planning Council. Upon completion of the analysis, a cost-benefit analysis will be presented to the Policy and Planning Council for consideration.



IMPLEMENTATION

The MERC 2022-27 Strategic Plan will be revisited during meetings twice a year (in August and January) by MERC leadership and the MERC Steering Committee to monitor implementation and make adjustments to the plan as needed. Annual reports on the implementation of the strategic plan and any adjustments will be incorporated into MERC's annual report. The implementation questions below will guide our discussions.

IMPLEMENTATION QUESTIONS

Every 6 months, we will ask ...

- According to our performance measures, what is our progress on our strategic actions?
- What specific steps must be taken within the next six months to implement our strategic actions?
- What resources are needed?
- Who is responsible for implementing these proposals?
- How might our performance measures for the actions be specified or amended?

Every 1 to 2 years, we will also ask ...

- Based on our progress within our strategic areas, are there actions that we should retire?
- Are there new actions that should be taken to implement our major strategies?

Every 3 to 5 years, we will also ask ...

- How has our internal and external environment changed?
- Have our strategic issues changed? If so, how?
- Considering possible changes to our strategic issues, should our strategies be amended or retired?



METROPOLITAN EDUCATIONAL
RESEARCH CONSORTIUM

STRATEGIC PLAN

2022 - 2027

