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DOCUMENTED
BRIEFING



Partners in Pittsburgh Public Schools' Excellence for All Initiative

Findings from the First Year
of Implementation

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Prepared for the Fund for Excellence

The research described in this report was conducted within RAND Education, a division of the RAND Corporation. It was sponsored by the Fund for Excellence.

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PREFACE

In 2006, the Pittsburgh Public School District (PPS) approached the RAND Corporation to monitor the Year-1 implementation of the District's Excellence for All (EFA) initiative and provide feedback to district staff, the board, and other stakeholders. PPS was interested in (1) formative feedback on the first year of implementation of four-partner supported initiatives that are key components of EFA, (2) key issues related to implementation that may affect academic achievement, (3) and opportunities to strengthen implementation in Year 2.

The results of this project should be of interest to PPS board members, administrators, principals, teachers, parents, and staff of the four partner initiatives.

This research was sponsored by the Fund for Excellence, a consortium of Pittsburgh foundations. It was conducted within RAND Education, a research unit within the RAND Corporation. This research reflects RAND Education's mission to bring accurate data and careful, objective analyses to the national discussion on education policy. Comments are welcome and should be sent to Shannah Tharp-Taylor (phone 412-683-2300, ext. 4458, email taylor@rand.org).

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SUMMARY

Prior to the Excellence for All (EFA) initiative, which began in the summer of 2006, the Pittsburgh Public School District (PPS or *the District*) was facing the risk of state takeover if student achievement results did not improve. The Council of the Great City Schools (CGCS) reviewed the District's instructional program, particularly in reading and mathematics. CGCS reported that the District lacked a coherent and consistent instructional model and critically needed districtwide consistency in content and pacing of instruction because of high student mobility within the District. Findings such as these heightened a sense of urgency that motivated a decision by PPS leadership to introduce the Excellence for All plan, a comprehensive, ambitious set of districtwide instructional improvement efforts aimed at promoting its goals through managed instruction (MI).

As part of the EFA strategy, the District contracted with various external partners to provide and/or support a host of educational interventions intended to improve classroom instruction, with the ultimate goal of increasing student achievement test scores. Macmillan and Kaplan K12 (or Kaplan) were contracted to provide curricula, pedagogical approaches, and assessment tools to support their curricula, as well as to provide training on their use. The Institute for Learning (IFL) was contracted to provide professional development (PD) focused on training school administrators and instructional coaches to be effective instructional leaders. America's Choice (AC) was contracted to provide a comprehensive school reform design, incorporating each of the components of MI, in eight previously low-performing schools that have been reconstituted as "Accelerated Learning Academies" (ALAs).

In Year 1 of the implementation of these contracts, the District asked RAND to conduct a formative evaluation of these partners. The aim of this work is to provide formative feedback to District staff, the board, and other stakeholders about the implementation of EFA and to suggest opportunities to strengthen implementation in Year 2.

The guiding research questions for this project is the following:

1. What were principals', coaches', and teachers' perspectives on the primary elements of each partner's intervention?
2. What was the level of implementation and staff buy-in?
3. What issues may have affected the implementation and sustainability of the District's Excellence for All strategy in its entirety?

Question 1 investigated staff members' perspectives on the three primary services or products provided to the District by the partners. These services or products included (a) materials or curriculum, (b) assessments (tools and supporting materials), and (c) professional development. Question 2 was applied in the school-level interviews, in which interviewees were also asked to describe how they were implementing or utilizing the three products and their level of buy-in or how much confidence they had in the products they

were using (see Appendix A for the interview protocols). Additionally, during the course of the interviews, coaches and principals were asked to give their perceptions more generally for these issues and any other issues regarding their school staff as follows:

(a) How was each partner intervention being received and rolled out by school staff?

(b) What were the key supports for and barriers to implementation?

Additional issues relevant to implementation and sustainability also arose pertinent to research Question 3 from responses to these subquestions as well as other comments reported during the interviews. Those data were also analyzed and included in our syntheses.

Data Collection and Research Methods

During this project, we gathered data from multiple sources. Our examination began with efforts to clarify the theory of change (TOC) at work in EFA. Most of the analysis of the TOC occurred in the fall of 2006 through a review of materials from the District describing EFA, contracts outlining the services and materials provided by partners as well as corroborating data from observations of four professional development sessions, and interviews with District central office (nine interviews) and partner staff (ten interviews). District staff were typically interviewed individually, while partner staff were typically interviewed in groups according to partner. Each interview lasted between one and two hours.

Data collection during the spring of 2007 focused on school-level interviews with principals, curriculum coaches, and teachers from a total of 16 randomly selected schools, stratified by grade level. Teachers were randomly selected within schools from among those who worked with at least one of the partner initiatives (Kaplan, Macmillan, America's Choice, or IFL). Interviewees included all principals in the selected schools, 28 curriculum coaches, and 48 randomly selected classroom teachers. To promote openness in responses, interviewees were guaranteed anonymity. Following their selection, all participants were assured that their responses and notes taken during their interviews would be held in confidence by the research staff and that interview notes would be destroyed shortly after the report was written. Interviews were held in a variety of rooms at the selected schools including classrooms, offices, and libraries.

Our goals for the study design were to reduce selection bias through our use of a randomized sample of schools and gather enough responses to generate the majority of the perceptions of the District staff relevant to the topic of interest. We are confident that our findings accurately portray the experiences of those persons interviewed from the District and partner staffs. We are also confident that the views expressed by respondents in this study are likely to be held by many more staff members throughout the District who were not selected to participate in the study. At the same time, the sample of schools and teachers

represented in the study may not represent every perspective within the District. Further, the number of individuals interviewed was not sufficient to statistically generalize perceptions to the entire population of teachers, coaches, and principals in the District. Therefore, all findings in this documented briefing carry the caveat, “according to respondents in our sample.”

Summary of Key Findings

Research on comprehensive school reform suggests that 3-5 years are required for full implementation and significant achievement impact (Berends, Bodilly, and Kirby, 2002). In the PPS, the first-year implementation of EFA saw many challenges, but no more than might have been expected, given the ambitiousness of the initiative. To the contrary, despite the aggressiveness of EFA’s implementation schedule and the inevitable first-year challenges, we saw signs of promise. Below is a summary of our findings by research question.

Question 1: What were principals’, coaches’, and teachers’ perspectives on the primary elements of each partner’s intervention?

According to interviewees in our sample, promising progress was made in Year 1, but further improvements are needed with regard to implementation of each partner’s intervention. In some instances (particularly with respect to Kaplan), course corrections bear some urgency, but we saw no reason to believe that such corrections could not be made. Several of the partners’ products and services were reported as providing useful, concrete support for EFA. Those that rose to the top, according to teachers and principals, were the Macmillan curriculum, AC’s framework, and Kaplan’s data assessment tools. IFL’s services, frequently reported as useful by principals and coaches, were, by design, not a focus for implementation at the classroom level at the time of our interviews. Implementation of IFL’s Principles of Learning was planned to be more visible in the coming year. Additional partner-specific details can be found in Section 4 of the documented briefing. Additionally, respondents frequently spoke of reform components in isolation, suggesting limited understanding of how the pieces of EFA worked together to reinforce the overall agenda of improving academic achievement.

Question 2: What was the level of implementation and staff buy-in?

As was expected, the level of implementation and buy-in varied by partner. The specifics for each partner can be found in Section 4. Overall, our findings were consistent with the adage “what gets measured, gets done,” and 100 percent of the teachers using Kaplan administered the weekly assessments to their students according to the District’s centrally collected data. Additionally, 86

percent of elementary teacher respondents reported an increase in differentiated instruction using Macmillan, i.e., targeting instruction to the varying needs of different students in their classes. These findings are important indicators of implementation of the EFA initiative, since assessment and differentiated instruction were reported to be emphasized by the District in Year 1. (Teachers in middle- and high-school grades reported smaller increases in differentiated instruction, leaving room for additional inquiry into the factors that may have inhibited differentiation in middle- and high-school grades.) However, these numbers must be taken in the context of other findings that suggest room for improvements. For example, while 90 percent of our interviewed teachers reported regularly using the Kaplan materials, 90 percent also reported that the Kaplan materials were inadequate. Similarly, 72 percent and 100 percent of the respondents using curricula from Macmillan and Kaplan, respectively, reported that the pacing requirements necessary to maintain the assessment schedules were too fast. Further, many of our interviewees expressed concerns that materials were being covered too quickly for their students, time was not provided for reteaching as necessary, and that material was not being covered thoroughly enough because of the pacing guidelines.

Question 3: What issues may have affected the implementation and sustainability of the District's Excellence for All strategy in its entirety?

Coaches, principals, central office staff, and professional development appear to be supportive levers of the overall EFA effort, but these levers need further definition and alignment according to respondents. Our evidence supporting this claim includes the fact that principals and teachers emphasized the importance of coaches for supplementing PD provided by the partners and the District. For example, coaches were reported to be critical to deepening and institutionalizing the changes supported through EFA. We were frequently told by principals and teachers just how important coaches were for bridging the gaps in the PD provided to teachers, clarifying the practical use of materials, and providing tailored instructions for using the materials. At the same time, coaches reported a need for their role to be clarified and articulated clearly to principals so that they are not asked to perform functions that take time from their key roles of supporting the implementation of EFA.

Additionally, our examination of instructional leadership revealed room for improvement, because as just over half (56 percent) of principals in our sample were considered instructional leaders by their teachers and coaches.

PPS staff defined effective instructional leaders as those who

- communicate a vision
- structure and protect time for staff learning and collaboration
- use in-house expertise

- have knowledge of student data
- model instruction
- lead PD
- use student data with teachers
- demonstrate in-depth knowledge of content.

For the 56 percent of principals reportedly demonstrating instructional leadership, our examination revealed two forms of effective instructional leadership currently at work in the PPS—*hands-on* and *team-based* instructional leadership. As the terms imply, principals who demonstrated hands-on instructional leadership tended to take on each of the tasks themselves. Principals demonstrating team-based leadership delegated responsibility for some of the instructional leadership roles to coaches and teacher leaders, capitalizing on the strengths at the school. Both hands-on and team-based approaches were reported to be respected by teachers and coaches as effective, and currently we have no reason to view one model as more effective than the other. Our data do suggest, however, that K-5 principals have an easier time being hands-on instructional leaders than principals who run schools that are larger, more organizationally complex, and have a broader curriculum.

Staff respondents valued the central office for supporting implementation but had suggestions for improving the services provided by the central office. Their suggestions included strategies for the central office to optimize planning time for staff and ideas for showcasing best practices from across the District.

Teachers in our sample were largely, though not entirely, satisfied with PD on curriculum content. However, many respondents reported a desire for deeper training on classroom how-to's, especially data use and differentiated instruction. Respondents also reported a need for more applied training on classroom implementation. Additional information on issues that may affect implementation can be found in Section 5.

Recommendations for Improving Implementation in Year 2

Based on our findings, we are making the following suggestions to the PPS central office:

Provide PD that focuses more on the practical application of differentiated instruction in the classroom. School-level respondents suggested that the District could build on a strong start in differentiating instruction through providing PD that focuses more on the practical application of differentiated instruction in the classroom. This request was commonly referred to by teachers and coaches as the “how-to’s” for differentiated instruction. While we recognize the reported emphasis on differentiated instruction in Year 1 as a promising sign, we have concerns regarding whether teachers and coaches as groups and as individuals have the same definition of *differentiated instruction* as the PPS central office. In many interviews, teachers commonly referred to small group work or work stations when referring to differentiated instruction. However, simply introducing small group work does not ensure differentiated instruction is taking place. Further, this definition is qualitatively different than the idea of tailoring the tasks and focus of instruction to meet individual children’s areas of need, which actually could take place in a large or small group. The PPS central office is aware of the need for clarifying the definition of differentiated instruction for staff and has discussed this issue. Once differentiated instruction is clearly defined, coaches might be asked to disseminate this information to teachers. In this case, “Learning Walks” might be useful. Although it was determined that the lack of emphasis on Learning Walks in Year 1 of EFA implementation was by design, Year 2 could benefit from a push to implement Learning Walks as a means of reinforcing differentiated instruction at the classroom level.

Target more professional development on data use. The assessments and data tools that support these assessments are reported to be valued by school-level staff. However, this documented briefing also suggests that use of these tools and assessments might become more widespread and more consistent across the District if professional development focused more on data use and less on computer program use, which was the focus of PD in Year 1 of implementation and which appeared to have been sufficient according to reports. Moreover, additional PD on data use in the context of the realities of time management, behavior management, and curriculum pacing requirements might be helpful for teachers. Further, coaches and teachers reported that site-based PD at the schools would afford personalized and targeted PD that teachers would be more likely to attend, with fewer barriers to accessing these sessions. Additionally, reports indicate that data were being used effectively in various pockets across the District; these effective practices could be communicated districtwide during PD sessions.

In our sample, the strategies and tools supporting data use were touted to be valuable assets for building capacity throughout the District and could be disseminated as best practices through coach networks and among staff during school-level in-services or planning blocks if time were permitted for these types of professional community-building opportunities. Finally, staff requested clear standards for accountability for how they are expected to use data.

Build on existing coach networks to disseminate best practices, create cross-district consistency, and strengthen cross-district professional learning communities. Although more targeted PD for data use was a consistent refrain from teachers and coaches, data are reportedly being used

effectively in various pockets across the District. Many of the coaches in our sample have developed strategies for unit planning and tools that encouraged or supported their teachers to use data more effectively. They also reported that they have shared their ideas or have received tips from other coaches through informal coach networks. The PPS might be able to build on those information networks as a means for building capacity throughout the District and disseminating best practices. Strategies for facilitating coach networks and building planning time included providing contact information and setting up email “aliases” for coaches and providing some unstructured time for coaches to talk during in-service training sessions.¹

Build instructional leadership capacity through promoting team-based leadership in addition to hands-on instructional leadership and an investment in coaches. In our sample, only about half of the PPS’s principals were considered to be instructional leaders by their teachers and coaches. At the same time, there is a strong undercurrent of cynicism as to whether it is possible to perform the tasks of managing the school building and serving as the school’s instructional leader simultaneously. The recognition of the numerous time-intensive responsibilities of principals is not uncommon and has been documented in the literature (Archer, 2004; Grubb & Flessa, 2006). A response to this challenge appears to have sprung up organically within the PPS, namely in the two forms of instructional leadership mentioned earlier (i.e., *hands-on* and *team-based* instructional leadership). Although both models are currently utilized in PPS schools, there seems to be less knowledge about the viability and acceptability of team-based instructional leadership. Although the evidence supporting team-based instructional leadership is mixed, there is a growing literature that schools around the world are practicing team-based or *distributed leadership* in their schools successfully (Grubb & Flessa, 2006). Particularly, Grubb and Flessa (2006) found that when local school sites participated actively with the policy-making process that produced the team-based leadership arrangements, the alternative seemed viable. PPS’s large investment in instructional coaches as part of the EFA model makes distributed instructional leadership a particularly viable strategy. Therefore, we propose attempting to increase the percentage of principals effectively acting as instructional leaders by promoting team-based instructional leadership. Since both models were reported as effective by PPS teachers and coaches, leveraging the in-house capacity within each school into a team that could effectively provide instructional leadership may be a time-efficient means to providing instructional leadership without a personnel change or the time lag necessary to allow the current principals to gain additional skills. Thus, principals would share the leadership work with others in their school, making the task less burdensome, while providing the instructional leadership needed in their schools. Additional capacity for instructional leadership can also be

¹ Email aliases are single email addresses to which subscribers can email everyone in the group.

encouraged by continuing to invest in coaches so that they can continue to share instructional leadership responsibilities with their principals.

Encourage principals to align coaches' tasks with their core roles. A third of the coaches in our sample report being asked to perform functions that are outside of the coaches' roles. At the same time, the success of EFA relies heavily on coaches passing down the training they receive to teachers and facilitating implementation of the components of EFA. This role was reported to be time intensive. Any additional roles outside of those responsibilities took away from the time coaches devoted to their core responsibilities. Therefore, we suggest that principals should be given guidance from the central office on the roles that are within the scope of coaches' functions. Principals should also be encouraged to support coaches in fulfilling functions that are core to their roles, rather than assigning other tasks that may be useful to the school but not germane to the coaches' core functions. Further, we recommend that principals be given the charge of ensuring that coaches are provided with consistent blocks of time to work directly with their teachers.²

Provide more school-based professional collaboration time built into the school year to afford sustainable transfer of information and practice into the schools and classrooms. As a group, school-level staff in our sample valued the districtwide in-services and PD provided in support of EFA. Even still, many in our sample expressed the need for time to meet at the school-building level for training more tailored to their needs. Additionally, school-level staff requested time to work within grade- or subject-level teams to build more professional community at the school-building level. Efforts at both the District-administration and school-leadership levels are necessary to develop workable time management strategies for this type of effort. More school-based collaboration time does not necessarily mean additional time away from students or outside of the contracted professional year. On the contrary, strategies may include adjusting teachers' schedules within grade level or subject area so that common planning periods are created. Additionally, time slotted for districtwide PD may be better spent in individual schools. These school-level PD sessions could be made consistent across the District by determining a particular subject that would be addressed districtwide within individual school-level learning communities.

Ensure that all staff members understand EFA as a coherent strategy. As we state repeatedly in this document, the EFA initiative is an ambitious and complex undertaking. As such, we recommend that the District clearly explain the components of EFA as a coherent strategy, which will help generate buy-in to the separate components. For example, district staff should explain to school staff the ways in which EFA's components are mutually reinforcing and should describe the connections and consistency across the services and materials associated with the external partners.

² In an interim briefing, we suggested to the central office that a clearer and more succinct description of coaches' roles and the jobs that make up the position be established. In a subsequent PPS partner meeting involving PPS central office staff and representatives from the external partners, a completed draft of the coaches' roles was presented that is to be refined and used in Year 2.

ACKNOWLEDGMENTS

We are grateful to many people who helped guide and support this study. First we want to thank the Fund For Excellence for supporting this effort. Many individuals from the Pittsburgh Public School District, including central office administrators, executive directors, principals, coaches, and teachers, graciously allowed us to interview them and provided us with access to documentation and other references. We also thank the staff of Kaplan K12, America's Choice, Macmillan-McGraw Hill, and the Institute for Learning for participating in the interviews and providing requested materials.

Gina Ikemoto at RAND reviewed this documented briefing for quality assurance. We are grateful for her suggestions and comments.

ABBREVIATIONS

| | |
|-----------|--|
| AC | America's Choice |
| ALA | Accelerated Learning Academy |
| ASA | average student achievement |
| CGCS | Council of the Great City Schools |
| District | Pittsburgh Public School District |
| ED | executive director |
| EFA | Excellence for All |
| IFL | Institute for Learning |
| ITL | instructional teacher leader |
| Kaplan | Kaplan K12 |
| Macmillan | Macmillan-McGraw Hill |
| MI | managed instruction |
| NCLB | No Child Left Behind Act |
| PD | professional development |
| POLs | Principles of Learning |
| PPS | Pittsburgh Public School District |
| PPSPE | Pittsburgh Public Schools Partner Evaluation |
| PSSA | Pennsylvania System of School Assessment |
| TOC | theory of change |

Section I. Introduction and Background



Partners in Pittsburgh Public Schools' Excellence for All Initiative: Findings from the First Year of Implementation

Annotated Briefing to the
Pittsburgh School District

RAND
August 2007

The Pittsburgh Public School District (PPS or the *District*) is implementing a comprehensive, ambitious set of districtwide instructional improvement efforts that aims to achieve “Excellence for All” (EFA). The RAND Corporation has been engaging with the District to monitor the implementation of the District’s EFA initiatives in Year 1 and will continue that monitoring through the 2007-08 school year (Year 2).

As part of the EFA strategy, PPS contracted with external partners to provide and/or support a host of educational interventions intended to improve classroom instruction with the ultimate goal of increasing student achievement. Partner interventions targeted the core of the District’s managed instruction (MI) strategy, ranging from curriculum and assessment development to professional development to whole school reform. In Year 1 of the implementation of these contracts, the District asked RAND to conduct a formative evaluation of a subset of the partners for these materials and services (i.e., Kaplan K12 Learning Services (or Kaplan), Macmillan-McGraw Hill, America’s Choice [AC], and the Institute for Learning [IFL]). Data collection for Year 1 of this study commenced in September 2006 and ended in June 2007. Through Year 1, RAND has provided the District with information documenting the

critical factors shaping implementation of the District's instructional improvement strategy. Our work in Year 1 monitored the early stages of the reform implementation; informed the District's systemic operations by highlighting issues at the central office, school, and staff levels; and raised questions relevant to inter-partner coordination that will continue to evolve over the next phase of the reform effort. In this document, we present the major activities of Year 1 of the study and the findings and recommendations that resulted from this work. The aim of this work is to provide feedback to District staff, the PPS board, and other stakeholders about the implementation of EFA and inform any areas of operation that may impact changes in student achievement scores expected in 2008. The most significant findings to date have centered on how the work of all the partners and central office staff come together at the school level.

The materials in this document have been briefed to the following audiences:

The Central Office Administration of the Pittsburgh Public School District (May 22, 2007).

The Education Committee of the School Board for the Pittsburgh Public School District (June 5, 2007).

The Districtwide Meeting of Principals of the Pittsburgh Public School District (July 30, 2007).

Briefing Outline

- I. Background: Motivation for Excellence for All (EFA)
- II. The District's strategy for improving student achievement: Promoting EFA through managed instruction (MI)
- III. Research goals/design/areas
- IV. Implementation progress by partner
 - Macmillan
 - Kaplan
 - Institute for Learning
 - America's Choice
- V. Issues affecting implementation and sustainability of EFA
- VI. Summary of key findings
- VII. Recommendations for strengthening implementation in Year 2

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Below, we provide the context in which the school reform is taking place and PPS's motivation for initiating EFA. We then provide more detail on EFA and the components of MI that were contracted out to the partners whose services were the focus of this project. Next, we present the goals, design, and areas of interest of this project. These are followed by our findings by partner and other important issues synthesized from the data that may affect implementation and sustainability of EFA moving forward. A summary of the key findings for the project and our recommendations for strengthening implementation in Year 2 of EFA conclude the document.

Motivation for EFA stemmed from low performance and achievement gaps between schools

- ▣ PPS proficiency levels were below state averages
- ▣ Many schools fell short of NCLB standards
- ▣ There were large differences in achievement across schools
- ▣ There was an absence of a coherent and consistent districtwide instructional model
- ▣ Substantial student mobility suggested the need for districtwide consistency in content and pacing of instruction

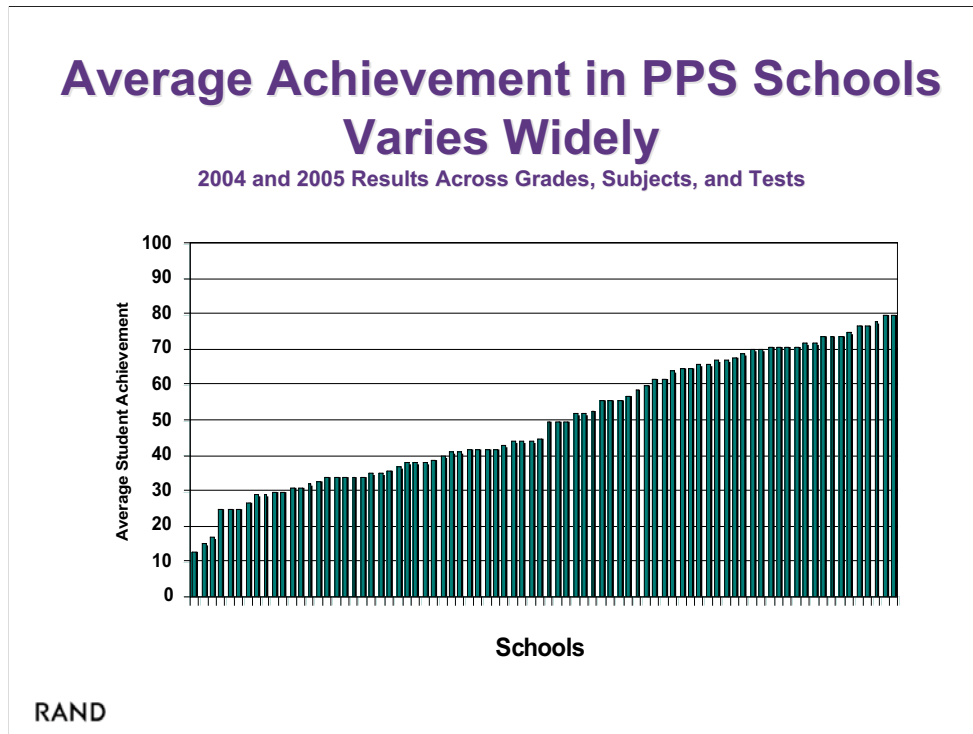
RAND

Prior to the EFA initiative, which began in the summer of 2006, PPS was facing significant challenges. The percentage of students achieving proficiency in reading and math was substantially below state averages, with many schools falling short of adequate yearly progress standards set by the state under the federal No Child Left Behind Act (NCLB). The District as a whole was identified for improvement under NCLB and was at risk of state takeover if achievement results did not improve in the future. Differences in achievement across schools within the District were dramatic (as illustrated on the next page).

The Council of the Great City Schools (CGCS) reviewed the District's instructional program, particularly in reading and mathematics, and reported that the District lacked a coherent and consistent instructional model and critically needed districtwide consistency in content and pacing of instruction because of high student mobility within the District.

Findings such as these heightened a sense of urgency that motivated a decision by PPS leadership to introduce the Excellence for All plan, establishing ambitious, districtwide interventions in all grade levels simultaneously.

In a prior study (Gill, Engberg, and Booker, 2005), RAND created the Average Student Achievement (ASA) metric for PPS. The ASA metric is anchored to proficiency levels on the Pennsylvania System of School Assessment (PSSA), but it also incorporates achievement tests, such as Terra Nova and New Standards, that were given in grades in which the PSSA was not used. The chart below, from Gill, Engberg, and Booker (2005), in which each column represents one school, shows the wide variation in average achievement levels across the District prior to EFA. A chart using PSSA proficiency results would show a similarly wide range.



Section 2. The District’s Strategy for Improving Student Achievement: Promoting EFA Through Managed Instruction (MI)

EFA aims to increase student achievement by improving classroom teaching across the District through managed instruction (MI)

| Managed instruction includes: | |
|--|---|
| Consistent curriculum (what and when to teach) | Consistency across the District in curriculum content, use, delivery, and pacing |
| Proven pedagogy (how to teach) | Consistent use of scientifically validated pedagogy |
| Assessment & data use (testing what was taught/ using data to improve) | Systematic use of assessment data to differentiate instruction to students with different needs |
| Accountability structure | Leadership, oversight, monitoring, and coordination mechanisms to promote implementation |

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The PPS leadership developed EFA with the aim of increasing student achievement by improving classroom instruction across the District by instituting managed instruction (MI). MI consists of four components: (1) consistency districtwide in curriculum content, use, delivery, and pacing; (2) scientifically validated pedagogical approaches and instruction on how to incorporate those practices into the classroom; (3) assessment tools (e.g., quizzes, benchmark, and unit tests) to assess what was taught and training on how to use those data to improve further instruction or reteaching, as well as to form groups for teaching tailored to individual student’s needs; and (4) an accountability structure for overseeing and monitoring implementation of the preceding components.

Four key external partners were expected to make important contributions to components of managed instruction under EFA

| | Macmillan | Kaplan | IFL | America's Choice |
|--------------------------|-----------------------------------|--------|--|-------------------------|
| Consistent curriculum | x | x | | Selected materials only |
| Proven pedagogy | x | x | x | x |
| Assessment & data use | x | x | Promotes use of data from existing assessments | |
| Accountability structure | PPS central office responsibility | | | x |

RAND

EFA included contracts with external partners, each of which contributed to the various areas of managed instruction. Macmillan and Kaplan K12 were contracted to provide curricula, pedagogical approaches, and assessment tools to support their curricula, as well as training on their use. The Institute for Learning (IFL) provided professional development focused on training school administrators and instructional coaches to be effective instructional leaders. IFL provided training in pedagogy and encouraged the use of data from existing assessment tools. America's Choice (AC) provided a comprehensive school reform design, incorporating each of the components of MI, in eight previously low-performing schools that had been reconstituted as "Accelerated Learning Academies" (ALAs). More information on each partner will be provided in the following sections.

Partners implemented MI in the following grade levels:

| <u>PARTNER (# of Schools)</u> | <u>Grade Level</u> | | | | | | | | | | | | |
|-------------------------------|------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------|-----------|-----------|
| | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| Kaplan (43) | | | | | | | E | E | E/M | E/M | E/M | | |
| Macmillan (43) | E | E | E | E | E | E | | | | | | | |
| America's Choice (8) | ← both subjects K-8 → | | | | | | | | | | | | |
| Inst. for Learning (57) | ← both subjects K-12 → | | | | | | | | | | | | |

Curriculum reform focused on math (M) and reading/English language arts (E) within those levels

RAND

EFA is an ambitious initiative that has implemented multiple programs simultaneously across the District. During the 2006-07 school year, the Kaplan and Macmillan curricula were each being adopted in 43 different schools. Students in grades 6 through 10 were being taught Kaplan's English/language arts curriculum; while some advanced students in grade eight and all in grades 9 and 10 were learning Kaplan math. The America's Choice model was being implemented in eight Accelerated Learning Academies. These schools range in level from K-5 to middle and K-8. IFL was intended to be implemented in all of the District's schools. This implementation schedule meant that some K-8 schools were working with all four partners.

EFA aimed to build the capacity for managed instruction

- ▣ Professional development for all staff groups
- ▣ Site-based curriculum coaches to provide customized support for rollout of strategy
- ▣ Support and monitoring by executive directors to promote consistently high level of implementation across the District
- ▣ Accelerated Learning Academies

RAND

In addition to contracting services from external partners, the District put in place key strategies to build internal capacity. These strategies, which were expected to support EFA and sustain its impact over the long term, relied on District personnel to play critical roles in implementing managed instruction. Consequently, the District made substantial investments in providing professional development to principals, curriculum coaches, and teachers. Meanwhile, executive directors in the central office (including those with direct line authority over principals and those serving staff functions, such as districtwide professional development) have been charged with providing oversight and monitoring implementation across the District. Principals were to provide instructional leadership in the schools, meaning that they facilitate the direction, monitoring, and guidance for implementing instruction in their schools. Curriculum coaches were hired specifically to support each school implementation of the components of EFA. Coaches were expected to serve as the critical conduits between the external partners and teaching staff: They receive (PD) from the partners and transfer this information to teachers in the school. They were intended to support EFA's implementation by providing on-site PD to teachers. Finally, PPS established eight ALAs using America's Choice comprehensive school reform model to provide intensive support for the schools and students most in need.

Section 3. Partnerships in Pittsburgh Public Schools' Excellence for All Initiative: Year 1

Purposes of this evaluation

- To provide formative feedback on the first year of implementation of four partner initiatives that are key components of Excellence for All (EFA)
- To identify key issues related to implementation of partner initiatives that may affect academic achievement
- To suggest opportunities to strengthen implementation of partner initiatives in Year 2.

This is *not* an evaluation of effectiveness/impact of the overall strategy or individual partners.

- Achievement impact will take time.
- PPS can't wait for achievement impact to assess whether EFA is moving forward as intended.
- Impact assessment planned to begin in Year 2.

RAND

This project was designed to understand the system connecting district personnel and partners as well as the mechanism through which student achievement would be affected by the EFA initiative, referred to as the “theory of change” (TOC). It was also designed to understand the implementation of the components of EFA “on the ground” in the schools. First, this evaluation was designed to provide feedback on Year 1 of Excellence for All (EFA) that could be used to improve implementation of the four partner initiatives that are key components of the initiative. Second, we aimed to identify key issues related to implementation that may affect the expected improvement to academic achievement in the coming years. Third, our goal was to suggest opportunities to strengthen implementation in Year 2. Although the main thrust of this evaluation focused on monitoring implementation of individual partner interventions, some of our most significant findings center on how the work of the partners and central office staff (e.g., executive directors) comes together at the school level. Our findings relevant to these three purposes will be explored in greater detail throughout this document.

This project was not intended to evaluate the effectiveness or impact of the overall EFA strategy. Nor is it an evaluation of the impact of the individual partners. Past studies of instructional reform efforts from other school districts across the country have indicated that achievement impact often takes 3-5 years (Gill et al., 2005; Berends, Bodilly, and Kirby, 2002). An impact assessment is planned to begin in Year 2 and continue over the next few years. But PPS did not want to wait for changes in test scores to assess whether EFA is moving forward as intended. Instead, the District asked for a formative evaluation that would help PPS to make improvements along the way.

In summary, our work in Year 1 monitored the early stages of the reform implementation; informed the District's systemic operations by highlighting critical issues at the central office, school, and staff levels; raised questions relevant to inter-partner coordination that will continue to evolve over the next phase of the reform effort; and described staff feedback regarding the partners' services.

Data collection strategy

- ▣ Fall data collection examined theory of change for Excellence for All and for each partner with district- and partner-level data collection.
 - Document review
 - Interviews
 - Observations
- ▣ Spring data collection examined implementation through in-depth school-based interviews in 16 schools.
 - Schools randomly sampled by grade level; 100% of selected schools participated
 - 5 K-5 schools
 - 5 K-8 schools
 - 3 middle schools
 - 3 high schools
 - Sample included two Accelerated Learning Academies.
 - Interviewees included all principals, 28 curriculum coaches, and 48 randomly selected classroom teachers.
 - Confidentiality was assured for all participating staff and schools.

RAND

During this project we gathered data from multiple sources in two stages. Our examination began with efforts to clarify the TOC at work in the District. These foundational data were collected primarily in the fall of 2006 through a review of materials from the District describing EFA, contracts outlining the services and materials provided by partners as well as corroborating data from observations of professional development sessions, and interviews with District central-office and partner staff.

The second stage of data collection occurred during the spring of 2007. These data built on the findings from the fall data collection, with the goal of providing materials for developing concrete recommendations for Year 2. Spring data collection focused on school-level interviews with principals, curriculum coaches, and teachers from 16 randomly selected schools (one-fourth of the schools in PPS), stratified by grade level. All of the selected principals agreed to facilitate their school's participation. In all, principals from each of the 16 schools, 28 curriculum coaches, and 48 randomly selected teachers were interviewed. Teachers included in the selection process were those who worked with at least one of the partners (Kaplan, Macmillan, or America's Choice). To promote openness in responses, interviewees were guaranteed anonymity. Following their selection, all participants were assured that their responses and notes taken during their interviews would be held in confidence by the research staff and that interview notes would be destroyed shortly after the report was written. Interviews were held in a variety of rooms at the selected schools including classrooms, offices, and libraries.

Our goals for the study design were to reduce selection bias through our use of a randomized sample of schools and gather enough responses to generate the majority of the perceptions of the District staff relevant to the topic of interest. We are confident that our findings accurately portray the experiences of those persons interviewed from the District and partner staffs. We are also confident that the views expressed by respondents in this study are likely to be held by many more staff members throughout the District who were not selected to participate in the study. At the same time, the sample of schools and teachers represented in the study may not represent every perspective within the District. Further, the number of individuals interviewed was not sufficient to statistically generalize perceptions to the entire population of teachers, coaches, and principals in the District. Therefore, all findings in this report carry the caveat, “according to respondents in our sample.”

School interviews examined components of partner programs and broader EFA implementation issues

- ▣ What were principals', coaches', and teachers' perspectives on the primary elements of each partner's intervention?
 - Materials/curriculum
 - Assessments
 - Professional development
- ▣ What was the level of implementation and staff buy-in?
 - Reception by school staff
 - Support for/barriers to implementation
- ▣ What issues may affect the implementation and sustainability of the District's Excellence for All strategy in its entirety?

RAND

The guiding research questions for this project are the following:

1. What were principals', coaches', and teachers' perspectives on the primary elements of each partner's intervention?
2. What was the level of implementation and staff buy-in?
3. What issues may affect the implementation and sustainability of the District's Excellence for All strategy in its entirety?

Question 1 investigated staff members' perspectives on the three primary services or products provided to the District by the partners. These services/products included (a) materials/curriculum, (b) assessments (tools and supporting materials), and (c) professional development. Question 2 was applied in the school-level interviews, in which interviewees were also asked to describe how they were implementing or utilizing the three products and their level of buy-in or how much confidence they had in products they were using (see Appendix A for the interview protocols). Additionally, during the course of the interviews, coaches and principals were asked to give their perceptions more generally for these issues and any other issues regarding their school staff:

- (a) How was each partner intervention being received and rolled out by school staff?
- (b) What were the key supports for and barriers to implementation?

Additional issues relevant to implementation and sustainability also arose pertinent to research Question 3 from responses to these subquestions and other comments reported during the interviews. Those data were also analyzed and included in our syntheses.

Section 4. Implementation Progress by Partner

Macmillan provided K-5 reading curriculum with supporting assessments and PD

| | Macmillan | |
|--------------------------|-----------|---|
| Consistent curriculum | X | 1. Materials <input checked="" type="checkbox"/> Reading curriculum for grades K-5 2. Assessments <input checked="" type="checkbox"/> Weekly tests <input checked="" type="checkbox"/> Unit tests 3. Professional development <input checked="" type="checkbox"/> Teachers <input checked="" type="checkbox"/> Curriculum coaches |
| Proven pedagogy | X | |
| Assessment & data use | X | |
| Accountability structure | | |

RAND

The District contracted with Macmillan/McGraw-Hill to provide a comprehensive reading curriculum for grades K-5. Macmillan developed and provided the *Treasures* reading/language arts curriculum. Because all schools with K-5 students were required to use it, it ensured a consistent reading curriculum across the District. In addition to lessons, activities, books, and other materials, *Treasures* included detailed guidance to teachers on pedagogical approaches to use in working with students. The curriculum also contained weekly and six-week cumulative assessments, which provided teachers with formative data on how well students were progressing or mastering content. Both teachers and curriculum coaches received professional development from Macmillan trainers just before the start of the school year and during in-service sessions and optional evening sessions throughout the year. Most PD targeted coaches, who were expected to take what they learned to the teachers in their schools. Two Macmillan consultants were also available on a full-time basis to the District. They will continue to be available for the first two years of implementation. These consultants provided additional training to teachers and coaches in schools on an as-needed basis.

Ten of the 16 schools in our sample included grades K-5 and were, therefore, using the Macmillan curriculum. (Five of these were K-5 elementary schools, and five were K-8 schools.)

Teacher-respondents saw Macmillan curriculum as facilitating differentiated instruction and preparation for PSSA, but had trouble keeping up with pacing guides

Strengths

- Comprehensive and plentiful
- Well-integrated
- Facilitated differentiated instruction
- Aligned well to PA standards, good PSSA prep

Challenges

- Pace was too fast according to 72% of teachers
- Lacked adequate materials for lowest-level learners (e.g., special ed)
- Required supplementing to provide lowest-level students with the necessary prerequisite knowledge in
 - phonics
 - grammar

RAND

Teachers in our sample reported a number of strengths of the Macmillan curriculum, and they reported some challenges as well. One strength often mentioned was the comprehensiveness of the curriculum. According to the respondents, the curriculum contained a rich array of materials (teacher instructions, lessons, books, supplemental materials, Web-based resources, etc.), guidance on scope and sequencing, and assessments. A second key strength, according to teachers, was that the various components of the curriculum were well-integrated. For example, assessments are for the most part closely aligned with the units and lessons, and lessons and activities build on each other well. A third strength that teachers often noted was a strong emphasis on differentiated instruction. The curriculum reportedly provides guidance on how to break students into groups and tailor lessons to each group. It included leveled readers—books at different reading levels to accommodate students who are reading beyond, at, or below grade level. Similarly, other lessons were tailored to students grouped according to level of proficiency at certain skills. Teacher-respondents also reported that the curriculum was well aligned with the Pennsylvania state standards and provided good preparation for the PSSA. Lessons mirror content covered on the PSSA, and most of this content was taught prior to the PSSA exam in March.

In general, the teachers we interviewed found the curriculum to be valuable.

As one second-grade teacher said,

“Expectations for students are higher. It is a comprehensive package, lots of materials and options. I’m doing lots more differentiated instruction as a result—more interaction between students. It gives you a structure and options in which to be creative, design the interventions your kids need. The components are better integrated than past programs—it is really a system.”

With regard to challenges, nearly three-quarters of teachers (72 percent) we interviewed felt that the pacing of the curriculum was too fast. Teachers struggled to keep up with the pacing schedule, and many wished they could have spent more time on certain topics or had more time to reteach specific skills or concepts. In addition, while several teachers noted that they found the *Triumphs* materials, which were designed for students two years below grade level, to be useful, they nonetheless reported that the curriculum could provide more materials for these students. Finally, teachers we interviewed reported that the Macmillan materials did not meet the needs for the lowest-level learners, and they had to supplement with other materials to provide phonics and grammar instruction for these students to bring them up to the level at which the Macmillan material began.

Macmillan assessments viewed by school staff respondents as rigorous and useful

Strengths

- ▣ Provided useful data for grouping and differentiation
- ▣ Prepared students for the PSSA
- ▣ Focused clearly on the skills being tested

Challenges

- ▣ Automation was needed to promote use of the data
- ▣ Unit tests were too long and challenging for some younger students
- ▣ Weekly assessments were too short for valid identification of skill mastery

RAND

Teachers we interviewed reported that the Macmillan assessments were rigorous and useful. As mentioned above, teachers administer both weekly and unit (six-week) assessments. The assessments reportedly provided teachers with useful data for establishing student groups and for differentiating instruction. The data revealed skills and concepts that individual students have mastered or with which they are struggling. Teachers used these data to group students homogeneously (and, in some cases, heterogeneously) according to specific skills or concepts on which they needed additional help. Typically, while the teacher worked with students in one group, those in other groups worked independently on other lessons. With frequent formative assessment data, teachers reportedly had the information they needed to change groupings or move students from one group to another. In addition, the frequency of the assessments enabled the teachers we interviewed to intervene earlier, rather than later, for students in need of the most help.

Like the curriculum, the assessments were reportedly well-aligned with the state standards and the PSSA, and they focus clearly on those skills tested on the PSSA, according to teachers. Many teachers respondents reported that because of this, the Macmillan curriculum did a better job than the previous reading curriculum at preparing students for the PSSA.

Nevertheless, teachers we interviewed encountered problems with the Macmillan assessments that limited their utility. First, the assessments were intended to be automated, with teachers scanning completed assessment forms and accessing timely results on their computers. However, automating the process has reportedly been a bigger challenge than the District initially anticipated, and teachers had to enter the results by hand during the entire first year of implementation.

This was a time-consuming process that limited teachers' time for other tasks. Some teachers we interviewed reported that they made little or no use of the assessment data as a result. Second, several teachers indicated that the unit assessments were particularly lengthy and that students in lower grade levels had an especially difficult time completing them. Many of the teachers we interviewed reported that these assessments could be shortened without reducing their utility significantly. In contrast, some teachers reported that the weekly assessments were generally too short and that this reduced their ability to identify whether students had mastered specific skills.

Macmillan PD provided a good foundation for implementation, but there were opportunities for improvement

Strengths

- ▣ Training sessions provided complete coverage of curriculum content
- ▣ Macmillan reps were responsive to staff members' suggestions
- ▣ Macmillan reps were accessible when staff members had questions

Challenges

- ▣ The value of unit overviews varied by the level of experience of the teacher or coach
- ▣ Coaches and teachers needed more info on instructional practice and logistics of implementation
- ▣ Some reps were not seen as knowledgeable on instructional practice

RAND

Teachers and coaches reported that, on the whole, the professional development provided by Macmillan trainers, or representatives, gave them a good foundation for implementing the curriculum. Professional development sessions gave teachers and coaches a full overview of the curriculum, including the entire scope and sequence. This helped teachers with planning and understanding how lessons and units would build upon one another. Early on, teachers in our sample understood which content was—and was not—covered by the curriculum, as well as when it should be covered. In addition, teachers and coaches indicated that representatives were responsive to their ideas for improving the curriculum or assessments and to other suggestions. Another important strength of the professional development was that representatives were highly accessible and made genuine efforts to answer questions.

However, teachers and coaches reported some shortcomings and challenges posed by the professional development. First, the perceived value of the unit overviews differed by the amount of experience of the teacher or coach. Specifically, less-experienced staff found these overviews (which consumed most of the early professional development sessions just before the start of the school year) to be more useful than did more-experienced staff. Experienced staff reported that these sessions consisted mostly of representatives describing information that was already contained in the written materials provided and

that they could have simply read through the materials themselves. These teachers would have preferred more in-depth training in the curriculum. Second, coaches and teachers told us they needed more training on instructional practices and the logistics of implementation. They would have liked more information on the nitty-gritty details of how use of the curriculum should look in the classroom. Either professional development sessions were not designed with these kinds of details in mind or representatives were reportedly unable to provide examples of these details. A third and closely related shortcoming is that some representatives were perceived as lacking knowledge of instructional practice in general. It became clear to teachers and coaches that these representatives were unable to convey how the curriculum should actually be taught.

Teacher reports suggested strong first-year implementation of Macmillan reading

Strengths

- ▣ 100% of teachers reported using materials
- ▣ 86% of teachers reported an increase in focus on differentiated instruction
- ▣ Teachers reportedly adjusted the curriculum to fit the needs of their students
- ▣ Experienced teachers were comfortable sifting through and tailoring the materials

Challenges

- ▣ Reports that fast pacing meant some concepts were rushed
- ▣ Some suggested activities reported to require unrealistic expectations for younger students to work independently and led to some classroom management problems
- ▣ Newer teachers more likely to reportedly be overwhelmed by volume of materials

RAND

Our teacher interviews suggest that the first-year implementation of the Macmillan curriculum was strong. All of the grade K-5 teachers we interviewed reported that they used the curriculum, as opposed to using older curricula or other materials. Moreover, 86 percent of these teachers indicated that they have increased their use of differentiated instruction practices as a result of the new curriculum and regular assessments. Teachers also reported that they are successfully adjusting the curriculum according to the needs of their students. The curriculum gives teachers a wide array of lessons and activities from which to choose, and teachers take advantage of this to identify those lessons most useful for their students. Hence, teachers reported that the curriculum meets the needs of students at all levels (with the exception of the lowest-level students, as discussed above). In particular, we found that more-experienced teachers were able to sift through the wealth of curriculum materials relatively easily and determine which ones to use in class. In contrast, junior teachers were more likely to feel overwhelmed by the large volume of materials and to worry about trying to incorporate as many materials as possible into lessons.

Despite strong first-year implementation, teachers noted several challenges with using the new curriculum. Seventy-two percent of teachers interviewed said that the pacing was too fast. As a result, these teachers explained that they had to “rush” some concepts or skills, leaving some students with too little time to master them. In addition, some teachers felt that curriculum activities were

predicated on unrealistic expectations for younger students' ability to work independently. Kindergarten and first-grade teachers reported frustration with attempting to teach small groups while other students working independently became disruptive. These teachers were more likely to report classroom management problems. Finally, as discussed above, several newer teachers indicated that they felt overwhelmed by the large amount of curriculum materials. These teachers often turned to the coaches or older teachers for assistance on how to navigate the curriculum but, nonetheless, wanted more guidance from the Macmillan materials and staff.

Kaplan provided secondary curriculum frameworks with supporting assessments and PD

| | Kaplan | |
|--------------------------|--------|---|
| Consistent curriculum | x | 1. Materials <input type="checkbox"/> English materials in grades 6–10 <input type="checkbox"/> Math materials in grades 8 (adv.), 9, 10 2. Assessments <input type="checkbox"/> 6-week benchmark tests 3. Professional development <input type="checkbox"/> Teachers <input type="checkbox"/> Curriculum coaches |
| Proven pedagogy | x | |
| Assessment & data use | x | |
| Accountability structure | | |

RAND

The District has partnered with Kaplan K12 to deliver curriculum frameworks for math and English/language arts in grades 6-10 for the first year of Excellence for All. (Kaplan and PPS staff will be partnering to develop additional curriculum frameworks for more subjects and grade levels in subsequent years.) These frameworks provide the scope and sequence of topics to be covered in the classroom, drawing on a variety of materials (textbooks, novels, etc.) that serve as the actual curriculum content. The frameworks were expected to define a consistent curriculum across schools, present effective pedagogical practices, and include formative, benchmark assessments and tools to help teachers use assessment data. For the first year of implementation, Kaplan developed and delivered curriculum frameworks for all English/language arts classes in grades 6-10, and for algebra I and geometry middle- and high-school classes (which generally include advanced eighth grade students and students in ninth and tenth grades). Teachers were expected to administer benchmark assessments every six weeks using the Kaplan Achievement Planner. The assessments were automated, allowing teachers to scan assessment forms and access results on their computers within minutes of their entry. The planner also included Web-based resources, such as additional lessons, that teachers can use to reteach skills and concepts. Kaplan staff provided professional development on all materials to teachers and curriculum coaches. Most Kaplan K12 training targeted coaches, who were expected to train and assist teachers in their schools with the materials. Three Kaplan staff were assigned

to the District on a full-time basis and were available to schools that requested assistance. Eleven of the 16 schools we visited were using the Kaplan curriculum (five K-8 schools, three middle schools, and three high schools).

Teachers and coaches struggled with Kaplan materials/curriculum

Strengths

- ▣ Achievement planner was useful for planning differentiated instruction and reteaching
- ▣ Achievement planner was an efficient source of data to inform grouping

Challenges

- ▣ Piecemeal distribution of units made planning hard
- ▣ Teachers reported materials were difficult to navigate
- ▣ Skill building did not follow logical sequence
- ▣ Curriculum in some units reported to be misaligned to PSSA
- ▣ Use of lessons for additional practice/reteaching was limited by lack of time
- ▣ 100% of staff members in our sample reported pacing was too fast

RAND

The teachers and coaches we interviewed struggled with the Kaplan K12 materials. Nonetheless, most valued the Kaplan K12 Achievement Planner assessment tool. They reported that the assessment data were useful for identifying which students needed help with particular skills and concepts. These data helped teachers to establish student groupings, thereby assisting them with differentiating instruction. Most teachers found the Web-based resources and tools to be helpful for reteaching skills or concepts and providing additional instructions for students who scored poorly on certain items.

However, in the view of most teachers, the benefits of the achievement planner were outweighed by the challenges associated with the curriculum. The frameworks were not complete at the start of the school year, and throughout the year Kaplan provided them to schools as they were completed. Typically, teachers received each unit only a few days before they were expected to teach it, making planning extremely difficult according to reports. Compounding this problem was the fact that teachers remained unaware of the full scope and sequence, leaving them in the dark about which topics would be covered in the weeks ahead. Teachers also reported that the materials were very difficult to navigate. Both English and math teachers indicated that the progression of skills covered by the curriculum did not follow a logical sequence. An example would be teaching students how to write an editorial one week and then teaching them about the fundamentals of writing a paragraph a few weeks later.

Teachers reportedly had difficulty understanding the rationale behind the transition from one skill or concept to another. Another problem cited by teachers and coaches was an apparent misalignment between the curriculum and the PSSA exams. The curriculum reportedly failed to include some content areas on the PSSA or covered content too late in the school year—after students had taken the exams. In addition, while teachers found the supplemental lessons in the achievement planner to be useful, they indicated that the fast pace of the curriculum limited the amount of time available for reteaching. In fact, 100 percent of teachers in our sample using the Kaplan curriculum felt that the pacing was too fast to allow for adequate introduction, practice, testing, and reteaching to their students.

Kaplan benchmark assessments were fully implemented and provided useful data

Strengths

- ▣ District records showed that 100% of teachers implemented Kaplan assessments
- ▣ Achievement planner reported to be
 - effective for identifying gaps in students' skills
 - valued for its information by standard and by student
 - efficient for providing lessons to focus on areas of students' weakness

Challenges

- ▣ Timing was reportedly misaligned with report card schedule
- ▣ Data display/interface was reportedly clunky and awkward for seeing classroom-level patterns in the data
- ▣ Respondents said their use of assessment data was limited by lack of
 - time due to pacing
 - training on application of data in classroom

RAND

The Kaplan benchmark assessments were fully implemented and were reported to provide useful information for teachers and coaches. All of the teachers using Kaplan whom we interviewed indicated that they were administering the benchmark assessments every six weeks (as they were required to do), and most of them were using the results to varying degrees. Teachers had a generally positive experience with the assessments and the other tools in the achievement planner. In particular, teachers and coaches reported that the assessment results helped them identify gaps in students' skills and other areas in which they needed additional assistance. The planner enabled them to view how well individual students performed on particular state standards. Furthermore, most teachers valued the Web-based supplemental lessons in the planner, which teachers could use for reteaching. They found this to be more efficient than having to manually track down supplemental lessons on their own.

According to one district office staff administrator,

“The Kaplan Achievement Planner is a huge bonus. It provides ongoing formative assessments every six weeks to teachers within fifteen minutes.... Using this information, teachers know where their students are struggling.... We have used item analysis before, but never has it given us the actual remediation to address a skill deficit. That addition has been enormous.”

Teachers and coaches also noted some challenges in using the achievement planner. First, they reported that the timing of the benchmark was misaligned with the report card schedule. Second, many staff found the computerized data display to be awkward or difficult when attempting to view classroom-level results. Third, teachers often stressed that while the assessment data were valuable, they were unable to spend as much time as they would have liked analyzing and interpreting the data. Teachers cited the fast pace of the Kaplan curriculum as a major reason for this time constraint. In addition, a lack of training on how to analyze student data and use it to plan instruction limited teachers' ability to get the most out of the data.

Utility of Kaplan PD was mixed

Strengths

- ▣ Training was reportedly useful for the Kaplan Achievement Planner
- ▣ Kaplan staff members were reportedly responsive to coaches' feedback

Challenges

- ▣ Trainers' familiarity with curriculum and experience in classrooms were perceived as low by respondents
- ▣ Respondents used PD time to identify and fix problems with curriculum and assessments
- ▣ Training reportedly lacked instructions on
 - data use rather than computer program use
 - the logistics of implementation in light of pacing requirements

RAND

The utility of the Kaplan professional development in the first year was mixed. Based on our interviews with teachers and coaches, we identified two key strengths of the professional development. First, training provided on the use of the achievement planner was widely reported to be very useful. Both teachers and coaches highly valued this training and indicated that it helped them become proficient at navigating the system and all of the tools it offers. Second, most coaches felt that the Kaplan trainers were quite responsive to their feedback and suggestions. For the most part, trainers reportedly made genuine efforts to answer questions and address problems.

Nevertheless, teachers and coaches emphasized three key shortcomings or challenges associated with the Kaplan professional development. First, most teachers and coaches perceived the trainers' familiarity with the details of the curriculum to be low. Professional development sessions also gave teachers and coaches the impression that most of the trainers lacked classroom experience and, therefore, were limited in their ability to address questions about classroom issues. Second, coaches reported that a substantial portion of their professional development sessions was devoted to pointing out errors and other problems in the curriculum and assessments. Trainers reportedly used many sessions to identify such problems that needed to be corrected, rather than training the coaches. Third, teachers and coaches identified specific

deficiencies of the training they received. While staff valued the training on use of the achievement planner, they felt that the training could have focused more on methods for analyzing or interpreting data. Instead, the training emphasized how to navigate the achievement planner software. In addition, the training lacked instructions on the logistics or details of implementing the curriculum in light of the pacing requirements. Teachers struggled with trying to cover all topics in the curriculum in the time required, and trainers were reportedly ill-equipped to help them with this problem.

Teacher respondents highlighted serious challenges with Kaplan implementation

Strengths

- ▣ 90% of teachers and coaches reported using at least some of the materials
- ▣ 70% of teachers reported using the achievement planner

Challenges

- ▣ Teachers reported curriculum was vague “like a rough draft of a curriculum”
- ▣ 90% of teachers reported Kaplan was inadequate or questioned whether the Kaplan curriculum adds value over other curriculum materials
- ▣ Some teachers were following the pacing guidelines but ignoring the recommended lessons
- ▣ Kaplan developers reportedly did not take into consideration other materials/tools in use in the District (e.g., *Write Tools*)

RAND

In sum, teachers and coaches reported serious challenges with implementing the Kaplan materials. In terms of utilization, implementation can be seen as successful. In particular, 90 percent of the relevant teachers and coaches we interviewed indicated that they were using at least some of the Kaplan materials. Seventy percent were using the tools in the achievement planner.

However, these successes were outweighed by several challenges. Teachers overwhelmingly found the curriculum frameworks to be vague and lacking adequate substance. Several teachers and coaches viewed the curriculum as the result of a “rush job.” According to one teacher, “*it is like a rough draft of a curriculum.*” Ninety percent of those we interviewed considered the curriculum to be inadequate. Teachers reported that they were spending more time than ever writing lesson plans because the frameworks gave them very little with which to work. Several teachers and coaches questioned whether the frameworks added value over other curriculum materials. For example, a number of math teachers reported that the McDougal Littel *Geometry and Algebra I* textbooks were sufficient on their own. Many English/language arts teachers expressed similar sentiments about the *Elements of Literature* and other textbooks. Some teachers told us that they were following the pacing guidelines but were skipping some of the recommended lessons and activities as a way to stay on track. Another common theme voiced in interviews was

that the curriculum crowded out other curriculum materials/tools, such as *Write Tools*. The District expected teachers to use *Write Tools* in the classroom, but according to District-level interviewees, the Kaplan writers reportedly did not know this and, therefore, made no mention of *Write Tools* in the curriculum. They, therefore, overestimated how much time teachers would have for teaching the Kaplan curriculum.

The Institute for Learning provided PD on instructional leadership for principals and coaches

| | | |
|--------------------------|--|---|
| | IFL | Professional development <input type="checkbox"/> Principals <input type="checkbox"/> Curriculum coaches |
| Consistent curriculum | | |
| Proven pedagogy | x | |
| Assessment & data use | Emphasis on using data from existing assessments | |
| Accountability structure | | |

RAND

The District contracted with the Institute for Learning (IFL) to provide professional development focused on instructional leadership for curriculum coaches and principals. Housed within the University of Pittsburgh’s Learning Research and Development Center, IFL partners with school districts across the country on districtwide initiatives to improve student learning. IFL has provided training for PPS principals at various points in time since the mid-1990s. Its role under Excellence for All is different in that, for the first time, the District had IFL trainers provide professional development for coaches, who are expected to implement what they learn in their work with teachers in their schools. IFL staff provided no direct training to teachers.

For the most part, IFL professional development in Year 1 focused on pedagogy. This pedagogical approach was organized around a set of nine principles of learning (POLs). POLs included an emphasis on effort rather than aptitude, clear expectations, fair and credible evaluations, recognition of student accomplishments, a rigorous curriculum, “accountable talk,”³ the teaching

³ *Accountable talk* is classroom talk that promotes learning by supporting students to be accountable to the learning community, knowledge, and rigorous thinking. For example, students who are accountable to knowledge in their learning community would make use of specific and accurate knowledge, provide evidence for claims and arguments, and have a “commitment to getting it right.”

of intelligence, self-management of learning, and learning as a form of apprenticeship.

Training for coaches was nonetheless “content focused,” meaning that the principles and techniques covered were grounded in the particular curriculum or content area the coaches were expected to know. Hence, training for K-5 reading/literacy coaches drew upon the Macmillan curriculum, and training for math coaches utilized examples from the Kaplan curriculum. Training for principals was more focused on the elements of instructional leadership. Principals generally received one day of training per month, while the frequency of training sessions varied for coaches. A few sessions brought coaches and their principals together for joint training.

Although IFL encouraged the use of formative assessment data, its program did not include an assessment component.

IFL PD promoted instructional leadership by principals and coaches, but utility varied by experience and grade level of audience

Strengths

- ▣ Training encouraged a network among coaches
- ▣ Coach training helped coaches to define their roles
- ▣ Combined principal/coach training sessions built teamwork in instructional leadership

Challenges

- ▣ Content focus limited the direct application of IFL strategies for K-5 and K-8 math coaches
- ▣ Coaches and principals reported a need for
 - more concrete strategies to take IFL principles to the schools
 - differentiated instruction for coaches/principals who have been using IFL for years
 - more training on how to teach teachers

RAND

Overall, IFL professional development assisted principals and coaches in their roles as instructional leaders. Virtually all of the coaches we interviewed reported that they found the training sessions to be useful. The training taught coaches important skills and techniques for working with teachers and helped them to define their roles. In addition, by bringing coaches together periodically, the training sessions helped to create an informal coach network. Coaches reportedly turned to each other for ideas, and in some cases more-experienced coaches served as mentors to newer ones. Furthermore, coaches and principals reported that joint coach/principal training sessions encouraged principals and coaches to work together in serving as instructional leaders and developing plans for professional development within their schools.

However, the perceived utility of IFL training sessions varied by the experience and grade level of the audience. In particular, the content focus of the sessions limited their relevance for K-5 and K-8 math coaches, because the math training sessions focused on only secondary math content. (IFL was not contracted to provide training tied to math content in lower grade levels.) Since the strategies and techniques covered are closely connected to the content, these coaches' ability to apply them was limited. This was not the case for reading/literacy coaches, as separate training sessions were provided for K-5 and grades 6-10 coaches. In addition, several principals and a few coaches were already familiar with IFL concepts and were, therefore, more likely to report that the sessions were of limited use to them. These coaches and principals would have liked

more-advanced sessions. Several coaches also had difficulty finding ways to transfer POLs to teachers in their schools. These coaches reported the need for more concrete strategies to implement and convey what they had learned to teachers. Finally, while training for coaches did focus on how to be a coach, many coaches we interviewed felt that they needed more instruction on how to teach teachers (as opposed to teaching students, a concept much more familiar to coaches, because most were formerly classroom teachers themselves).

IFL buy-in reportedly high but implementation limited by lack of clear rollout expectations

Strengths

- ▣ Principals and coaches valued the principles of learning
- ▣ Training highly valued by coaches

Challenges

- ▣ Staff members considered Macmillan/Kaplan a higher priority
- ▣ Minimal transfer of IFL content to teachers
- ▣ 14 of 16 schools had not conducted learning walks at the time of interviews
- ▣ Some principals do not see IFL as directly useful for improved PSSA scores

RAND

Buy-in to the IFL concepts and overall approach was reportedly high, particularly among coaches. Coaches reportedly valued the IFL training sessions, and many reported that they would have preferred more training. Buy-in among principals was more mixed in our sample. As mentioned above, principals who had participated in past IFL training sessions felt that the sessions offered little new information. A few other principals in our sample questioned the relevance of the IFL sessions to Excellence for All. Nonetheless, most principals we interviewed, as well as virtually all coach respondents, highly valued the POLs and believe they are fundamental to student learning.

Our interview findings suggest a lack of clear expectations regarding the rollout of IFL training and its place among the other pieces of Excellence for All. Both coach and principal respondents reported that they considered the implementation of the Macmillan and Kaplan curricula to be a higher priority and, therefore, focused most of their time and energy on those interventions. Partly as a result of this, coaches and principals reportedly spent little time training teachers on IFL content. In addition, only 14 of the 16 schools we visited reported that they had conducted learning walks—a process in which principals, coaches, and other administrators walk through a school and document evidence of the POLs in classrooms. Learning walks are a key mechanism for emphasizing the importance of the POLs to teachers. It should be noted, however, that learning walks were only beginning to be scheduled at

the time of our interviews in March and April 2007. Finally, a few principals indicated that they did not view the IFL training as useful for the purpose of improving PSSA scores. As a result, these principals did little to promote the use of IFL concepts in their schools.

America's Choice provided a comprehensive school reform model to the eight Accelerated Learning Academies

| | America's Choice | |
|--------------------------|--|---|
| Consistent curriculum | Selected materials only | <ol style="list-style-type: none"> 1. Materials <ul style="list-style-type: none"> ■ <i>Writers' Workshop</i> curriculum, grades K-8 ■ <i>Ramp-up</i> English & math curriculum, grade 8 2. Assessments <ul style="list-style-type: none"> ■ Emphasis on data use 3. Professional development <ul style="list-style-type: none"> ■ Teachers ■ Coaches ■ Principals 4. Accountability structure <ul style="list-style-type: none"> ■ Weekly leadership team mtgs. ■ Focus walks ■ Design coach (usually the assistant principal) ■ AC reading and math coach in District |
| Proven pedagogy | X | |
| Assessment & data use | Emphasis on using data from existing assessments | |
| Accountability structure | X | |

RAND

America's Choice differs from the other partners in that it provides a comprehensive school reform design, including its own internal accountability structure along with curriculum, pedagogy, and an emphasis on data use. Unlike the other partner interventions, the AC model is being implemented in only a subset of schools: the eight "Accelerated Learning Academies" (ALAs), schools targeted for intensive turnaround as part of the District's right-sizing plan. ALAs differed from other district schools in a number of ways, including having a longer school day and year and having reconstituted staffs in 2006-07. Most also saw particularly large shifts in student population in 2006-07, because students from closed schools were shifted into schools designed to accelerate their achievement. Although AC is a comprehensive school reform design, in the PPS, the model was being implemented in tandem with other reforms in curriculum and instruction. Because of high student mobility, the District decided it was important to keep a consistent K-5 reading curriculum throughout the District. In the ALAs, this meant that K-5 teachers were using the same Macmillan reading curriculum that was in place across the District, with the addition of the AC *Writers' Workshop* curriculum and the instructional approach defined by America's Choice "rituals and routines." Beyond the writing curriculum, the only AC-specific curriculum in use at the ALAs is the *Ramp-up* curriculum for eighth grade students who are several grade levels behind. In addition to these curriculum pieces, AC provided the PPS with PD for teachers, coaches, and principals in the eight participating schools and had two full-time staff (one specializing in math, the other in literacy) who worked with the eight schools on implementing the model.

America's Choice program and materials created helpful structure

Strengths

- ▣ AC's framework was reportedly consistent with the PPS' district-wide pedagogical approach
- ▣ School staff indicate that AC created structure and accountability for students
- ▣ AC writers' workshop reportedly increased focus on writing
 - Experience with different genres is useful for PSSA

Challenges

- ▣ Respondents requested the AC writers' workshop be linked more closely to Macmillan literature
- ▣ Teacher respondents wanted more guidance on assessing writing

RAND

Although staff had some initial questions and concerns about how they were expected to implement America's Choice simultaneously with Macmillan in K-5 reading, by the time these interviews were conducted in the spring of 2007, almost all felt comfortable with the distinction that Macmillan provides the curriculum and AC provides the instructional approach or framework for teaching. As one principal put it:

"America's Choice doesn't complicate implementation of Macmillan because AC is a framework not a curriculum. It is really just a tighter framework of best practices, a system for putting them in place, whatever materials you are teaching from."

Another principal echoed that

"Macmillan and America's Choice are a perfect match. AC is about best practices—important for teachers to understand it is not a curriculum but an opportunity to focus on implementing Macmillan effectively."

Coaches appear to have been crucial in helping teachers work out in practice what it meant to implement a curriculum and an instructional approach and how specifically to structure their time during the literacy block.

A number of coaches noted that the "rituals and routines" and "workshop" model encouraged by AC to structure teaching and learning spring from the same philosophical base as the Institute for Learning's Principles of Learning (POLs) and provide a way to make those guiding concrete and easy to implement. Given the feedback from many staff that the POLs remained somewhat abstract

to many school-level staff, the District might want to consider how work done at the ALAs on implementing AC pedagogy could be shared with other schools. School staff also praised the classroom routines for providing “*useful structure and accountability for a tough population,*” although noting that they require a good bit of explicit instruction to take hold with students. Math coaches in particular praised the fit between the AC approach and *Everyday Math* (another math curriculum being used in certain schools and grade levels in the District), noting that both have constructivist roots: “*The workshop model really forces kids to do and talk about math.*”

Beyond the overlay of rituals and routines and the workshop approach onto other curricula, the ALAs are implementing partial elements of AC-specific curricula: the *Ramp-up* courses in English and math for eighth graders well below grade level and the *Writers’ Workshop* curriculum. Acceptance of the *Ramp-up* curriculum was strong, with one teacher praising it as “*very well structured. Students way behind need that. It saves me time and work—everything you need is there.*” All of the ALA teachers we spoke with were also positive about the *Writers’ Workshop* curriculum, and evidence of implementation in classrooms was high. This comment was typical:

“Writer’s Workshop is very child-centered instruction—it asks teacher to be facilitator. I am pulling back from direct instruction—students are accountable for the final product. It can be hard for our kids—they are used to someone holding their hand. But it is much better prep for middle school.”

A number of teachers specifically mentioned that the work on writing in a variety of genres was useful preparation for the PSSA. Teachers did note a few areas in which the implementation of *Writers’ Workshop* could be improved. These included AC defining clear assessment criteria and linking the writing component more closely to the literature in the Macmillan curriculum.

School staff respondents saw holes in America's Choice professional development

Strengths

- ▣ School-based curriculum coaches were critical to bringing model to life
- ▣ *Ramp-up* training was considered useful and specific

Challenges

- ▣ Staff members reported AC staff have less experience than needed
- ▣ Coaches' attention was reportedly divided between AC and Macmillan
- ▣ ALA staff were not able to attend the Macmillan and IFL training that may have been necessary, and some staff felt they were missing out
- ▣ Teachers and coaches wanted more ongoing training
- ▣ Teachers viewed summer training as insufficiently specific

RAND

While principals', coaches', and teachers' responses were generally positive about the AC model in general and the specific curriculum pieces and instructional approaches that they were starting to implement, all felt that support for implementation was inadequate. In particular, school-based staff reported that the AC professional development was light on specifics and "nuts and bolts" that would help teachers transfer the ideas to their classrooms. These representative quotes illustrate this point:

"When you are sitting at the Holiday Inn eating dessert, the AC idea is clear, but with children in the room it seems vague. Where do you start?"

"Summer training was basically selling the idea . . . There were not enough nitty-gritty specifics on how to do it. It was counterproductive because people came away confused. People kept asking, 'just tell us what we have to do,' but they were not responsive to that feedback."

A principal with prior experience with AC was particularly disappointed by the PD support:

“Prior knowledge of AC (by myself and the coach) helped us roll out to staff despite weak support, especially no good PD for staff. The summer session was not nearly enough to support expectations for implementation. Summer was an okay intro but mostly rolled out concrete things like 25-book challenge, book of the month, the parent engagement piece. Nothing specific on the purpose or how to of the workshop model, which is the core—nothing to break down the components. That can only be done with ongoing PD, which I thought was in their contract. Coaches have had some ongoing PD, but none was provided for teachers. Teachers had no clear definition until we did our own session using our old field guides. There has been no PD for the design coach.”

The exception to this frustration with lack of specifics was the *Ramp-up* training, which teachers reported *“really modeled how to do it.”*

As with all of the partner interventions examined in this study, school-based curriculum coaches were the vital link in teachers transferring training to their classrooms and making it real. Coaches were particularly critical for an intervention that is less concrete and tangible than a physical curriculum that teachers were expected to implement. Teachers and coaches reported that their ability to play this vital transmission role with regard to AC was limited in Year 1 of implementation by several factors.

To begin, with a new reading package being rolled out, there were first-year questions and glitches. Coaches in AC schools thus devoted much more of their time than they had expected to Macmillan, limiting their ability to focus systematically on AC. Next, coaches in AC schools expressed the desire to be involved in IFL coach training, having heard from peers in other schools that IFL training presented a clearer model of the coach role than did the AC training. Finally, school staff felt that AC’s in-district support was weak, with the partners’ local representatives seen as lacking content knowledge and deep understanding of how to move from principle to practice. Several interviewees mentioned receiving *“canned answers”* or *“answers right out of the field guide.”*

AC system for formative monitoring and feedback was not functioning as intended

Strengths

- ▣ School leadership team meetings were reportedly in place as intended
- ▣ Respondents reported that the midyear quality review implementation rubric was a useful and important tool

Challenges

- ▣ Rubric reportedly not utilized by AC staff as intended: five-point scale reduced to yes or no, reducing utility of feedback
- ▣ Midyear review feedback seen as generic rather than actionable: no clear roadmap for improvement provided

RAND

ALA personnel that we interviewed reported that the America's Choice model provides a useful structure for instructional leadership, with weekly leadership team meetings focused on instructional issues. In both of the ALAs visited, the team reported using focus walks and assessment data to fuel conversations about specific improvements needed in teaching and learning and to plan for professional development. However, a principal questioned the AC value added in the process: *"We would have same leadership team meetings if we were not an AC school, but AC gives us some useful structure and language."*

The detailed implementation rubric provided by America's Choice was viewed by school-level respondents as a potentially useful roadmap for implementation, but staff respondents expressed frustration with how the tool was used in the midyear quality reviews. In both schools, staff prepared for the review extensively and in great detail only to find the process cursory and the feedback generic. In part, this was a result of the last-minute decision to assess implementation elements in a dichotomous yes or no fashion rather than according to the developmental rubric. A coach noted: *"The quality review provided no useful feedback. 0 or 1 tells you nothing. That is exactly in opposition to what they tell us to do with kids—[they are not]*

developing expectations we can follow.” A coach in another school seconded this sentiment:

“We put a lot of time and thought into the self-assessment rubric. It is a useful tool. But the feedback we got was not useful. They reduced the rubric to a yes or no. The next steps provided were too broad—like right out of the field guide. The quality review was everything we are doing wrong, not how to do it right. It was really disappointing, not helpful at all.”

All of the respondents reported that they hoped that the end-of-year reviews would be more substantive and actionable.

Tangible components of AC program were in place, but buy-in and depth of implementation were in doubt

Strengths

- ▣ Tangible components were in place including
 - *Writers' Workshop*
 - Standards-based student work on walls
 - 25-book campaign and principal's book of the month
- ▣ School staff generally supported AC approach

Challenges

- ▣ Deep-rooted implementation hampered by
 - lack of ongoing PD
 - focus on implementing Macmillan
- ▣ Disappointment with AC support undermined buy-in
- ▣ Lack of clear expectations

RAND

Compared with staff in other district schools, school staff in the eight ALAs reported that they faced unique implementation challenges in the 2006-07 school year. First, because of school reconstitution, staff were just getting to know each other, the neighborhoods, and the students. Second, ALAs were structured differently than the other schools in the District. For example, they had a longer school day and year than the rest of the PPS schools. Their longer school day presented challenges in getting to PD sessions, since teachers were often not finished with their teaching day when PD sessions began, not to mention the additional travel time necessary to arrive at the off-site location. ALAs that were new K-8 schools faced the challenges of middle-school students moving back from a middle-school environment into schools with younger students and buildings not built for larger and older students. Third, ALAs worked with the most number of external partners and, subsequently, had to figure out how the various interventions connected and integrated. In the face of these challenges, it is not surprising that AC implementation is incomplete; equally predictable, the most tangible, concrete elements have been the first to be implemented. These elements include the following:

- the 25-book campaign and principal's book of the month
- the *Writers' Workshop* and *Ramp-up* curricula
- focus walks and weekly leadership team meetings
- standards-based student work on walls in classrooms and halls.

To fulfill the promise of AC as a comprehensive design, not just a set of discrete interventions, some staff requested more professional development and clearer expectations for implementation. ALA staff respondents expressed solid support for the AC ideas and model but equally widespread frustration with the amount, specificity, and quality of support provided. Almost all staff had actively sought the chance to work in an AC school, but that initial buy-in was reportedly at risk of turning into cynicism and frustration. A coach put the case this way:

“America’s Choice needs to give us a tighter vision for rollout. At this point, it is not a methodical program—just an infusion of best practices. They are all good ideas, but we need much more on where/how to start. As it has been implemented here, it requires a lot of development at the school level, and with everything else going on in this building, that just hasn’t happened. They have something good to offer, but they need a very clear plan for how to put it in place. Any progress we have made has been on our own, not due to their support. We have used their rubric as a map, but how we should roll out is not clear. It is not a lost cause, but it really needs tighter leadership from the District. I need someone from central to say: Our district is moving in this direction—how does AC connect? I think the writing and public accountability pieces could really contribute. We have increased the level of rigor in writing, and the focus walks have strengthened the implementation of all our programs. They are key for accountability. They give you a methodical approach to get data for the leadership team to plan PD, a process to reflect on implementation that connects everything back to the classroom. I like the process and the ideas. The disconnect with AC is a lack of specific implementation expectations.”

Similarly, a principal summed up implementation progress this year:

“I’m happy to be an ALA and like the AC model, but we needed much more PD to be able to do this... need much clearer expectations for implementation. Implementation has only worked here because my coaches had prior experience. Otherwise, ‘rituals’ and ‘routines’ are just buzzwords.”

Section 5. Issues Affecting Implementation and Sustainability of EFA

Implementation and sustainability of EFA depended on how roles and responsibilities of key staff were defined and carried out

- ▣ Coaches
- ▣ Principals
- ▣ Central office staff
 - Professional development

RAND

As was mentioned earlier in this document, key district staff—coaches, principals, and central office staff—provided support, monitoring, and accountability for the implementation of EFA. Additionally, central office staff played a key role in providing professional development. We discuss each of the three groups relevant to the implementation and sustainability of EFA separately in the pages that follow.

Coaches were reported to be supportive of EFA but were less effective when their role was not focused on instructional improvement

- ▣ 26 of 28 coaches (93%) in 16 schools were reportedly valued by teachers and principals as resources
- ▣ In all schools: coaches mediated rollout of new programs and transferred PD. In most schools: coaches were also key players in data use and co-instructional leaders
- ▣ Coaches performed a long list of roles within the school
 - Principals are key to protecting the integrity of the coaches' role
- ▣ However, 1/3 of coaches in our sample faced significant distractions from their core role of developing instructional capacity
- ▣ For maximum impact, coaches reported that coach PD needs
 - more differentiation by experience
 - more focus on practical how-to's of partner programs and how to train teachers

RAND

With all of the new programs and expectations being rolled out in the 2006-07 school year, school-based curriculum coaches were seen as vital resources by both their principals and their teachers. Twenty-six of the 28 coaches (93 percent) in the 16 schools in our sample were valued as resources by the teachers and principals with whom they worked.

In all of the schools included in our sample, coaches were responsible for mediating the rollout of the programs. Teachers reported that coaches were an accessible source of answers and ideas about how to put the various partner programs in place. A teacher noted:

"Having coaches in the building is a tremendous increase in support. They model lessons, co-plan, find resources, [are] good at connecting expectations across the grades. It makes me feel very comfortable if I am unfamiliar with a topic."

Another teacher described the coaches' role in professional development this way:

"In the past, we were given handout after handout, workshop after workshop. This year, having a coach really brings it to life at the school level, helps translate it, demonstrate it. It is so much more concrete. The coach is really the mediator of instructional leadership who bridges the gap between the central office and us. They take things from theory to practice."

In most schools included in our sample, principals reported that coaches were partners in instructional leadership, particularly planning and delivering professional development. One principal described her coach as *"my key resource in monitoring implementation. . . . I can't imagine [that] we'd be as successful without her. She has been critical in the transition to differentiated instruction."*

Coaches and their constituents reported a wide variety of roles. Some of the roles reported in our sample include the following:

Working with teachers

- Transferring and managing the new curricula
- Supporting differentiated instruction
- Providing resources for and training in data use
- Mentoring teachers, especially new teachers
- Providing PD to staff
- Sitting in on and/or leading grade team and content area meetings
- Modeling in the classrooms when needed
- Locating material and other resources for teachers
- Planning interventions for struggling students.

Working with the principal

- Planning and providing site-based PD
- Managing and monitoring implementation
- Facilitating cross-grade coherence
- Serving as a liaison between schools and partners
- Selling the District's message
- Distributing information to staff.

Given the length of this list, it is not surprising that some coaches struggled during Year 1 to define their roles for themselves and their constituents. IFL coach training received wide praise for helping coaches focus their role on the tasks most central to instructional improvement. As one coach reported, *“The IFL training was extremely valuable in figuring out my role. It used to be coaches just got training in specific components to pass on like ‘train the trainer.’ This is a much more detailed and comprehensive way to think about site-based PD. . . . like how to use things like learning walks, study groups, data, model lessons to develop your staff. It gives me concrete ideas and a general sense of how my job should look.”*

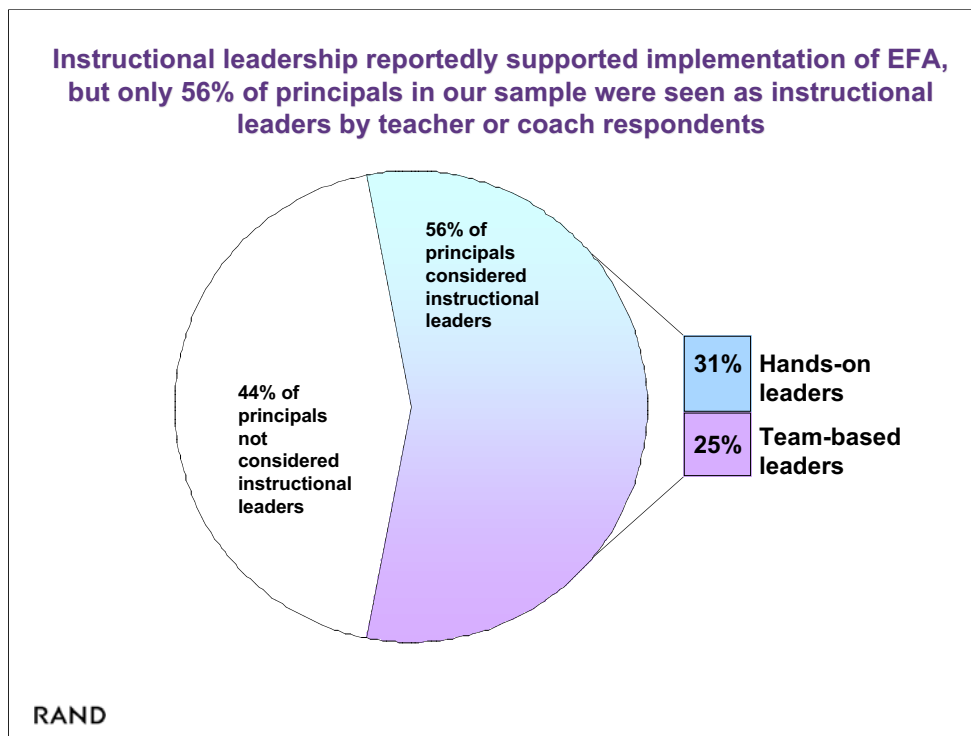
For coaches with the right experience and training, working with teachers on instructional data use proved particularly central to the role.

Although the role's focus on building instructional capacity was becoming more clear to coaches and teachers, a third of the coaches in our sample were frequently pulled away from that role for other tasks including

- covering classes

- working directly with students
 - doing group work with differentiated instruction
 - facilitating differentiated instruction by working with a group of students
- Doing paperwork (e.g., with IEPs)
- communicating with and supporting parents
- dealing with discipline issues
- administering student assessments
- “just filling the needs as they arise.”

The temptation to use coaches to work with small groups of students appears to be particularly strong. Clarity on whether this is an appropriate use of coach time is needed from the central office. Principals are the key to protecting the integrity of the role. Posted coaching schedules may also make the boundaries of the role more clear for all involved.



According to staff, principals' time was largely consumed with discipline, paperwork, dealing with parents, and school-building management issues. Indeed, during data collection, one 45-minute interview with a principal was interrupted eight times for the principal to either discipline a student or speak with a parent who had been called in to take a suspended student home. The reality that principals have competing roles within their job description has been documented in the literature (Archer, 2004; Grubb & Flessa, 2006). Within the past few years, the additional role of instructional leader has also been emphasized among principals' responsibilities (Stein & Nelson, 2003; Tillman, 2005). Similarly, instructional leadership is a core driver of the Excellence for All initiative. We asked all school-level interviewees—principals, coaches, and teachers—what effective instructional leadership looks like. For coaches and teachers, we compared their description of effective instructional leadership with their descriptions of their current principals' leadership practices. This comparison revealed that 44 percent of the 16 principals in our sample were not exercising what their staff viewed as effective instructional leadership. In all of these cases, principals were reported to be focusing on traditional administrative and management responsibilities. Some of their staff questioned whether principals have any choice in the matter. When one teacher was asked about the principal's instructional leadership, he laughed.

"When is the principal supposed to be able to do that? They are good at what they do—running the building. As far as instructional leadership, making sure teachers get the PD they need is the main thing."

The two major reasons why principals were not seen as instructional leaders were (1) competing roles/time demands and (2) lack of skills/knowledge/credibility. Of the principals who were viewed as effective instructional leaders, two models emerged, with some operating under a more hands-on model and others using a more team-based model in which coaches and experienced teachers did more of the actual delivery of PD, modeling, observing, and feedback. Some attributes were seen as core for any instructional leader to be effective. For examples, staff reported that effective instructional leaders *must*

- communicate a vision
- structure and protect time for staff learning and collaboration
- use in-house expertise
- have knowledge of student data.

Additionally, the hands-on leaders tended to take a more personal, direct role in the following tasks:

- modeling instruction
- leading PD
- using student data with teachers
- demonstrating in-depth knowledge of content.

One principal who was seen as demonstrating the hands-on model described the approach this way:

“I need to be out in classrooms—students and teachers need to know I am interested in what they are learning. Discipline and paperwork call, but I have to get out there and do it, model instruction, lead PD. They need to know I can show them.”

Based on a synthesis of the responses from our respondents, hands-on leadership seemed to be more feasible in smaller, less complex schools, primarily K-5 schools.

Team-based leaders, on the other hand, tended to delegate tasks, such as modeling instruction, leading PD, using student data with teachers, and demonstrating in-depth knowledge of content. Team-based leadership was seen as a smart, effective approach by many staff interviewed in schools in which principals used that approach and was appreciated as recognizing the professionalism and expertise of other educators in the school. An instructional teacher leader (ITL) described an effective principal as focused on the vision and effective in delegating:

“He knows the curriculum, oversees, but delegates. He communicates the overall vision through PD and establishes core goals for behavior and achievement, common expectations, and then develops a process where everyone is working together to get from A to B.”

Another team-based principal was described by a coach in the school as being

“in charge of all learning in the building, teachers’ and students’. Most important, he keeps leadership meetings focused on instruction, creating time for grade level and content area team meetings, identifying and following up on PD needs. Using the instructional experts in his building.”

One very consistent theme was that a good instructional leader knows how to work within the system to get his or her staff the resources they need—most important, professional development and the time to work together. Using the schedule to create and protect time for site-based teacher collaboration was one of the most valued actions an instructional leader could take, according to our respondents.

Concerns about unrealistic expectations for principals as instructional leaders were common among respondents

Challenges to instructional leadership

- ▣ All principals face significant competing role demands → “running the building”
- ▣ Some also lack specific knowledge of content and pedagogy
- ▣ Unrealistic/unclear expectations may breed cynicism about the concept
- ▣ Effective instructional leaders recognize the realities of time constraints and capitalize on team-based expertise
- ▣ Principals and their staff need clarity on which functions are core expectations

RAND

All of the principals in our sample saw themselves and were seen by their staff as facing constant challenges to operating as instructional leaders, particularly because of the pressing day-to-day issues of discipline and running the building. As is often the case, these immediately urgent demands tended to crowd out instructional leadership, recognized as important but often less pressing. In some cases, staff felt that their principals focused on administrative and management roles because of a lack of comfort with the specifics of content and pedagogy. Based on principals' reports, this perception may have been exacerbated by unclear expectations about the depth and breadth of content knowledge that an instructional leader is expected to have. If principals have the impression that they should be able to model lessons in all content areas in nine grade levels, they may retreat to their comfort zones. In the face of what some staff perceive to be unrealistic expectations about the amount of time and expertise principals have to act as “instructional leadership,” the term was reported to be at risk of degenerating into a buzzword. According to principal respondents, clarity from the District about what is expected from “instructional leaders” might alleviate some of the pressure. In particular, clear signals that team-based instructional leadership was reported by some District staff to be an effective strategy and specific models for how to do it could make more principals comfortable with the idea that instructional leadership is an achievable goal. Emphasizing team-based leadership has the additional virtue of maximizing the significant investment that the District is making in coaches by providing clear role expectations for how principals and coaches can work together.

Central office reportedly supported implementation of EFA, but school staff suggested improvements

- ▣ Increased expectations have been balanced with increased support from the central office
- ▣ Expectations and accountability have been clearer for curriculum than for the pedagogy and data use
- ▣ Staff respondents requested more
 - opportunities to inform district of implementation problems
 - input into decisionmaking regarding the initiatives
- ▣ Staff respondents suggested
 - PPS capitalize on knowledge and capacity built through past initiatives
 - best practices used in individual schools be disseminated through District PD

RAND

In general, school-level staff perceived improvements in central office openness and accountability under the current administration. A principal reported that

“they have streamlined services to be more customer friendly. Before Mark Roosevelt, there were always lots of layers. You could never talk to the right person. Now you can get answers to questions. They understand the function of central office to support, not direct, and they have been much more responsive.”

In a similar vein, an experienced coach noted that

“[central office staff members] are taking a more professional approach... using data, holding people accountable, protecting schools from school board micromanagement.”

Although the openness and responsiveness were valued, many staff argued for improvements in strategic reform management and for communicating the overall vision more clearly to the school-level staff. Specifically, staff respondents said that a more clearly specified implementation timeline would allow PD and allow staff to focus on getting things solidly in place and then building on success. Many staff

respondents also noted that it is critical to specify how partner interventions should be balanced, what gets rolled out first, how time should actually be used in the classroom, and how staff will be held accountable for implementation. Such a timeline might help alleviate some of the sense of too much being dumped on the schools too quickly. Of the elements of managed instruction, school staff respondents reported clearer expectations and accountability for implementing concrete new curricula and assessments. Messages about changes to pedagogy and about using the data produced by the new assessments to tailor instruction were seen as vague and less likely to have a clear accountability mechanism. Not surprisingly, teachers focused more on rolling out the new curricula and tests that were put in their hands. This situation is not unique to Pittsburgh. A 2006 RAND study on the implementation of comprehensive school reform models (Vernez et al., 2006, p. xviii) had a similar finding across a much larger set of schools and models: While schools were generally able to implement the prescribed curriculum of their adopted model, they had more difficulty in following guidelines about instructional practice and grouping students by performance.

On a related note, numerous examples were cited by respondents of ways that the current reform has missed opportunities to build on past instructional improvement efforts in the District. Experienced staff cautioned that the central office should not feel the need to start with a clean slate. There was some skepticism about the amount of money being spent on what appeared to respondents to be familiar best practices in new packages. Specific past initiatives mentioned that might be leveraged to strengthen EFA included

- prior AC implementation
- Reading First* (particularly the training these coaches have received on differentiated instruction and the components of effective reading instruction)
- the Western PA Writing Project.

Finally, while recognizing and valuing improved communication between schools and the central office, staff continued to express the desire for more input into rollout and more inclusive discussion on addressing challenges. Respondents also suggested that additional time be allotted

to voice suggestions and hear responses from the central office. At the same time, requests were made for additional opportunities to provide anonymous feedback on the EFA components and issues in the District. Next, many respondents asked for an increased level of visibility of central office staff members at meetings and teacher in-services as well as an increase in executive directors' (EDs') visibility in schools. Celebration and acknowledgement of short-term wins/successes were also needed. Finally, interviewees requested more support for external challenges related to family and neighborhood issues that their students face.

Staff perceive increased value of PD, but changes may be needed to maximize the investment.

- ▣ Staff reported a significant increase in quality and quantity of PD for all staff groups compared with training before EFA
- ▣ Teachers wanted deeper training on classroom how-to's, especially data use and differentiated instruction
- ▣ Respondents suggested that school-based professional collaboration may support and sustain classroom transfer
- ▣ Coaches and principals reported that they could motivate but not require attendance to training sessions

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Viewed from the school level, one of the most notable features of EFA was that increased expectations were generally balanced with increased support, particularly professional development to build staff capacity and site-based coaching to help transfer innovations to the classroom and sustain them. As a principal noted, *“They are no longer asking us to do things without providing appropriate PD. It used to be more drive-by PD. Now it is much more organized and aligned.”* An experienced teacher said,

“I see the District making a concerted effort to provide a lot of PD. If you have the need, the opportunity is there. They are optional, but they pay you! That is a real shift in the quality and quantity of PD, and they are doing a much better job letting you know what resources are there.”

Although most staff respondents viewed EFA as having a strong foundation of PD in Year 1, they made the following consistent suggestions for PD going forward to ensure that training gets transferred and sustained in classrooms. These suggestions included placing less emphasis on the content of the curricula and more on concrete models of how to implement the initiatives in the classroom. Additionally, respondents consistently requested more-specific training on how to use assessment data and how to plan and implement differentiated instruction. In addition to content suggestions, staff respondents consistently suggested that the central office staff and principals should structure more time for school staffs to work together on implementing new curricula and instructional practices.

A further suggestion was unique to respondents from ALAs: Some ALA staff argued that if they are expected to implement more partner interventions, they need more PD. As a coach put it, *“It is not fair to do half and half. Our teachers always want to know what they are missing. If I were running the world, the ALAs would get all the District PD plus more from AC. I assumed ALAs would have more professional learning time.”*

The final comment, repeated by many coaches and principals, expressed the concern that some teachers who needed PD the most were the least likely to receive it because they were not attending the optional sessions. Coach and principal respondents commented on their inability to do more than suggest and encourage staff to attend PD. But since the sessions were not required, encouragement may not be enough.

Section 6: Summary of Key Findings

Summary of Key Findings

Research on comprehensive school reform suggests that three to five years are required for full implementation and significant achievement impact (Berends, Bodilly, Kirby, 2002). In the PPS, the first-year implementation of EFA saw many challenges, but no more than might have been expected given the ambitiousness of the initiative. To the contrary, despite the aggressiveness of EFA's implementation schedule and the inevitable first-year challenges, we saw signs of promise. Below is a summary of our findings by research question.

Question 1: What were principals', coaches', and teachers' perspectives on the primary elements of each partner's intervention?

- ▣ Respondents reported increases in differentiated instruction—at least in grades K-5—have been a major Year-1 success
- ▣ The Macmillan curriculum, AC framework, and Kaplan data have all provided useful, concrete support according to interviewees
- ▣ Other parts of the partner's services/materials require attention

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Question 1: What were principals', coaches', and teachers' perspectives on the primary elements of each partner's intervention?

According to interviewees in our sample, promising progress was made in Year 1, but further improvements are needed with regard to implementation of each partner's intervention. In some instances (particularly with respect to Kaplan), course corrections bear some urgency, but we saw no reason to believe that such corrections could not be made. Several of the partners' products and services were reported as providing useful, concrete support for EFA. Those that rose to the top, according to teachers and principals, were the Macmillan curriculum, AC's framework, and Kaplan's data assessment tools. IFL's services, frequently reported as useful by principals and coaches, were, by design, not a focus for implementation at the classroom level at the time of our interviews. Implementation of IFL's Principles of Learning was planned to be more visible in the coming year. Additional partner-specific details can be found in Section 4 of the documented briefing. Additionally, respondents frequently spoke of reform components in isolation, suggesting limited understanding of how the pieces of EFA worked together to reinforce the overall agenda of improving academic achievement.

Question 2: What was the level of implementation and staff buy-in?

- ▣ 100% of teachers in the PPS database scanned Kaplan weekly assessments
- ▣ 86% of teacher respondents in our sample reported an increase in differentiated instruction using Macmillan
- ▣ 90% of teacher respondents reported using Kaplan materials and that Kaplan materials were inadequate
- ▣ 72% and 100% of teacher respondents reported pacing was too fast for curricula from Macmillan and Kaplan, respectively

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Question 2: What was the level of implementation and staff buy-in?

As was expected, the level of implementation and buy-in varied by partner. The specifics for each partner can be found in Section 4. Overall, our findings were consistent with the adage “what gets measured, gets done,” and 100 percent of the teachers using Kaplan administered the weekly assessments to their students according to the District’s centrally collected data. Additionally, 86 percent of elementary teacher respondents reported an increase in differentiated instruction using Macmillan, i.e., targeting instruction to the varying needs of different students in their classes. These findings are important indicators of implementation of the EFA initiative, since assessment and differentiated instruction were reported to be emphasized by the District in Year 1. (Teachers in middle- and high-school grades reported smaller increases in differentiated instruction, leaving room for additional inquiry into the factors that may have inhibited differentiation in middle- and high-school grades.) However, these numbers must be taken in the context of other findings that suggest room for improvements. For example, while 90 percent of our interviewed teachers reported regularly using the Kaplan materials, 90 percent also reported that the Kaplan materials were inadequate. Similarly, 72 percent and 100 percent of the respondents using curricula from Macmillan and Kaplan, respectively, reported that the pacing requirements necessary to maintain the assessment schedules were too fast. Further, many of our interviewees expressed concerns that materials were being covered too quickly for their students, time was not provided for reteaching as necessary, and that material was not being covered thoroughly enough because of the pacing guidelines.

Question 3: What issues may have affected the implementation and sustainability of the District's Excellence for All strategy in its entirety?

- ▣ Coaches, principals, central office staff, and District-directed PD were supportive levers of EFA, but need further definition and alignment
- ▣ Teachers largely (not entirely) satisfied with PD on curriculum content. Teachers want deeper training on classroom how-to's, especially data use and differentiated instruction
- ▣ Teacher respondents reported a need for more applied training on classroom implementation

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Question 3: What issues may have affected the implementation and sustainability of the District's Excellence for All strategy in its entirety?

Coaches, principals, central office staff, and professional development appear to be supportive levers of the overall EFA effort, but these levers need further definition and alignment according to respondents. Our evidence supporting this claim includes the fact that principals and teachers emphasized the importance of coaches for supplementing PD provided by the partners and the District. For example, coaches were reported to be critical to deepening and institutionalizing the changes supported through EFA. We were frequently told by principals and teachers just how important coaches were for bridging the gaps in the PD provided to teachers, clarifying the practical use of materials, and providing tailored instructions for using the materials. At the same time, coaches reported a need for their role to be clarified and articulated clearly to principals so that they are not asked to perform functions that take time from their key roles of supporting the implementation of EFA.

Additionally, our examination of instructional leadership revealed room for improvement—just over half (56 percent) of principals in our sample were considered instructional leaders by their teachers and coaches. For the 56 percent of principals reportedly demonstrating instructional leadership, our

examination revealed two forms of effective instructional leadership currently at work in the PPS—*hands-on* and *team-based* instructional leadership. As the terms imply, principals who demonstrated hands-on instructional leadership tended to take on each of the tasks themselves. Principals demonstrating team-based leadership delegated responsibility for some of the instructional leadership roles to coaches and teacher leaders, capitalizing on the strengths at the school. Both hands-on and team-based approaches were reported to be respected by teachers and coaches as effective, and currently we have no reason to view one model as more effective than the other.

Staff respondents valued the central office for supporting implementation but had suggestions for improving the services provided by the central office. Their suggestions included strategies for the central office to optimize planning time for staff and ideas for showcasing best practices from across the District.

Teachers in our sample were largely, though not entirely, satisfied with PD on curriculum content. However, many respondents reported a desire for deeper training on classroom how-to's, especially data use and differentiated instruction. Respondents also reported a need for more applied training on classroom implementation. Additional information on issues that may affect implementation can be found in Section 5.

Section 7. Recommendations, Conclusions, and Epilogue

Recommendations for strengthening implementation in Year 2

- ▣ Focus on the practical application of differentiated instruction in the classroom
- ▣ Target more professional development on data use to support the use of tools
 - Targeted PD
 - Site-based support
 - Dissemination of existing best practices and tools
 - Clear accountability for use
- ▣ Build on existing coach networks to:
 - Disseminate best practices
 - Create cross-district consistency
 - Strengthen cross-district professional learning community.

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Recommendations for Improving Implementation in Year 2

Based on our findings, we are making the following suggestions to the PPS central office:

Provide PD that focuses more on the practical application of differentiated instruction in the classroom. School-level respondents suggested that the District could build on a strong start in differentiating instruction through providing PD that focuses more on the practical application of differentiated instruction in the classroom. This request was commonly referred to by teachers and coaches as the “how-to’s” for differentiated instruction. While we recognize the reported emphasis on differentiated instruction in Year 1 as a promising sign, we have concerns regarding whether teachers and coaches as groups and as individuals have the same definition of *differentiated instruction* as the PPS central office. In many interviews, teachers commonly referred to small group work or work stations when referring to differentiated instruction. However, simply introducing small group work does not ensure differentiated instruction is taking place. Further, this definition is qualitatively different than the idea of tailoring the tasks and focus of instruction to meet individual children’s areas of need, which actually could take place in a large or small group. The PPS central office is aware of the need for clarifying the definition of differentiated

instruction for staff and has discussed this issue. Once differentiated instruction is clearly defined, coaches might be asked to disseminate this information to teachers. In this case, “Learning Walks” might be useful; although it was determined that the lack of emphasis on Learning Walks in Year 1 of EFA implementation was by design, Year 2 could benefit from a push to implement Learning Walks as a means of monitoring differentiated instruction at the classroom level.

Target more professional development on data use. The data assessments and tools that support these assessments are reported to be valued by school-level staff. However, this documented briefing also suggests that use of these tools and assessments might become more widespread and more consistent across the District if professional development focused more on data use and less on computer program use, which was the focus of PD in Year 1 of implementation and which appeared to have been sufficient according to reports. Moreover, additional PD on data use in the context of the realities of time management, behavior management, and curriculum pacing requirements might be helpful for teachers. Further, coaches and teachers reported that site-based PD at the schools would afford personalized and targeted PD that teachers would be more likely to attend, with fewer barriers to accessing these sessions. Additionally, reports indicate that data were being used effectively in various pockets across the District; these effective practices could be communicated districtwide during PD sessions.

In our sample, the strategies and tools supporting data use were touted to be valuable assets for building capacity throughout the District and could be disseminated as best practices through coach networks and among staff during school-level in-services or planning blocks, if time were permitted for these types of professional community-building opportunities. Finally, staff requested clear standards for accountability for how they are expected to use data.

Build on existing coach networks to disseminate best practices, create cross-district consistency, and strengthen cross-district professional learning communities. Although more targeted PD for data use was a consistent refrain from teachers and coaches, data are reportedly being used effectively in various pockets across the District. Many of the coaches in our sample have developed strategies for unit planning and tools that encouraged or supported their teachers to use data more effectively. They also reported that they have shared their ideas or have received tips from other coaches through informal coach networks. The PPS might be able to build on those information networks as a means for building capacity throughout the District

and disseminating best practices. Strategies for facilitating coach networks and building planning time included providing contact information and setting up email “aliases” for coaches and providing some unstructured time for coaches to talk during in-service training sessions.⁴

⁴ In an interim briefing, we suggested to the central office that a clearer and more succinct description of coaches’ roles and the jobs that make up the position be established. In a subsequent PPS partner meeting involving PPS central office staff and representatives from the external partners, a completed draft of the coaches’ roles was presented that is to be refined and used in Year 2.

Recommendations for strengthening implementation in Year 2

- ▣ Build instructional leadership capacity through
 - promoting team-based leadership in addition to hands-on instructional leadership
 - continuing to invest in coaches
- ▣ Encourage principals to align coaches' tasks with their core roles
- ▣ Provide more school-based professional collaboration time built into the school year to afford sustainable transfer of information and practice into the schools and classrooms
- ▣ Ensure that all staff understand EFA as a coherent strategy:
 - Components are mutually reinforcing
 - Connections and consistency are present across partners

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Build instructional leadership capacity through promoting team-based leadership in addition to hands-on instructional leadership and an investment in coaches. In our sample, only about half of the PPS's principals were considered to be instructional leaders by their teachers and coaches. At the same time, there is a strong undercurrent of cynicism as to whether it is possible to perform the tasks of managing the school building and serving as the school's instructional leader simultaneously. The recognition of the numerous time-intensive responsibilities of principals is not uncommon and has been documented in the literature (Archer, 2004; Grubb & Flessa, 2006). A response to this challenge appears to have sprung up organically within the PPS, namely in the two forms of instructional leadership mentioned earlier (i.e., *hands-on* and *team-based* instructional leadership). Although both models are currently utilized in PPS schools, there seems to be less knowledge about the viability and acceptability of team-based instructional leadership. Although the evidence supporting team-based instructional leadership is mixed, there is a growing literature that schools around the world are practicing team-based or *distributed leadership* in their schools successfully (Grubb & Flessa, 2006). Particularly, Grubb and Flessa (2006) found that when local school sites participated actively with the policy-making process that produced the team-based leadership arrangements, the alternative seemed viable. Therefore, we propose attempting to increase the percentage of principals effectively acting as instructional leaders by

promoting team-based instructional leadership. Since both models were reported as effective by PPS teachers and coaches, leveraging the in-house capacity within each school into a team that could effectively provide instructional leadership may be a time-efficient means to providing instructional leadership without a personnel change or the time lag necessary to allow the current principals to gain additional skills. Thus, principals would share the leadership work with others in their school, making the task less burdensome, while providing the instructional leadership needed in their schools. Additional capacity for instructional leadership can also be encouraged by continuing to invest in coaches so that they can continue to share instructional leadership responsibilities with their principals.

Encourage principals to align coaches' tasks with their core roles. A third of the coaches in our sample report being asked to perform functions that are outside of the coaches' roles. At the same time, the success of EFA relies heavily on coaches passing down the training they receive to teachers and facilitating implementation of the components of EFA. This role was reported to be time intensive. Any additional roles outside of those responsibilities took away from the time coaches devoted to their core responsibilities. Therefore, we suggest that principals should be given guidance from the central office on the roles that are within the scope of coaches' functions. Principals should also be encouraged to support coaches in fulfilling functions that are core to their roles, rather than assigning other tasks that may be useful to the school but not germane to the coaches' core functions. Further, we recommend that principals be given the charge of ensuring that coaches are provided with consistent blocks of time to work directly with their teachers.⁵

Provide more school-based professional collaboration time built into the school year to afford sustainable transfer of information and practice into the schools and classrooms. As a group, school-level staff in our sample valued the Districtwide in-services and PD provided in support of EFA. Even still, many in our sample expressed the need for time to meet at the school-building level for training more tailored to their needs. Additionally, school-level staff requested time to work within grade- or subject-level teams to build more professional community at the school level. Efforts at both the District-administration and school-leadership levels are

⁵ In an interim briefing, we suggested to the central office that a clearer and more succinct description of coaches' roles and the jobs that make up the position be established. In a subsequent PPS partner meeting involving PPS central office staff and representatives from the external partners, a completed draft of the coaches' roles was presented that is to be refined and used in Year 2.

necessary to develop workable time management strategies for this type of effort. More school-based collaboration time does not necessarily mean additional time away from students or outside of the contracted professional year. On the contrary, strategies may include adjusting teachers' schedules within grade level or subject area so that common planning periods are created. Additionally, time slotted for Districtwide PD may be better spent in individual schools. These school-level PD sessions could be made consistent across the District by determining a particular subject that would be addressed Districtwide within individual school-level learning communities.

Ensure that all staff members understand EFA as a coherent strategy. As we state repeatedly in this document, the EFA initiative is an ambitious and complex undertaking. As such, we recommend that the District clearly explain the components of EFA as a coherent strategy, which will help generate buy-in to the separate components. For example, district staff should explain to school staff the ways in which EFA's components are mutually reinforcing and should describe the connections and consistency across the services and materials associated with the external partners.

Conclusion

The Pittsburgh School District's Excellence for All initiative exemplifies the ambitious efforts that are taking place in districts across the country that aim to improve student achievement using managed instruction—i.e., coordinating curriculum, pedagogy, and assessment district-wide, often with the aid of external partners. These data represent a collection and synthesis of the ideas discovered during discussion with the PPS's principals, coaches, and teachers. The results provided by this study should serve as foundational information for identification of the critical issues, friction points and areas of concern. As expected, there have been challenges to overcome and adjustments to make as the PPS and its partners work to establish the proper balance in the services and materials necessary to catalyze improvements in PPS students. Some of the challenges will work themselves out by virtue of Year 2 being the second time the materials will have been in use. Other issues will require considerable adjustment so that Year 2 will be smoother than Year 1.

Our role was to generate the questions, systematically collect responses, and synthesize those disparate ideas and sentiments into suggestions and recommendations to improve implementation in Year 2. As such, we hope that these findings will serve to confirm or disaffirm anecdotal accounts as well as potentially provide some solutions to issues that may not have made their way up the chain of command to PPS central office personnel.

Epilogue

Subsequent to this briefing as well as based on other feedback from teachers, coaches, and principals throughout the year, the District has made a shift in some of its initial plans for implementing EFA (Smydo, 2007). These steps include cutting almost a quarter of the budget from the \$8.4 million Kaplan contract and using those funds to pay district teachers to do some of the work to write curricula. Portions of those cut funds will also be used to hire the Institute for Learning to work with the teachers writing curriculum and provide other nonspecified services. Next, the District will provide stipends for continued work of the teacher feedback committees that contributed to concerns about Kaplan's contribution to EFA and for additional teachers to critique Kaplan's benchmark tests, presumably for alignment to state standards and internal consistency. While its role is being reduced, it was reported that Kaplan will still make important contributions to EFA. According to the *Pittsburgh Post-Gazette*, central office staff reported that these changes would “enable the District to develop a cadre of curriculum writers and better link curriculum writing and teacher training.”

**PPSPE: Phase II Interview Protocol: Project Description
Narrative (to be presented in scheduling call)**

The Pittsburgh Public School district has asked RAND to evaluate the implementation of a subset of its reform initiatives in its schools.

The RAND Corporation is a nonprofit institution that helps improve policy and decisionmaking through research and analysis. Our mission is to bring accurate data and objective analysis to policy.

This evaluation is being funded by the Funds for Excellence, a consortium of local Pittsburgh foundations.

As you know, the district has contracted with various external vendor organizations to partner with it to provide or support a host of educational interventions intended to improve student outcomes. These interventions include

- creating benchmarking instruments
- providing instructional leadership and staff development
- developing curriculum
- providing guidance for comprehensive school reform.

The district is planning to determine its success based on improvements in student achievement in 2008. In the meantime, the district requested that RAND conduct a formative evaluation looking primarily at implementation of the contracted services.

The partners whose interventions are being assessed include

- Kaplan K12
- America's Choice (Accelerated Learning Academies)
- Institute for Learning
- Macmillan-McGraw Hill.

For this evaluation, we will be looking at “fidelity of implementation”—or how closely the program is being implemented to the way it was designed—as our marker for program quality.

Our approach includes a combination of investigating (1) delivery of the contracted services and (2) district staff implementation. These factors are being studied through

- reviewing contracts between the district and the partner agency
- observing partner-related conferences, meetings, and/or training sessions that occur during the project period

- semi-structured interviews with key personnel from the PPS and the partner organizations, which is what I am asking you to participate in if you agree.

Interviewees for this project include

- executive directors
- partner personnel in the District
- partner administration personnel
- principals
- coaches
- teachers.

Your participation in this interview is completely voluntary. You do not have to participate in the interview, and even if you initially agree, you can stop at any time for any reason. Your participation or nonparticipation will not be reported to anyone.

CONSENT LANGUAGE (AT TIME OF THE INTERVIEW)

Thank you for agreeing to speak with me. First, I need to give you some information and get your consent to participate in this interview.

- Participation in this interview is voluntary. You do not have to participate, and you can stop at any time for any reason.
- Your participation or nonparticipation will not be reported to anyone.
- You should feel free to decline to discuss any topic that we raise.
- This study is funded by the Funds for Excellence, a consortium of local Pittsburgh foundations. And it is being conducted by the RAND Corporation, a nonprofit institution that helps improve policy and decisionmaking through research and analysis. Our mission is to bring accurate data and objective analysis to policy.
- RAND will use the information you provide for research purposes only and will not disclose your identity or information that identifies you to anyone outside of the research project, except as required by law.
- No one, except the RAND research team, will have access to the information you provide. All research team members (five people) who have access to identifiable data have signed a confidentiality agreement.
- We will only report responses in the aggregate, e.g., 30 percent of the teachers we interviewed held a particular opinion.
- We will destroy all information that identifies you after the study has concluded.
- Do you have any questions about the study?
- Do you agree to participate in the interview?

PPSPE: Phase II Interview Protocol: Principals/Coaches

- (1) From your perspective, how would you describe the district’s **overall approach** to instructional improvement (under Excellence for All)? What are the key actions the district is taking and investments it is making to improve teaching and learning?
- *If they don’t mention the term themselves:* We’ve heard the approach described as “managed instruction.” What does that phrase mean to you? What are the key elements?
 - *After they have responded unprompted, show our diagram with consistent curriculum, formative assessment, and proven pedagogy.* We’ve heard managed instruction described as looking something like this, with the following three components...then for each:
 - o What should that look like at the school level? Is anything different this year in how your school is doing (x)?
 - o Have you or your staff had any PD on that? From whom? How useful was it?
 - o What kind of ongoing support are you getting in that area? From whom?
- (2) What do you see as **your role** in the district’s overall instructional improvement plan?
- Whom are you accountable to and what does that accountability consist of? Who is accountable to you? To what extent are you expected to be monitoring implementation of the reform? What are you looking for to see that implementation is occurring in your school’s classrooms?
 - What are the biggest challenges you face in your role in supporting the rollout of these reforms?
 - *Coaches only: What are the key elements of your job description—in theory, in practice?*
 - *Coaches only: How do you go about using/transferring what you have learned in PD in your work with teachers? How much time do you spend working with teachers in a typical week and in what formats (leading formal PD, facilitating teacher planning, co-teaching or observing in classrooms)?*
- (3) I’ve heard a lot about the idea of **“instructional leadership.”** What does that term mean to you?
- Who in this school acts as an instructional leader? How specifically is that leadership exercised—can you give me some examples or situations?
 - What are the relative roles of principal, other administrators, coaches, and ITLs in exercising instructional leadership?
 - Has your work with the IFL changed how you think about and/or practice instructional leadership? Are there any specific ideas from the IFL being put into practice at this school (for example, Learning Walks)?
 - What percentage of your time would you estimate you are actually able to devote to instructional leadership in an average week given your other job responsibilities? What are you doing during that time?
 - What kinds of training, support, or policy changes would help you exercise instructional leadership?

- (4) The district has brought in a number of **external providers** to support this MI approach. Which ones have you and your staff worked with?
- *If they fail to mention one they should be working with, prompt:* What about (x), how do they fit?
 - Then for each:
 - o What services (including PD), materials, and ongoing support have you received from (x)?
 - o How useful have those services and materials been at the school level?
 - o Are there aspects you particularly value that have strengthened your work here?
 - o Are there aspects that have been particularly challenging to put in place?
 - o How do the programs from the various providers fit together?
 - *ALAs only:* What is different this year because this is an America's Choice school (apart from the other pieces)? How does America's Choice fit into the overall approach/with the other providers?
- (5) We've talked about how the managed instruction approach is supposed to work in theory— now let's talk about how it is **actually unfolding** this year at this school, recognizing this is the first year of a long change process. What if anything looks different about teaching and learning this year in this school?
- Where have your teachers gotten the furthest in implementing the planned changes?
 - What aspects of the work are you most excited about/do you feel have the most potential to improve student achievement?
 - What pieces are the toughest? What needs to happen to make them work?
- (6) I'd like to talk more specifically about the idea of **using data** to make instructional decisions. Has this school's use of data changed this year? If so, how?
- Have you and/or your staff had any specific training on data use? From whom?
 - Are any new data tools or resources available to you? How are they being received?
 - Who in this school uses data? For what questions?
 - *As appropriate, press on Macmillan and/or Kaplan assessments and data systems and their levels of use.*
- (7) It sounds like there are a lot of changes going on this year. What kinds of **feedback loops** are in place for issues that come up at the school level that need to be resolved? Whom do you talk to? Can you give me an example of a specific issue you faced and how it was handled?

PPSPE: Phase II Interview Protocol: Teachers

- (1) Tell me about the **new (Macmillan or Kaplan) curriculum** you are using this year. Compared with previous years in those subjects, what are you doing differently this year?
 - What is your view on the quality/clarity/comprehensiveness of the materials themselves?
 - What about the professional development that was provided to support the curriculum?
 - How useful are you finding the assessments (and data system) that come with the curriculum? Talk me through how you are using them in your own teaching.
 - What would you say are the strong points of this curriculum package?
 - Have there been any challenges in rolling it out? How were they handled?
 - How do the changes you are making this year seem to be impacting your students?

- (2) Would you say this new curriculum we've been talking about is just about **WHAT** to teach or have there also been changes this year in **HOW** the district expects you to teach?
 - What new messages have you been hearing about **pedagogy** and from where?
 - Are the messages you are hearing about pedagogy clear and consistent?
 - To what extent/how have you been able to put them in place?
 - Are you familiar with the Institute for Learning's Principals of Learning? If so, how were you exposed to those ideas and to what extent have they impacted your teaching this year?

- (3) *ALA's only: What is different this year because this is an **America's Choice** school (apart from the other pieces)? How does America's Choice fit into the overall approach/with the other providers?*

- (4) I've heard a lot about the idea of **"instructional leadership."** What does that term mean to you?
 - Who in this school acts as an instructional leader? How specifically is that leadership exercised—can you give me some examples or situations?
 - What are the relative roles of principal, other administrators, coaches, and ITLs in exercising instructional leadership?

- (5) What role do **coaches** play in this building?
 - How and how much have you interacted with them this year? In what ways have they supported the implementation of these reforms?
 - Do they have a role in monitoring the implementation of the new curriculum?
 - What is the role of the coach versus the ITL?
 - How could coaches be most useful to you?

- (6) It sounds like there are a lot of changes going on this year. What kinds of **feedback loops** are in place for issues that come up at the school level that need to be resolved? Whom do you talk to? Can you give me an example of a specific issue you faced and how it was handled?

- (7) *ITL's only: What is your **role as an ITL** in the changes we've been talking about? How do you define your role versus that of coaches?*

PPSPE: Phase II Interview Protocol: Curriculum Supervisors

- (1) From your perspective, how would you describe the district's **overall approach** to instructional improvement (under Excellence for All)? What are the key actions the district is taking and investments it is making to improve teaching and learning?
- *If they don't mention the term themselves:* We've heard the approach described as "managed instruction." What does that phrase mean to you? What are the key elements?
 - *After they have responded unprompted, show our diagram with consistent curriculum, formative assessment, and proven pedagogy.* We've heard managed instruction described as looking something like this, with the following three components
 - *Do these three components fit with your understanding of what managed instruction is supposed to be or would you add or change something?*
 - *Can you briefly describe how you see the district's key strategies/investments in each of these areas?*
 - *How do the various external partners that the district is working with fit into this? Which partners are working on which pieces and how?*

- (2) What do you see as **your role** in the district's overall instructional improvement plan?
- Who are you accountable to and what does that accountability consist of? Who is accountable to you? To what extent are you expected to be monitoring implementation of the reform? What are you looking for to see that implementation is occurring in your schools?
 - What are the biggest challenges you face in your role in supporting the rollout of these reforms?
 - What are the key elements of your job description—in theory, in practice?

After they have responded unprompted, show our diagram with district staff roles. Map what they have said back to the diagram.

- Is our assessment accurate?
- Do you have something to add or change on the diagram?

- (3) Which external partner's have you worked directly with?

For each:

- What is your sense of how implementation of that work is going at the school level?
- What have been the strong points of this partner's work?
- What have been the challenges?

- (4) It sounds like there are a lot of simultaneous changes going on this year. What challenges to implementation have you encountered or heard from staff in your schools? *After they have responded unprompted, show our diagram with partner conflicts. Map their concerns onto the diagram and discuss it to gain clarity on their perspective.*

Pick the issues relevant to the given interviewee and ask (as appropriate):

- In a case like the ALA's, where Macmillan (MMH) or Kaplan curricula are being used within an AC instructional framework, how does that work?

- What challenges have impacted your role?
 - What is the impact of this challenge in the schools?
 - What is the process for resolving these challenges?
 - Are there lingering issues to be resolved?
 - How are they being handled?
- In the rest of the schools where Macmillan or Kaplan curricula are being used within an IFL framework, how does that work?
 - What challenges have impacted your role?
 - What is the impact of this challenge in the schools?
 - What is the process for resolving these challenges?
 - Are there lingering issues to be resolved?
 - How are they being handled?

(5) How sustainable do you feel these changes are once contracts with external partners have ended?

In order for the changes to last, what are the key skills or capacities that various district staff need to develop:

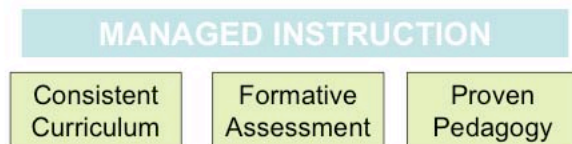
- teachers
- coaches
- principals
- district-level staff (including yourselves and the EDs).

What is the current strategy by the district and/or the partners to build those kinds of lasting capacities in district staff?

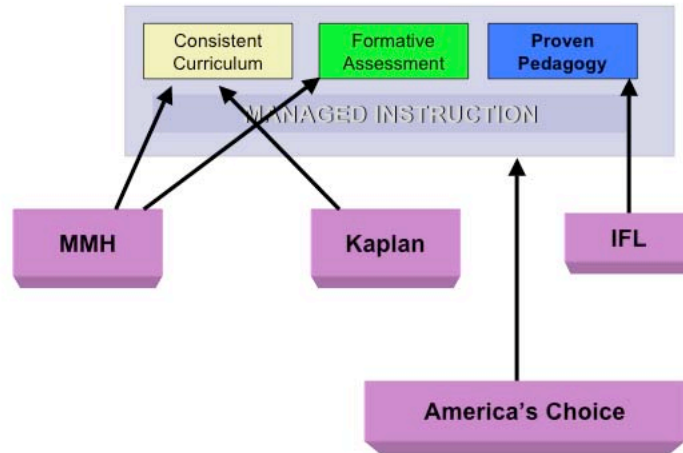
DIAGRAMS WILL BE ON SEPARATE PIECES OF PAPER WHEN PRESENTED TO INTERVIEWEES



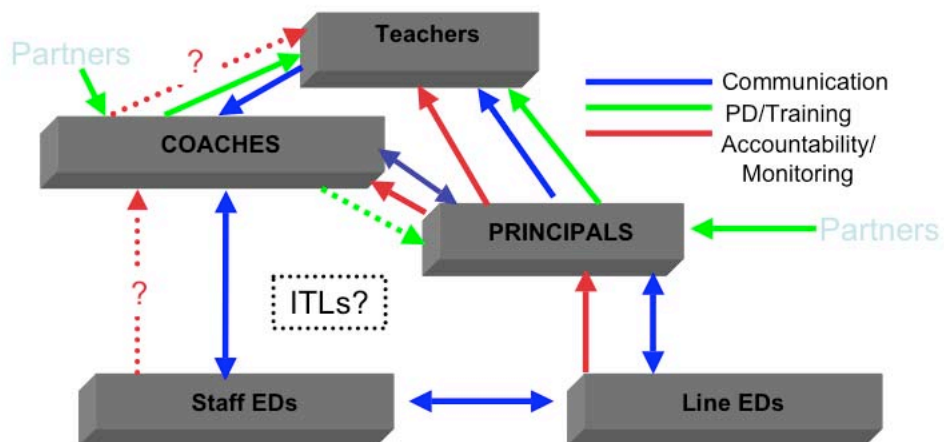
***PPS External Partners:
Diagrams to be used during Round 2
interviews***



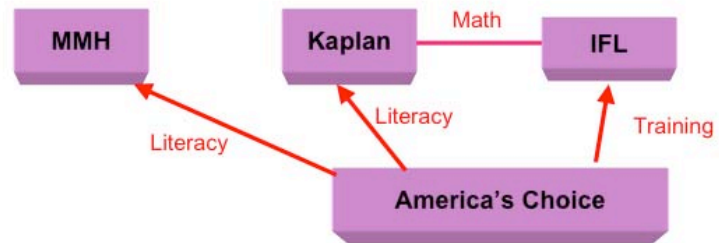
District Strategy: Partners' contributions to managed instruction



Mapping the district's strategy: Roles for district personnel in managed instruction



Weak links and friction points in partner linkages



Appendix B. Quantification of District Staff Survey Responses

| | r1 | | r2 | | r3 | | total | | total % |
|---|-----|-------|-----|-------|-----|-------|-------|-------|-------------|
| | yes | total | yes | total | yes | total | yes | total | |
| 1. What proportion of teachers reported “increase in small group work” with Macmillan? | 5 | 8 | 13 | 13 | 6 | 7 | 24 | 28 | 86% |
| 2. What proportion of teachers reported regularly using the Kaplan materials? | 13 | 15 | 1 | 1 | 4 | 4 | 18 | 20 | 90% |
| 3. What proportion of teachers reported using the Kaplan Achievement planner? | 10 | 15 | 1 | 1 | 3 | 4 | 14 | 20 | 70% |
| 4. What proportion of teachers reported that Kaplan materials were inadequate? | 14 | 15 | 4 | 5 | 1 | 1 | 19 | 21 | 90% |
| 5. What proportion of schools had conducted Learning Walks at the time of the interviews? | 1 | 4 | 1 | 4 | 0 | 7 | 2 | 15 | 13% |
| 6. How many principals reported a team-based leadership approach to instructional leadership? | 2 | 5 | 0 | 7 | 2 | 4 | 4 | 16 | 25% |
| 7. How many principals reported a hands-on approach to instructional leadership? | 2 | 5 | 1 | 7 | 2 | 4 | 5 | 16 | 31% |
| 8. How many principals were reported as not serving as instructional leaders for their buildings? | 1 | 5 | 6 | 7 | 0 | 4 | 7 | 16 | 44% |
| 9. How many coaches were reported to be valued by their teachers? | 7 | 7 | 7 | 7 | 12 | 14 | 26 | 28 | 93% |
| 10. How many schools were reported to have some routine process for looking at data? | 4 | 5 | 4 | 4 | 1 | 7 | 9 | 16 | 56% |
| 11. How many schools reported doing some kind of creative scheduling to create more site-based PD time? | 1 | 5 | 4 | 4 | 1 | 7 | 6 | 16 | 38% |
| 12. How many teachers reported difficulty with Kaplan pacing? | 5 | 5 | 1 | 1 | 15 | 15 | 21 | 21 | 100% |
| 13. How many teachers reported difficulty with Macmillan pacing? | 3 | 6 | 8 | 12 | 7 | 7 | 18 | 25 | 72% |

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