



# ***Success at the Core:*** **How Teams and Teachers Transform Instruction** **Design and Methods of the Pilot Evaluation**

**Prepared by Inverness Research**  
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Inverness Research is an independent educational evaluation group headquartered in Inverness, in the San Francisco Bay Area. We study national, state, and local initiatives aimed at improving education in formal and informal institutions. (See [www.inverness-research.org](http://www.inverness-research.org).) Education Development Center (EDC), part of the *Success at the Core* (*SaC*) development team, contracted with us to conduct an independent evaluation of *SaC*'s pilot, which took place in Washington State.

## **Purposes of the pilot evaluation**

The project's developers had two goals for the pilot evaluation. First, they wanted an independent assessment of *SaC*'s potential to achieve its long-term goal: middle school instructional improvement. They also hoped that independently gathered data could help guide improvements and revisions to the materials before widespread, public distribution.

## **Pilot participants**

The pilot involved 11 middle schools (all in different districts) and one district. Selection of the 12 pilot sites yielded a great deal of variation both in organizational contexts and in the characteristics of groups and individuals piloting the *SaC* materials. The following table provides information about context of usage, the configurations of school leadership teams that piloted the Leadership Development modules, and the content area focus of each teacher piloting the Teacher Development strategies.

Table 1. Characteristics of Pilot Participants

District size	Large (6 or more middle schools)	4
	Medium (3-5 middle schools)	4
	Small (1-2 middle schools)	4
Region of Washington <sup>1</sup>	West	9
	Central	2
Leadership Team configuration <sup>2</sup>	Middle school building leadership team with principal and teacher representatives	7
	Middle school teachers-only team	2
	Entire middle school faculty	1
	District instructional leadership team	1
Content area of teacher piloter	Mathematics	6
	English language arts/Social Studies	3
	Science <sup>3</sup>	2

## Evaluation criteria

Throughout the study, we at Inverness held the following five criteria in mind, both for formative feedback purposes and to assess the potential of the toolkit to achieve its purpose of supporting middle school instructional improvement.

- Quality of the materials: The quality of the overall design, the production quality of the videos, and the educational/pedagogical quality of the modules and strategies, including the research and knowledge base on which *SaC* is built.
- Relevance to targeted users: The extent to which *SaC* addresses the needs of middle school leaders and teachers, and the extent to which *SaC*'s topics and strategies are consistent with middle school leaders' and teachers' visions and goals for improvement.

<sup>1</sup> A middle school from the east side of Washington State withdrew just before the pilot began. The *SaC* materials themselves include videos and materials from schools in the eastern as well as western and central regions of the state.

<sup>2</sup> Because of last-minute changes in schedule and personal circumstances, one middle school included a pilot of the Teacher Development materials only, and another involved a pilot of only the Leadership Development modules. At all other sites, both the Leadership and Teacher Development materials were piloted.

<sup>3</sup> The third science teacher went on personal leave and withdrew mid-way through the year.

- Usability in school context: The user-friendliness of the web site, the usability of the on-line videos and other materials in middle school classrooms and meeting spaces, and the extent to which busy middle school leaders and teachers can fit *SaC* into their workplaces and workdays as professional development.
- Value for instructional improvement: The extent to which and the ways in which leaders and teachers can actually apply and adapt *SaC* ideas and strategies in their contexts, and the extent to which the materials foster a greater and more productive focus on instructional improvement.
- Impact: The extent to which and the ways in which use of *SaC* builds school leadership capacity, helps to promote and strengthen a collaborative professional culture, introduces changes into classroom practices, and produces positive changes in students' classroom experience and ultimately strengthens their learning.

### **Pilot activities**

Each pilot site designated a leadership team that would pilot the Leadership Development modules and appointed a facilitator for that team. In some schools, the facilitator was the principal (in the case of the district, a program coordinator). In other schools the facilitator was a teacher. Sometimes there were co-facilitators. Each site also selected a math, science, or English language arts teacher to pilot a sample of Teacher Development strategies. Some of these pilot teachers were members of the piloting leadership teams, and some were not. The district pilot teacher was in the district's novice teacher support group.

Leadership Development modules. Each leadership team facilitator reviewed available facilitation materials and participated in a one-hour, conference call orientation in August 2009. Then in the fall, researchers from Inverness Research visited each of the 12 pilot sites to gather data on the context of usage, including the existing improvement efforts at the school and district, and the plans for how *SaC* would complement these efforts. Starting in September 2009, each designated leadership team agreed to use three Leadership Development modules. First, all teams used the Leadership Teams and Quality Instruction module. Then, each team used two of the six topic modules. Most schools piloted two topic modules of their choice. However, we dictated the choice of one of the two topic modules to a few schools so that all six modules would be piloted at least twice.

Teacher Development strategies. Each teacher-piloter completed two tasks. First, each systematically reviewed four of the 24 strategies. Thus, all strategies were reviewed by two teachers. Then, each piloter selected two strategies and piloted them in their classrooms, in ways that they deemed fit. This self-selection resulted in classroom pilots of 16 different strategies, most by one teacher and a few by two or more. About half of these strategies were piloted in classrooms whose content areas differed from those featured in the materials.

### **Evaluation data and analysis**

The pilot evaluation was a qualitative study designed to capture nuances of three major dimensions of interest: the context of *SaC* usage, the nature of usage, and the outcomes or benefits of usage.

Early data gathering focused on context of use, starting with the initial site selection interviews in spring 2009 and continuing intensively through on-site visits in fall 2009. During site visits, we conducted in-depth individual interviews with the principal (for the district, the director of teaching and learning), the leadership team facilitator, and the teacher-piloter. We also conducted a focus group with the leadership team and observed the teacher-piloter's classroom. Data gathered included the following:

- participants' professional backgrounds and roles at the school
- nature and extent of current school improvement foci, work, and issues/challenges
- existing conceptions of quality instruction, the degree to which they are shared across the staff, and issues the staff faces in improving instruction
- environmental forces and other conditions that support or inhibit school improvement efforts (e.g., local and state policies, community issues, union and other professional issues, and staff retention/turnover)
- existing leadership opportunities, roles, foci, and practices for individuals and groups, as well as challenges associated with building leadership capacity
- existing character and collaborative capacities of the professional community
- existing professional development opportunities, practices, and issues
- the nature and content focus of resources, tools, and programs used at the school to support improvement, including staff's experience with on-line or video-based resources
- expectations, hopes, and concerns about use, value, and impact of *SaC* materials

During the months when the *SaC* materials were being piloted, we documented the piloters' experiences and their assessments of *SaC* through multiple in-depth interviews following the use of each module or strategy.

For the Leadership Development modules, we interviewed all facilitators. We also collected detailed logs from a leadership team member designated as a documenter and interviewed all documenters. To ground the self-reports, we also observed a sample of three teams in action. Data were gathered on the following:

- the user-friendliness of the *SaC* site
- the tone and appeal of the materials
- the clarity of the information and the logic with which it is presented
- the quality and adequacy of the support tools and materials within the module
- the actual usage of the module, including the amounts of time each component took and whether module usage was broken up into several meetings
- the choices the facilitator made to follow the module's facilitator guide exactly or not (and their rationales for their choices)
- any challenges the facilitator faced
- the strengths and weaknesses of the module components in action (e.g., the nature of the discussions they fostered)
- the relevance and value of the module to the team
- benefits of the module to team members
- impacts and benefits of the module for the school as a whole

For the Teacher Development materials, we conducted in-depth interviews with the teacher piloters after their initial reviews of 4 strategies. Data included:

- the appeal and user-friendliness of the *SaC* site and the materials
- potential relevance and value of the strategies and materials

- quality of the videos and other materials
- quality of the teaching ideas presented
- potential impacts of the materials on their own teaching
- potential impacts of the materials on the teaching of their colleagues
- potential value of the materials for broader school improvement goals

In addition, we conducted in-depth interviews of teachers after they piloted two strategies in their classrooms. Interviews focused on:

- the teaching problem they were trying to solve and their choice of *SaC* strategy
- how they actually used the strategies
- any adaptations they made
- the clarity and usability of the strategies and quality of the materials
- their students' responses to the strategies
- their assessment of the value of the strategies for their own instructional goals
- their assessment of the value of the strategies for their content or grade level teams or PLCs
- their reflections on the potential of the strategies to support instructional improvement at their school

In May 2010, several weeks after formal piloting had been completed, we conducted a round of exit interviews with facilitators, principals, the one district coordinator, and teachers to gather data on sustained use of *SaC* and on additional impacts and benefits. We also conducted in-person observations of three teachers' classroom use of *SaC* strategies (two in math, one in English language arts) to further ground and document *SaC*'s influence on classroom practices and benefits to students.

Data were entered into spreadsheets enabling within-case and cross-cases analyses. Analysis included tabulation of leadership team and teacher responses, identification of major and minor themes, and identification of illustrative examples.

## **Products of the pilot evaluation**

Throughout the study, we prepared several lengthy and detailed memoranda for the project's developers. These provided feedback and data that would help them ascertain schools' responses to the materials and also enable them to make improvements or refinements as needed. In March 2010, we met in person with the project developers and funder to discuss the results of the pilot, the potential of *SaC* to achieve its goals, and the implications for next steps in *SaC* development, rollout, and research. In June 2010, we prepared a final internal memorandum focusing on the prospects for sustainability of *SaC* past the pilot year. We also prepared a final Executive Summary of the pilot. (See Results of Pilot Evaluation in Washington State.)