CCEE Pilot Partner
Continuous Improvement
RESOURCES FOR LEA’S CONTINUOUS IMPROVEMENT EFFORT
SEPTEMBER 2017 - JUNE 2019
ACKNOWLEDGEMENTS

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Academy of Careers & Exploration (ACE)
Anaheim Union High School District
Borrego Springs Unified School District
Dos Palos Unified School District
Kern County Office of Education
Los Angeles Unified (Local District Central)
Newark Unified School District
Palo Verde Unified School District
Pomona Unified School District
Sausalito Marin City School District
Victor Valley Union High School District
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With a focus in improving quality within a data driven culture we began our journey with our “Pilot Partnership Districts” in 2017. Using a set of quality management tools, rooted in inquiry with clearly defined goals, measurable processes, and a commitment to continual improvement we completed our journey in May 2019. We are excited to share our resources and lessons learned working alongside as partners with the LEAs in our Pilot Partnership Program. The Continuous Improvement (CI) Toolkit includes research, activities, and protocols utilized in five Summits (two days in length) per year. These resources are intended to build capacity, shape a systems approach to CI, and inform collaborative efforts among state and local agencies. Based in a cycle of inquiry and using the Plan-Do-Study-Act (PDSA) model, the cycles introduce new results and challenges, that provide further opportunity for refinement. The knowledge gleaned from this process fosters a transparent and professional discourse infrastructure that includes observation from the work collectively of colleagues as well as independent work and promotes peer learning or what we call Pilot Network Partnerships. An important outcome of this work is the knowledge gained through professional dialogue, peer learning, and reflective self-practice that directly impacts the future edge gained through professional dialogue, peer learning, and reflective self-practice that directly impacts the future orientation of one’s work within the organization. We welcome the opportunity to share the Pilot Partner CI Toolkit documenting our CI journey and is ideal for schools, school districts and county offices already organized in structures rooted in analysis and improvement.

CCEE PILOT PARTNERSHIPS

The CCEE Pilot Partnership began with 13 LEAs in 2017 and ended with 12 LEAs in May 2019. To support the development of continuous improvement, CCEE worked with pilot partnership members which included county offices of education, school districts, and charter school leadership teams. The design of the technical assistance consisted of customized, research-driven, continuous improvement practices, and hands-on support through a multi-year pilot partnership that equipped local educators with the knowledge, skills and expertise to drive student learning.

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3. Borrego Springs
4. Dos Palos Unified School District
5. Kern County Office of Education
6. Los Angeles Unified (Local District Central)
7. Newark Unified School District
8. Palo Verde Unified School District
9. Pomona Unified School District
10. Sausalito Marin City School District
11. Victor Valley Union High School District
12. YouthBuild Charter School of CA

CCEE PILOT PARTNERSHIP INCEPTION

In order for LEAs to partner with the CCEE in the Pilot Partnership Summit a few steps occur to set the partnership up for success:

- LEA board approval to be part of the CCEE Pilot Partnership
- CCEE Listening and Learning through LEA’s Stakeholder Meetings involving the pilot leads, CCEE Executive Director. CCEE members ask the LEA’s the following questions:
  - What are you proud of in the school and community?
  - What one thing would we do next (challenges)?
  - Assembling of the LEA Team: Superintendent, Assistant Superintendent / Director and /or Coordinator, Principal, and Teacher Leader
  - Identification of CCEE Pilot Lead or Coach for each LEA

PILOT PARTNERSHIP LEARNING NETWORK SUMMITS AND BEYOND

The CCEE met with LEAs throughout the year to provide coaching (thought partner) support and continuous improvement team development but in order to drive the cultural shifts needed at the local level the support stretched beyond the Summit:

- 5 CCEE Partnership Learning Network (PLN) Summits (two days in length) per year were hosted that gave teams time to work deeply around their problem of practice and receive in-depth support from CCEE leads and Professional experts for capacity building and collaboration.
- LEAs with a common interest in continuous improvement were paired as Critical Friends as an opportunity to provide peer network opportunities.
- Zoom Conference Calls were pivotal in the ongoing support. Meetings varied from Superintendent & Lead; County Office and Leads; and all Leads.
- The CCEE Pilot Partner Leads (Pilot Leads).
- CCEE Staff of professional experts served as Pilot Leads and were paired with LEAs to help them during Summits; to follow up on CI work they started or continued in Summit; and to complete deliverables expected at the following Summit. Pilot Leader work involved monthly in person check-in(s) and monthly phone check-in(s) with LEAs to provide guidance, resources, and contacts to assist LEAs’ CI work. Pilot Leads are a confidant, thought partner, guide, coach, and colleague to an LEA. The tables below include Pilot Leads’ structured activities: monthly virtual Pilot Lead Team conference calls and monthly check-ins with LEAs’ team and Superintendent.

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THE CCEE PILOT PARTNER LEADS (PILOT LEADS)

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PILOT PARTNER LEAD TEAM ACTIVITIES

• Meet monthly one-on-one (Zoom)
• Meet monthly as a team (Zoom)
• Keep records of visits
• Agreed upon next steps
• Progress
• Participate in data gathering for final evaluation

PILOT PARTNER LEAD & LEA COACHING

Frequent Check-Ins

• One face-to-face a month
• Meet with Superintendent
• Meet with team
• One phone check-in

Agenda (Superintendent Meeting)

• Check-In
• Review of last meeting and agreed upon next steps related to change implementation and monitoring
• Discuss next steps and support needed
• Team meeting

Agenda (Team)

• Check-in
• Review of last meeting and agreed upon next steps from that meeting
• Next steps and support needed
• Upcoming summit and necessary preparation

Agenda Phone Check-In

• Report to Superintendent any follow up on requested supports
• Check on agreed upon next steps needed
HOW TO USE THE TOOLKIT

This graphic below taken from The Improvement Guide (Langley, et al., 2009) is a broad overview of CCEE CI Toolkit that the CCEE Pilot Partners experienced as they embarked upon their journey toward continuous improvement. This tool-kit follows the circled sections on “What’s Next” in CI journey:

- Understand the Problem and the System that Produces It
- Focus Collective Efforts
- Generate Ideas for Change
- Test and Collect Data
- Spread and Scale
- Communicate Outcomes

Each section includes the pilot partner background story, the process, lessons learned and resources used with pilot partners in the summits.

The CI models and activities chosen are intended to immerse partner teams in the work and can be modified for use at the local level in a network like setting and will establish a moral purpose to the various articles around CI.

BACKGROUND

The CCEE Theory of Action is the foundation upon which all our work has been built. The Continuous Improvement (CI) work is no exception. The capacity building around continuous improvement was meant to impact the way decisions are made in local education agencies (LEA) who are seeking to increase outcomes for students.

So, the pilot partnership experience focused on the building capacity of the team (superintendent, cabinet member/district administrator, principal, and teacher leader) to implement continuous improvement while implementing a high leverage change action. We began with a profound respect for the LEA by not selecting just one continuous improvement model but providing the leaders with many different models to choose from with the understanding that not one model was perfect to meet the diverse needs of all LEAs. Ultimately the LEAs participating in the pilot partnership adopted the Model of Improvement-POSA Cycle (Taylor, 2014) (p. 14) which has been use throughout the health care system.

The CCEE team sought to get teams more acclimated with CI through various actions, including reading articles like, Getting Better Together by Kristen MacConnell and Stacey Caillier (p. 21), and books like, How to Succeed with Continuous Improvement by Joakin Ahlstrom. The team felt providing more and more examples and information about CI would deepen the understanding of CI. So, the team used various discussion frames including the Three Levels of Text protocol (p. 28).

LESSONS LEARNED

This activity was a broad introduction to CI and allowed pilot partners to engage in a deeper understanding of improvement process models. Individuals selected their CI model that resonated with them. Allowing choice for CI model assisted in ownership and provided a framework for CI work. Although individually we differed in our CI model selection, pilot partner teams came together to select the Plan-Do-Study-Act Cycle (p. 20) with their own variations.

THE PROCESS

The teams were given a variety of continuous improvement models and organizational change frameworks to choose from. Models and frameworks were chosen by CCEE based on the current research and practice related to organizational improvement: The DMAIC Model (p. 12), ADDIE Model (p. 13), Model of Improvement-POSA Cycle (p. 14), FADE Model (p. 15), and LEAN Transformation Framework (p. 16).

To assist the pilot partners in deciding on the improvement model for use for their journey, we conducted an activity about each model that included ample time for thought and reflection (p. 19). Teams were split into groups by CI model placed around the room. Each group had a poster upon which they were to reflect on the CI Model, noting what was missing based on the pilot partner needs, what was already perfect, and what they might change were they to use it.

With individuals on each team, now immersed in each model, teams were given the opportunity to choose the CI model that would work best for them and their LEA using the CI Model Analysis Template (p. 19). They were then asked to choose one of the models and independently reflect on the model and think about how it may be adjusted to better meet the needs of their LEA. It was clear that the pilot partners wanted to adjust the language in the cycle to connect with other professional learning experiences already occurring in the LEA.

ENGAGEMENT WITH CCEE

INFO, RESOURCES, PROCESSES

SKILL AND APPLICATION

DECISION-MAKING

THE CALIFORNIA WAY

Increased student outcomes
ADDIE MODEL

- For many years now, educators and instructional designers alike have used the ADDIE Instructional Design (ID) method as a framework in designing and developing educational and training programs.
- “ADDIE” stands for Analyze, Design, Develop, Implement, and Evaluate.
- This sequence, however, does not impose a strict linear progression through the steps.
- Educators, instructional designers and training developers find this approach very useful because having stages clearly defined facilitates implementation of effective training tools.
- As an ID model, Addie Model has found wide acceptance and use.

CONTINUOUS IMPROVEMENT MODELS CHOSEN FOR CI UNDERSTANDING

As noted, several models of CI were chosen to allow pilot partner teams to become familiar with the continuous improvement process and allow them to develop ownership by thinking of new ways to frame each model. Each of these models are used in different industry sectors to improve the work being done. The goal here is for pilot partners to realize—-they own the improvement process; they must own the model for improvement. None of these models are perfect, none of them are complete for any given LEA. The following is a description of each model reviewed:

THE DMAIC MODEL (SIX SIGMA MODEL)

- Define the problem, improvement activity, opportunity for improvement, the project goals, and customer (internal and external) requirements.
- Measure process performance; the problem and the process where the problem was produced.
- Analyze the data and process to determine root causes of variation, poor performance (defects).
- Improve process performance by creating solution addressing and eliminating the root causes.
- Control to implement; sustain the improvements to keep the process going on the new course.


SETTING AIMS
The aim should be time-specific, measurable, and also defines what or whom will be affected.

ESTABLISHING MEASURES
To determine if a specific change actually leads to an improvement.

SELECTING CHANGES
Ideas come from internal and external.

TESTING CHANGES
The Plan-Do-Study-Act - planning it, trying it, observing the results, and acting on what is learned.

IMPLEMENTING CHANGES
After several PDSA cycles, the team may implement the change on a broader scale.

SPREADING CHANGES
After successful implementation of a change, the team can spread the changes to other parts of the organization.


FADE MODEL
There are 4 broad steps to the FADE QI model:

FOCUS
Define and verify the process to be improved.

ANALYZE
Collect and analyze data to establish baselines, identify root causes and point toward possible solutions.

DEVELOP
Based on the data, develop action plans for improvement, including implementation, communication, and measuring/monitoring.

EXECUTE
Implement the action plans, on a pilot basis as indicated.

EVALUATE
Install an ongoing measuring/monitoring (process control) system to ensure success.

LEAN TRANSFORMATION FRAMEWORK

Embracing the challenge of improvement through:

- Focusing on, and continuously, improving the work (the flow of value throughout the organization to the customer)
- Showing respect by developing people to continuously improve the work through problem solving
- Minimizing / eliminating waste – time, human effort, injuries, inventory, capital, space, defects, rework, etc.
- Asking what management behaviors and management system are needed


TRANSFORMATIONAL CHANGE MODEL

Anderson & Anderson’s model of change provides a comprehensive coverage of the entire process of change and equally explains the whole process of change as a cyclical process (Anderson and Anderson, 2001, p. 13). This model briefly views change from three perspectives:

CONTENT
It analyzes the technical as well as the organizational factors which require change.

PEOPLE
This analyzes the subjective factors such as the mindset, changes in the behavioral patterns of people as well as the cultural changes.

PROCESS
This stage is related with the possible action plans or strategies that can be crafted and implemented for driving the change initiative successfully across the organization.

All the three processes are integrated and interdependent on each other. The model is illustrated through nine phases.


FULLAN AND QUINN’S COHERENCE MODEL

FOCUSING DIRECTION
Systemness – integration of our work (seamless).

COLLABORATIVE CULTURE
Trumps individualism by producing strong groups.

DEEPENING LEARNING
Founded on new pedagogical partnerships; driver for using technology as the accelerator.

SECURING ACCOUNTABILITY
Developing the capacity of the group; in turn the group interfaces with the external accountability system.


CI MODEL ANALYSIS TEMPLATE
This tool is intended to help you reflect on CI models so that your LEA may utilize the one that fits your need.

NAME OF CI MODEL OR FRAMEWORK

<table>
<thead>
<tr>
<th>How does this model match your own thinking about continuous improvement?</th>
<th>How can internal stakeholders be engaged in this model?</th>
<th>How can external stakeholders be engaged in this model?</th>
</tr>
</thead>
<tbody>
<tr>
<td>How could this model apply to all levels and departments across the organization?</td>
<td>How can this model be improved?</td>
<td>How does this model compare to your organizations model of improvement?</td>
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FOCUSING DIRECTION
- Purpose Driven
- Goals that Impact
- Clarity of Strategy
- Change Leadership

CULTIVATING COLLABORATIVE CULTURES
- Cultures of Growth
- Learning Leadership
- Capacity Building
- Collaborative Work

SECURING ACCOUNTABILITY
- Internal Accountability
- External Accountability

DEEPENING LEARNING
- Clarity of Learning Goals
- Precision in Pedagogy
- Shift Practices through Capacity Building

LEADERSHIP
After reviewing several models, the following Continuous Improvement PDSA model was selected by Pilot Partners to be utilized throughout their CI journey.

**MODEL FOR IMPROVEMENT: PDSA CYCLE**

We then used the following template based on the model:

1. **Plan**
   - Objective
   - Questions and predictions (why?)
   - Plan to carry the cycle (who, what, where, when)
   - Plan for data collection

2. **Do**
   - Carry out the plan
   - Document problems and unexpected observations
   - Begin analysis of the data

3. **Study**
   - Complete the analysis of the data
   - Compare data to predictions
   - Summarize what was learned

4. **Act**
   - What Changes are there to be made?
   - Next Cycle?

**WHAT ARE WE TRYING TO ACCOMPLISH?**

**HOW WILL WE KNOW THAT A CHANGE IS AN IMPROVEMENT?**

**WHAT CHANGES WILL WE MAKE FOR IMPROVED RESULTS?**

An elementary school uses improvement science to help students express and share their thinking.

By Kristen MacConnell and Stacey Caillier

Mr. Matt’s 1st graders sit on the carpet for their number talk. He writes the problem on the board — 17 = 20-? — and then asks students to give a thumbs up when they have an answer. Students share their ideas: 3, 10, 7, 8, and 6. Next, he asks volunteers to defend their answer. One by one, students come to the board. After each student defends his or her answer, Mr. Matt asks, “Are there any questions or comments?” The room is silent.

Fast-forward one month. Mr. Matt has introduced the sentence frames, “I agree because . . .” and “I disagree because . . .” He writes 2 = ? -5 on the board and, as before, calls on volunteers to defend their answers. Yeretz confidently walks to the board and writes the number 3. She holds up her hand and says, “I have 5 fingers and if I take away 2, there are 3 left.” Mr. Matt asks, “Does anyone have any questions or comments?” There’s a buzz of excitement in the room. Three hands shoot into the air. Taylor says, “I agree with Yeretz because if I hold my fingers up and take away 2, I have 3 left, too.”

Kaleo raises his hand and says, “I agree with Yeretz because she used her fingers.” Leilani raises her hand and quickly lowers it.


“Oh! Tell us why,” says Mr. Matt.

“Because if it’s saying you minus something [-5], you might want to add a bigger number [as the minuend].”

Mr. Matt asks Leilani to come to the board to share her thinking. After she solves the problem, four

**ABOUT THE AUTHORS**

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students raise their hands, using a hand signal that indicates they’ve revised their original answers. The discussion continues for several more minutes with students revising their earlier answers on the basis of Leilani’s explanation.

Let’s look at how this transformation happened so quickly. Matt is from High Tech Elementary Chula Vista, a project-based charter school in California that serves a diverse student population of about 330 students in grades K-5 (Hispanic, 60%, Asian 20%, Caucasian, 8%, African-American 7%, Native American, 3%, and Pacific Islander 2%). The student population is 55% free and reduced-price lunch, 20% English language learners, and 13% students receive special education services. He’s part of a group of teachers who have been using improvement science, a method for solving a problem of practice with disciplined inquiry, to help students make their thinking visible. These teachers wanted to increase students’ use of “how” and “why” language to articulate their thinking. For the past six months, the group has been using short cycles of inquiry, action, and reflection to test different “change ideas,” like the introduction of sentence frames.

Improvement science as professional learning

At the core of improvement science are three simple questions (Langley et al., 2009): What are we trying to accomplish? How will we know if a change is an improvement? What changes might we introduce and why?

As educators, we generate new ideas, reflect on our practice, and make changes that we hope will improve student learning. Yet we often struggle to set clear, measurable goals, let alone develop systematic ways for tracking our progress. With its emphasis on developing a clear theory of action, “practical measures,” quick iterative cycles to guide teacher learning, and a network structure that facilitates sharing and accelerated learning, improvement science is a promising framework for scaffolding teacher learning and scaling good ideas (Bryk, Gomez, & Grunow, 2011; Yeager et al., 2013).

To build teachers’ investment in the improvement science process, the authors asked teachers to reflect on the following questions:

- What are my dreams for our school and for my students?
- How do I want to grow as an educator over the next year?
- If equity is at our core, what areas — in my practice and our school — are ripe for improvement?

Teachers identified four topics that were most likely to advance equity at the school and that most inspired them to improve:

- Making thinking visible;
- Designing equitable group work;
- Developing student agency; and
- Improving writing instruction.

We’ll focus on the work of the Making Thinking Visible team, which was inspired by the work of Harvard’s Project Zero (Ritchhart, Church, & Morrison, 2011).

The hub — a person or organization that helps guide the work and maintain the team’s focus — is crucial to improvement science. One of us — Kristen — served as the hub for the Making Thinking Visible team, helping team members dig into existing research and craft knowledge to develop a theory of action to guide their next steps. The team shared resources, read articles, and examined various thinking routines. They reflected on aspects of their classes where thinking could be richer (such as class discussions or end-of-activity reflections) and practices they felt would promote visible thinking (such as creating a class blog). As the hub, Kristen planned and facilitated biweekly meetings and supported teachers in collecting, analyzing, and reflecting on evidence.

Developing a theory of action

In improvement science, learning comes from doing. Improvement science encourages educators to avoid “solutionitis” and first get grounded in a deep understanding of the problem. To begin, the team conducted empathy interviews with students. Each team member asked a student to talk about a time the student felt successful sharing his/her thinking in class and a time when it was hard to share thinking and what advice they would give other students who were having trouble sharing their thinking. For ex- ample, students said they felt most comfortable sharing ideas when they could talk with a partner first, then the class. Students said sharing their thinking was difficult when they felt rushed and/or if they felt others might judge their ideas negatively.

Team members then used a fishbone diagram to identify the multiple factors that might contribute to students’ difficulty sharing their thinking with the class. Drawing on their own experiences and what they had learned from empathy interviews, the team identified a variety of root causes such as a lack of strong models and insufficient opportunities to practice sharing thinking. They discussed factors related to language, teacher language might be too complex and wordy, and students might lack the academic vocabulary to express their ideas clearly. Another root cause was related to student agency and students’ perceptions that it felt risky to share ideas with the class. As a result, many teachers decided to focus on developing structures and routines to minimize this sense of risk and create safety for sharing.

Having deepened their understanding of the problem, the group developed a theory of action. Drawing on research and craft knowledge, they constructed a driver diagram that articulated the aim — students will increase their use of how/why language to express their thinking — as well as the “drivers” or areas of focus the group would need to attend to in order to achieve the aim. Drivers included classroom routines, structures, and modeling; teacher language; and student vocabulary/academic language. The group also identified concrete change ideas related to these drivers — specific, measurable interventions they wanted to try in their classrooms, such as using sentence frames like, “I agree because . . .” “I used to think/now I think . . .,” and prompting students with the phrase, “What makes you say that?” At the end of a lesson, they would use exit cards to capture students’ thinking. The driver diagram served as a guide for their work and evolved as they learned how best to achieve their aim.
Improvement science fosters reflective practice grounded in evidence.

Although many models of professional learning embed reflection, inquiry, and the use of data, improvement science uses just enough data to accelerate teacher learning, facilitate deep reflection, and guide further action. This approach differs from typical data-driven professional learning in which teachers have little choice about the types of data collected (such as test scores or schoolwide assessments) or must deal with an abundance of data that is challenging to analyze in useful ways. Such data can feel divorced from day-to-day teaching practice. As a result, many data-driven discussions fail to support teachers in generating concrete steps for improving student learning.

In contrast, Making Thinking Visible teams collect concrete evidence about student thinking. For example, Rosemarie, a kindergarten teacher, gathered video data to capture her students’ thinking. “I learned that video is a powerful documentation tool because we were able to revisit student thinking and, in turn, respond,” she said. For example, Rosemarie noticed that several of her language learners began to say, “I need more time” when the class was sharing their thinking after an activity. After recognizing this pattern on video, she developed her next change idea: “pre-conferencing with her language learners before the whole class reflection.

Improvement science helps teachers take action.

Reflecting on the difference between more traditional professional learning and improvement science, one teacher noted, “In my experience, meetings often lack an action-based approach and end up with people simply talking about change ideas, not actually trying them.” The opportunity to go beyond talk and take action is a powerful component of improvement science, one that facilitates teacher ownership. At High Tech Elementary Chula Vista, teachers chose an area of focus that was meaningful to them and then engaged in PDAs where they decided what to do, how to do it, and what data they would collect to know if they were making progress toward their goal.

For example, Matt noted on one PDSA form that he wanted to “try to find ways to have more one-on-one conversations with students and also see if I can gain more access to student thinking [for those students] who aren’t sharing regularly in math.” Grace, a 5th-grade teacher, wanted students to be “more creative in how they work on problems and assignments.” She came up with the following actions to push student thinking: Ask students to respond to one another’s reading and writing rather than simply sharing their own. Ask more open-ended questions and spend more time on them. There were times when teachers didn’t complete their PDAs, either because they hadn’t clearly articulated what they wanted to learn, or they were unsure what data to collect and how to collect that information. Working through these challenges collaboratively helped teachers regain control and take action.

Improvement science facilitates collaboration and sharing.

Improvement science brings teachers together in networked improvement communities to share data, talk about the effectiveness of change ideas, and accelerate learning. As LeMahieu and colleagues explained, “Networks are rich sources of innovation; they provide diverse contexts in which to learn from testing, they allow the detection of patterns that would otherwise appear singular, and they provide the social connections that accelerate knowledge production and dissemination” (LeMahieu, Edwards, & Gomez, 2015, p. 447).

Four characteristics of networked improvement communities are unique to improvement science:

1. **Collaboration:** Teachers work together in community to develop collective action plans and share data.
2. **Inquiry:** Teachers use data to guide action and make sense of change.
3. **Reflection:** Teachers reflect on how their actions affect student learning.
4. **Responsibility:** Teachers own the improvement process and are accountable for their own learning.

Improvement science helps teachers get better at making student thinking visible.

The teachers examined their data, reflected on their learning, and adapted their ideas to improve practice.

Sample of exit cards completed at the ends of lessons.

Capturing just enough data specific to a focused inquiry helped teachers get better at making student thinking visible.
These communities are:

- Focused on a specific aim;
- Guided by a deep understanding of the problem and the system that produces it;
- Disciplined by the rigor of improvement science; and
- Networked to accelerate the learning into varied education contexts (Martin & Gobrecht, 2015).

As we examined teacher reflections about their participation in this process, we identified two consistent themes that aligned with these characteristics. First, the structures of networked improvement science—planning and documenting through PDAs, support from the hub, and regular meetings—provided both support and accountability for teachers to remain engaged in the work. “I really appreciated the chance to develop ideas with my group and our leader because it provided accountability and inspiration,” Grace said. Matt reflected, “I don’t think [this experience] would be the same without having a mentor to guide me along the way.” Second, participating in a networked improvement community accelerated learning. As teachers shared ideas, other teachers were inspired to implement a colleague’s work. Grace noted how much she had learned from Rosemarie about the importance of taking time each day to reflect with her students on how their thinking had changed, and how powerful it was to see that progression of thinking over time through the video data that Rosemarie had gathered. Paul wrote, “The social aspect of this experience has been empowering. If it hadn’t been for Kristen’s work with Matt around number talks, I probably wouldn’t have embraced them in my own classroom.” Now I’m doing them two to three times a week, and students are really enthusiastic about sharing their math thinking! Teachers are continually innovating in their classrooms. The structure created opportunities for teachers to share their learning in authentic and meaningful ways.

How did we do?

Did teachers reach their aim of increasing students’ use of “how” and “why” language to articulate their thinking? We can’t say with 100% certainty that all students are using that language to explain their thinking daily, but we can say with confidence that they’re getting closer. Five of six teachers said they have increased the number of opportunities that students have throughout the day to share their thinking. In addition, five of six teachers reported an increase in students’ use of how and why language to share their thinking. These data are supported by observations and video data from each teacher’s classroom.

In discussions are now joining in. Now when Matt asks, “Are there any comments or questions?” his students can hardly wait to share!

Improvement science has provided a powerful framework for engaging teachers as collaborative problem solvers. It grounds inquiry and actions in a shared goal and provides an invaluable tool to assess the effect of those actions on student learning.

References


THIS PROTOCOL

PURPOSE
This protocol is designed to deepen the understanding of a text and explore implications for participants’ work. It asks participants to respond to 3 levels of the text: Literal (Level 1), Interpretation (Level 2), and Implications (Level 3). This can be used as a prelude to a text-based discussion or by itself.

Time
30-45 Minutes

Materials
• Copies of text for each participant
• Highlighters
• Sticky Notes
• Pens

Roles
Timekeeper / facilitator, who both participates and keeps the process moving.

Stick to the time limits. Each round takes up to 5 minutes per person in a group. Emphasize the need to watch airtime during the brief group response segment.

DEBRIEF
How was this a useful way to explore the ideas in the text and to explore your own thinking?

Adapted from The Final Word Protocol, National School Reform Faculty, nsrfharmony.org
THE CEE PILOT PROGRAM STORY

BACKGROUND

Einstein said if we have an hour to solve a problem, fifty minutes should be spent trying to understand the problem, and the last ten minutes for looking for solutions. The CCEE team recognizes how easy it is to look at data and then try to quickly look for programs or interventions to solve them. With this in mind we set out to put together experiences allowing the pilot partner teams to really understand the problem they most wanted to address.

THE PROCESS

Data Analysis

The teams first looked at data from a “mock” district (actual district outside of Pilot LEAs). They were asked to examine the data and then try to determine what they might find in the LCAP of the district. There was discussion around the data points as each team was given a set of data points depicting student performance on the data dashboard.

The teams were then given “mock” district LCAP goals and discuss any surprises or confirmations. Then each team was given their own LEA data to review. Each team member was asked to use the see, think, wonder reflection sheet to examine the data individually. The reflection sheet was completed in sections, first discussing what they saw in the data, then discussing what they thought about what they saw, lastly discussing what they wonder about the data.

A deeper continuous improvement learning was strengthened through a book read: How to Succeed with Continuous Improvement by Joakim Ahlström. Participants read and took part in the activities mentioned in the book to measure their efficacy, problem or practice and their organization’s continuous improvement culture. From this work participant adapted and pivoted in their plans as needed.

Three questions became grounding questions for our pilot partners as they embarked on their CI work: What are we trying to do? What changes can we make that will result in improvement? How will we know a change is an improvement? (p. 31).

Lastly, teams were asked to choose a data set that if they addressed would make the biggest impact on student outcomes.

Five Whys (p. 36)

Pilot partners were given the 5 Why’s Analysis Template (p. 36) and asked to complete one of the three columns on the template individually. They were asked to keep asking why until they feel they have reached the ultimate reason for the performance outcome. It could be they only ask three why’s, or they might have to ask eight - with the ultimate goal of getting to the core of the problem. Then they were asked to turn to an elbow partner and share their whys and try to agree on what they believe to be the root of the problem, then they were asked to discuss as a team, ultimately choosing one root cause.

Fishbone Diagram (p. 34)

Pilot partners participated in utilizing the Fishbone Diagram (p. 34) to explore the problem of practice and root causes. With the use of poster and stickers, teams were able to gather consensus around the root cause by placing stickers next to three root causes. They were then able to spend time at every other teams’ Fishbone Diagram poster to place stickers around the root cause. This allowed for sharing and gathering input from all the pilot partners. This protocol is included in this section.

LESSONS LEARNED

The biggest lesson learned here is you can’t spend too much time understanding the problem. The Fishbone Diagram became a very doable and exciting protocol that teams utilized continually. Due to the ease of use and results received from the Fishbone protocol, a couple of pilot partner administrators were inclined to share this protocol to other administrators at their county meeting and were able to engage others in root cause analysis.

UNDERSTANDING THE PROBLEM

Going Deeper with the Big 3 Questions of Continuous Improvement

These three questions became grounding questions for our pilot partners as they embarked on their CI work. These questions provide a constant focus on the root cause of the problem, focused goal, and what to measure.


RESOURCES & ACTIVITIES

BIG 3 QUESTIONS WITH SUB PROBING QUESTIONS:

1. What are we trying to accomplish?
   - What is our goal?
   - Who is the focus of our goal?
   - When will you reach our goal?
   - Why is this goal important?

2. What changes can we make that will result in improvement?
   - What change action could we choose to take that would have the biggest impact?
   - Who will implement the change action?
   - Why do we believe this change action will have the biggest impact?
   - When and on what timeline will we implement this change action?

3. How will we know that a change is actually an improvement?
   - What key components to the change action can we measure?
   - What do we already have in place to measure these components?
   - What process measures will we use to determine if your change action is occurring?
   - What outcome measures will we use to determine if your change action is making an impact?
   - How can we measure impact of the change action on the trajectory of our achievement gap?
SEE, THINK, WONDER:
DATA ANALYSIS TEMPLATE

This template is intended to help LEAs analyze their school data to understand the root cause as they walk through their data and self-reflect with the categorized questions.

**SEE**
- What patterns do you notice?
- What gaps do you see?
- What trends do you see?

**THINK**
- What do you think about the patterns you notice?
- What do you think about the gaps you see?
- What do you think about the trends you see?
- What do you think is happening to create these outcomes?

**WONDER**
- Based upon your thoughts about the patterns, gaps, and trends you see, what do you wonder about?
- What issues, or ideas have been raised in your wonderings?

---

FISHBONE GENERATION PROTOCOL

**PURPOSE**
The purpose of this protocol is to arrive at a deeper understanding of the problem we want to address (before jumping to solutions).

**PROTOCOL**

1. **Generating our Problem Statement (5-7 minutes)**
   - Individual: What is the problem we need to solve? See if you can express the problem in one sentence.
   - Group discuss and agree on a problem statement.

2. **Initial Brainstorm of Causes (5 min.)**
   - Based on your work digging into the problem (i.e., empathy interviews, expert convenings, relevant data, research, etc.) and your own ideas/experiences, individually brainstorm as many causes as you can that might contribute to the problem/issue. Write each cause on a different post-it. For meaty “big” topics, it can help to ask a chain of “why?”.

3. **Group discuss and agree on a problem statement.**

4. **Share & Categorize (15-20 min)**
   - Each person shares one cause contributing to the problem. If others have a similar cause, you can start to group those post-its together on your poster.
   - Continue to share your initial brainstorm, building on each other’s ideas and adding new causes that may contribute to the problem.

5. **Cluster on your Poster**
   - Group related causes together and give each category a title. (The stuff on the post-its are the details/bones on the fishbone).

6. **Post & Reflect (5 min)**
   - Post your poster to the wall. Does your diagram capture the root causes you think are important? Anything missing? Then each person gets to vote with one heart and one star:
     - **High Leverage**: Put a heart by the factor, that if addressed, you think would have a significant impact on the problem.
     - **Practical**: Put a star by the factor that is within your control, that your team could address with little effort.

7. **DEBRIEF (5 MIN)**
   - How did we do upholding the norms?
   - How might we adjust this protocol in the future?

---

FACTORS INFLUENCING INEQUITABLE PARTICIPATION IN GROUP WORK

CULTURE OF GROUP WORK
- The students in the group don’t understand how to work with others
- Students don’t feel comfortable giving kind, constructive feedback
- Prior experience and practice with group work
- Students don’t understand the expectation to include others

GROUP STRUCTURES & SCAFFOLDS
- Lack of protocols
- Roles
- Not enough time for all
- Physical space does not allow for all bodies to be present and access the task equally

STUDENT BELIEFS & ATTITUDES
- Level of self-confidence
- Students are not engaged in the task
- Lack of excitement or enthusiasm
- Student ownership (collaborating because teacher told me to vs. ownership)

STUDENT ATTRIBUTES
- Introversion / extroversion
- Dominant / passive personalities

STATUS
- Gender expectations
- Preconceived notions of group members
- Peer status
- Social status
- Academic status

GROUP WORTHINESS OF THE TALK
- Task does not support equity by requiring multiple perspectives or multiple people to complete
- What sports are in place for the teacher in designing quality tasks?

COMMUNICATION
- Active listening
- Body language
- Ability to verbalize thoughts
- Empathy
- Students don’t have language to respectfully challenge or disagree
- Students are not able to ask for what they need
- Students don’t have common language for working together
- Confidence speaking up in a group

STUDENT CAPACITY TO ENGAGE IN THE TALK
- Students don’t understand what is required by the task
- Not all students have a skill to share toward the task
- Shared knowledge
- Students don’t have prerequisite skills for the task
- Not all students feel confident in their ability to do the task

FISHBONE DIAGRAM TEMPLATE

PROBLEM: The gap between where you are and where you want to be.

Why?
**FIVE WHY’S PROTOCOL**

**PURPOSE**
The purpose of this protocol is to arrive at a deeper understanding of the problem we want to address (before jumping to solutions).

**Time**
30 minutes

**Materials**
5 Why’s Templates: You can select which document to use
Pens
Chart Paper
Markers
Sticky Notes

**Roles**
Timekeeper/facilitator, who both participates and keeps the process moving

**PROTOCOL**
Group Generates the Problem Statement (5-7 minutes)
Place the problem statement in the top box on the template.

**Individual Work**
1. Answer the question Why__________________________ (Problem Statement) in the first box.
2. Answer another Why __________ with the answer to the first question.
3. Continue this process until you arrive at what is thought to be the underlying cause within the group’s locus of control with the most impact on the problem.
4. On a sticky note, the individual writes the underlying cause within the group’s locus of control and with the most impact on the problem.

The group discusses each sticky note and prioritizes the causes to choose the most advantageous one to address first.

**DEBRIEF**
How was this a useful way to explore the problem and value every voice?

Technique originally developed by Sakichi Toyoda and was used within the Toyota Motor Corporation.
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**FOCUS COLLECTIVE EFFORTS**
THE CCEE PILOT PROGRAM STORY

BACKGROUND

CCEE created the Pilot Partnership in response to state legislation (AB 1623; SB 828) to assist county offices, school districts, and charter schools to improve the quality of education. CCEE’s Pilot Partnership maintained adherence to the CCEE theory of action for support that would strengthen local control embedded in Local Control Funding Formula and CCEE legislation. Since stakeholder engagement is a critical aspect in the development and implementation of LCFF, the CCEE team designed the pilot partnership activities with the aim of fostering stakeholder engagement within and across LEAs as a professional learning network. For this reason, many of the activities in the CCEE CI Toolkit involve self-reflection, working together, and engaging in action-oriented feedback to refine their continuous improvement cycles (short cycle). In addition, it was critical to have teachers and principals on the pilot partner teams to ensure those closest to students were able to give voice to, and affirm, the problem of practice, develop the theory of action, and develop the short cycles.

The work of engagement began with the importance of developing a moral purpose for the CI journey ahead. At the summits, pilot partners identified the importance of communication and the power of doing the continuous improvement work, not in silos, but together with their stakeholders. The Pilot Partnership teams were then asked to develop a communication plan for each type of stakeholder. In the second year of the pilot partnership it became clear that there was opportunity to leverage and build the LEA relationship and experience across participating pilot partnership LEAs with specific job alike activities.

In addition to work done at the summit, CCEE Pilot Leads spent time with each pilot partner conducting focus group interviews to gather qualitative data regarding the chosen focus area. This data was gathered and presented to the team to add more local context to the problem being studied.

THE PROCESS

The first item in this section: Setting Moral Purpose (p. 41) has an introduction and a description of the process used. Next, you will see the communications considerations template (p. 42). The form asks the teams to think of what and how they need to communicate to each stakeholder group and develop a timeline for communication. The teams were given an entire afternoon to develop this plan.

The change driver diagram (p. 43) was used with some of the teams with some of the pilot leads. It was utilized before determining a change action to address the problem, and then revisited afterwards to delve deeper into measurement.

The last two items in this section were used to develop inclusion, as well as get a clear picture regarding the LEA’s association with continuous improvement: Getting to Know You Questions Protocol (p. 44) and Current State Analysis of Our Improvement Work (p. 45).

LESSONS LEARNED

When it comes to having everyone in an LEA understand the CI process, making sure the communication plan is implemented is crucial. This is a reoccurring theme throughout the lessons learned - the CCEE lead coaching between the summits was critical to the change actually being implemented. We also neglected to collect the results from the status of CI survey and decided in the third and final year to use it as critical piece of data in our research.

SETTING MORAL PURPOSE: THE CCEE PILOT PARTNER STORY

Developing the WHY behind the implementation of a change is imperative. The CCEE team developed the following activity to allow teams to begin to develop trust and understand each of their whys.

The activity began with a quick write where participants were asked to answer the following questions:

• What is your moral purpose?
• What actions do you take to realize this purpose?
• How do you help others find clarity in their moral purpose?
• How close are you in realizing your purpose with students?

The team then watched a video called: “Be the Change You Want to See in the World.” You can find this video on YouTube, linked below. It depicts a major problem in a city where a big tree has fallen in the middle of the road. While most of the people just looked at the tree, a young boy decides he would try to move the tree. It was then others began to realize they can impact this problem if they all helped.

After the video the teams were asked:

What helped this group to accomplish a seemingly impossible task?

The teams then went through the Sideline Protocol. The protocol was developed with three discussion prompts:

• When it comes to your district or school improvement... What is your tree?
• How do you engage others in moving the tree?
• How does this video relate your moral purpose?

RESOURCES & ACTIVITIES

FOCUS COLLECTIVE EFFORTS

SETTING MORAL PURPOSE: THE CCEE PILOT PARTNER STORY

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• How do you engage others in moving the tree?
• How does this video relate your moral purpose?

Sideline Protocol

PURPOSE

Participants will have short one-to-one conversations around the “problem(tree)” and cycle through the 3 guiding questions.

PROTOCOL

Pair up and form two lines, with partners facing each other. Round 1: Facing Pairs will discuss the 1st prompt. After 3 minutes, the first person in Row A will move to the end of Row A. Each Person will then move one space to the right until everyone has a new partner.

DEBRIEF

After the activity has been completed it is important to give members time to reflect and jot down notes from their conversations before engaging in whole group findings.

RESOURCES & ACTIVITIES

FOCUS COLLECTIVE EFFORTS
COMMUNICATIONS CONSIDERATIONS

Use this template to think through what and how your team needs to communicate to each stakeholder group and develop a timeline for communication.

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<th>WHAT TO COMMUNICATE</th>
<th>TO WHOM</th>
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<td>Teachers not directly involved</td>
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<td>Students</td>
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CHANGE DRIVER DIAGRAM

This driver diagram template is to assist with mapping out the specific changes needed to achieve the desired outcome.

WHAT IS DRIVING YOUR CHANGE ACTION?

Problem of Practice

- Primary Drivers
- Specific change ideas
- How will you attend to each item in the blue boxes? - specific actions

WHAT ARE YOU TRYING TO DO?

- Measures
- Measures
- Measures

This template is from Learning to Improve By Anthony Bryk, Louis Gomez, Alicia Grunow, and Paul LeMahieu.
PURPOSE

A great way to help people open up is to ask them fun questions that allow them to express their personality or interesting things about them.

Time
10 minutes

Materials
None

Roles
None

Here is a list of twenty safe, useful icebreaker questions to help break the ice:

1. If you could have an endless supply of any food, what would you get?
2. If you were an animal, what would you be and why?
3. What is one goal you’d like to accomplish during your lifetime?
4. When you were little, who was your favorite superhero and why?
5. Who is your hero? (a parent, a celebrity, an influential person in one’s life)
6. What’s your favorite thing to do in the summer?
7. If they made a movie of your life, what would it be about, and which actor would you want to play you?
8. If you were an ice cream flavor, which one would you be and why?
9. What’s your favorite cartoon character, and why?
10. If you could visit any place in the world, where would you choose to go and why?
11. What’s the ideal dream job for you?
12. Are you a morning or night person?
13. What are your favorite hobbies?
14. What are your pet peeves or interesting things about you that you dislike?
15. What’s the weirdest thing you’ve ever eaten?
16. Name one of your favorite things about someone in your family.
17. Tell us about a unique or quirky habit of yours.
18. If you had to describe yourself using three words, it would be...
19. If someone made a movie of your life would it be a drama, a comedy, a romantic comedy, action film, or science fiction?
20. If I could be anybody besides myself, I would be...

www.icebreakers.ws/get-to-know-you/icebreaker-questions.html

CURRENT STATE ANALYSIS OF OUR IMPROVEMENT WORK

You can administer this survey at the start of your CI journey and periodically to assess the changes in the team culture, efficacy and to view the current state of your CI work. This survey was Modified from: How to Succeed with Continuous Improvement by Joakim Ahlström.

1. Where we work everyone is fully aware of why we need to work with improvements.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

2. Where we work everyone can continually see how their own efforts contribute to the overall results for the LEA.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

3. Our improvements are based on problems identified by data with input from a cross section of instructional and administrative teams.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

4. The way we work with improvements stimulates and anchors our collaboration.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

5. Decisions made in our LEA are based on a true picture of our actual current state.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

6. Where we work, everyone knows why we implement the improvements we do.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

7. We set targets and follow-up on our improvement work in a way that helps us evaluate and improve our improvement work.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

8. We celebrate our successes frequently enough on our journey toward our targets.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

9. We talk often about positive examples of improvements.
   No, not at all  Yes, really
   1 2 3 4 5 6 7 8 9 10

10. We always identify the root cause of our problems.
    No, not at all  Yes, really
    1 2 3 4 5 6 7 8 9 10

11. Where we work everyone knows what is expected from her or him in the improvement work.
    No, not at all  Yes, really
    1 2 3 4 5 6 7 8 9 10

12. My manager is sufficiently committed to improvement work.
    No, not at all  Yes, really
    1 2 3 4 5 6 7 8 9 10

13. We are good enough at coaching each other on our journey towards the targets.
    No, not at all  Yes, really
    1 2 3 4 5 6 7 8 9 10

14. We gather facts from multiple settings, data sets, and stakeholders to identify problems and the extent of these problems.
    No, not at all  Yes, really
    1 2 3 4 5 6 7 8 9 10

15. We are aware of the issues we need to work on.
    No, not at all  Yes, really
    1 2 3 4 5 6 7 8 9 10
GENERATE IDEAS FOR CHANGE

BACKGROUND

After determining a root cause, the problem being studied, it was important to spend some time learning about how to choose change ideas to have the biggest impact on the root of the problem. This is where it became evident the root cause may or may not have been identified.

The team knew the work around implementing a change action really involves being able to focus on it and not get distracted from the multiple and daily responsibilities back at the district and sites.

THE PROCESS

The first part of working with the pilot partners to determine a high leverage change idea involved using the high leverage change idea protocol (p. 48) in this section. Here the teams worked individually to come up with as many change ideas as they could to address the problem. Then, they were asked to place each idea in one of the four quadrants shown on the protocol to help them identify the low effort and high impact ideas. From the change ideas on the chart, participant teams were asked to choose a change action that was both easy to implement and would have a big impact on the problem. The aim to ground the pilot partners in a “quick win” was to help them practice being focused and to work as a team as they implement continuous improvement.

The Basic Action Plan (p. 49) was used to allow teams to think through initial actions needed to implement the chosen change action. Pilot partners were given an afternoon to complete this plan.

To provide teams a full picture of the CI process, the team created the CI funnel (p. 50) showing all of the work to be done in the process, from developing a focus to studying the data from the implementation of a short cycle. This became an artifact the team collected to examine each team’s understanding and progress.

Coaches used the Partner Cognitive Coaching Protocol (p. 52) to allow reflective and deeper discussion with the pilot partners team.

LESSON LEARNED

The pilot leads needed time to build CI knowledge, and identify activities and protocols, to then implement change actions with pilot partners. As a result, the selection of focus and kick-off into the short cycles took time. A quicker approach can be taken if the leads/support providers have their CI knowledge and toolkit ready to implement.
High Leverage Change Idea Protocol

PURPOSE
The purpose of this protocol is to arrive at an agreed upon change idea to address an agreed upon cause to a problem.

Time
20 minutes

Materials
Previously developed fishbone diagram
Chart paper with four quadrants drawn (See the end of protocol)
Markers
Sticky Notes

Roles
Timekeeper/facilitator, who both participates and keeps the process moving

PROTOCOL

1. Review the problem and chosen cause from the Fish Diagram.
2. **Individual:** What actions/changes if implemented would address the identified cause.
3. **Use the Problem statement:** It can be challenging to effectively coordinate inclusion supports.
   You may choose to modify the problem statement.
4. **Initial Brainstorm of Causes (5 min.)**
   Based on your work digging into the problem and underlying cause (i.e. empathy interviews, expert convenings, relevant data, research, etc.) and your own ideas/experiences, individually brainstorm as many actions or change you think will address the cause.
5. **Share & Place** in an agreed upon quadrant (15-20 min)
   Share around: Each person shares one action change idea at a time, and the team discusses and agrees upon where the idea goes on the poster. If others have a similar action or change idea, you can place them together.
6. **Choose** one or more actions or change ideas to address the cause.

DEBRIEF (5 MIN)
How did we do upholding the norms?
How might we adjust this protocol in the future?

BASIC ACTION PLAN

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</table>
Focus (Data Review, See Think Wonder)

Root Cause (5 Why’s, Empathy Interviews, Fishbone)

Change Action (High Impact/Low Effort Chart)

Predictions

Evidence of Success and Implementation

Data Collection and Study

Refinement Strategy

FOCUS

Focus (Data Review, See Think Wonder: Data review Special Education achievement in math)

Root Cause (Empathy Interviews, Fishbone) Poor placement in Special Education math classes.

Change Action (High Impact/Low Effort Chart) Create Special Education specific math placement procedures for all secondary math classes

Prediction If we place students correctly, they will do better in the classes they are in

Evidence of Success and Implementation

Higher GPSs in the secondary math classes for Special Education students after taking the placement tests

Data Collection and Study

Every eight weeks teachers and leadership will review grades and discuss findings

Refinement Strategy

By March, the teachers and leadership team will make a recommendation about what comes next

IMPACT
PARTNER COGNITIVE COACHING PROTOCOL

PURPOSE

These questions provide prompts to the coach and inquiring LEA team in reflective practices. Coaches utilized these questions in aiding the team to reflect on their problem, change action, and data outcomes. LEA teams also utilized these questions during discussions with Partnership Network LEAs.

Materials
Handout of these questions

Roles
Coach/Listening LEA

Questions we’ve been using:

1. What is your selected area of focus?
2. What is your change action/actions?
3. What were your intended results?
4. What were your actual results?
5. What caused the results?
6. What will you do the same in the next cycle?
7. What will you do differently?

Cognitive Coaching Questions:

1. What are you hoping to accomplish _______ (with your change action)?
2. What might be some of the pieces of evidence you can collect?
3. What might you see/hear that will let you know you’ve reached your goal?
4. What will guide your decisions about _______ (your short cycle)?
5. What’s the best that could happen with _______ (this short cycle)?
6. What might be the long- and short-term effects of _______ (your short cycle)?
7. What might you need to do to be the best prepared for this short cycle?
8. What might be some strategies you have used before that was effective?
9. What might be some of your choices?
10. How might your actions enhance student learning?
11. Over what factors might you have most control?
12. How might these strategies support student learning in other settings?
13. What are some of your predictions about how your next short cycle will go?
14. What might be the primary value of this short cycle to your students?
15. What kind of help might be useful to you with this short cycle?
16. How might some of your colleagues support you with this short cycle?

DEBRIEF

These questions were integrated into the Critical Friend Protocol as well as during Sharing of LEAs Short Cycle.

TEST & COLLECT DATA
The CCEE Pilot Partner Story:

The Short Cycle

**Background**

In the final year of the Pilot Partnership teams began to develop a full plan to implement a short cycle for their change action. The teams had now had a year of learning immersed in CI and were now ready to create a change that would have a great impact on the pilot partner’s identified problem of practice. There had been in year one, some work with design theory and innovation. This time, the teams are using their change action, and if necessary, breaking it down into smaller pieces to develop short cycles of inquiry to study the impact and implementation. Critical to the short cycle was the identification of process and outcome measures:

**Process Measures**
- Evidence-based best practices that represent an organization’s effort to systematize its improvement efforts
- Drive improvement

**Outcome Measures**
- High level measurable outcome
- Dashboard, summative assessments, benchmark assessments

**Lessons Learned**

An important role that the pilot leads filled was in coaching the pilot partners in implementing, measuring, and studying the change implementation. It was imperative that pilot leads meet with each team to confirm data sets to be presented at the next summit, including their reflection and adjustments. Pilot leads provided support for pilot partners to stay focused on implementing change.

Summits were spaced apart (July, October, January, March, and May) which provided a timeline for short cycle reflection, presentation, and commitment on the next short cycle. “Team Time” was valuable for pilot partners to identify and develop short cycles. Pilot partners were paired with other pilot network teams to go deeper into their short cycle reflection and discussion. Both County representative(s) and pilot leads facilitated protocols with pilot partners.

**The Process**

After being provided two different examples of how process and outcome measured can be identified, teams were provided with a blank template to list and plan both process and outcome measures. They discussed measures they should use to study both the impact and the implementation of the change action. In addition, they were given an implementation timeline to complete. Again, the key to this work is in the coaching between the creation of the metric identification and the implementation timeline.

**Process & Outcome Measures**

Providing the teams with capacity building experiences around determining the appropriate measures of impact for the identified change began with a deep dive into the big three improvement questions (The Who, What, When, and Why of each question) and began with the CCEE work.

**What are we trying to accomplish?**
- What change action could we choose to take that would have the biggest impact?
- Who will implement the change action?
- Why do we believe this change action will have the biggest impact?
- When and on what timeline will we implement this change action?

**What changes can we make that will result in improvement?**

- What: Engage partners with CCEE lead visits and partnership network meetings
- Who: CCEE Team
- Why: CCEE Theory of Action
  - Continuous improvement that is evidenced based
  - Communication and engagement
  - Equity focused actions
- When: Regular CCEE lead visits and network meetings virtual and face to face.

**How will we know that a change is actually an improvement?**

- What key components to the change action can we measure?
- CCEE lead visits
- Partnership network meetings
- Partner’s capacity to:
  - Implementation of evidenced base, equity focused action using continuous improvement processes
  - Engage and communicate to stakeholders
  - Increased student outcomes

**Process Measures**

- Evidence-based best practices that represent an organization’s effort to systematize its improvement efforts.
- Drive improvement
- Outcome Measures
- High level measurable outcomes
- Dashboard, summative assessments, benchmark assessments

As the Pilot Partnership continued, we revisited and referenced process and outcome measures and continue to add layers as we continued to drill down to the school level. One of these layers is Technical and Adaptive changes, defined below. The following exercise was done with using an equity lens. You will be visually guided below through on how to analyze an area of focus and subsequently how to break it down and identify possible solutions to then creating your theory of action (TOA).

The materials below were developed in partnership with Collaborative Learning Solutions.

www.clsteam.net
**PROCESS MEASURES** | **OUTCOME MEASURES**
---|---
CCEE lead visit | Number of visits
Scheduled/Calendar
Agendas planned and focused
Driven by pilot partner | Agenda identified focus and/or other artifacts
Partnership network meeting | Number of LEA teams in attendance
Scheduled/Calendar
Content developed with outcomes in mind | Survey results
LEA implementation of evidenced based, equity focused actions using continuous improvement | Identified continuous improvement model
Identified evidenced based, equity focused action(s) | Artifacts collected with identified continuous improvement and change actions identified
Interviews with LEA teams | LEA engagement and communication to stakeholders
Content and time to develop communication and engagement content | Artifacts around communication and engagement collected
Interviews with LEA teams | Increased student outcomes
Time to determine student outcomes to measure | Identified student outcome measures

This is a (blank) learning grid that will be used throughout this section. Provided for user reference and ease.

**A PERSONAL EXAMPLE**

While this is a complete version, the Theory of Action was developed toward the end after the working through the learning grid. The sample in the next page will guide you through steps along the way while looking at a school.

<table>
<thead>
<tr>
<th>AREA OF FOCUS</th>
<th>OBSERVATION</th>
<th>BELIEFS</th>
<th>POSSIBLE RESPONSE(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Health</td>
<td>Seldom eat breakfast</td>
<td>Travel schedule often dictates eating; irregularity is a norm</td>
<td>Replace one alcoholic beverage with another beverage of choice</td>
</tr>
<tr>
<td>Lose Weight via Nutrition</td>
<td>Rely on coffee as appetite suppressant</td>
<td>Fewer calories the better</td>
<td>Allocate time to prepare for a snack/meal every 2-3 hours</td>
</tr>
<tr>
<td></td>
<td>“Intermittent fasting” is a norm</td>
<td>Intermittent fasting is good for you</td>
<td>Engage in extended learning around diet and nutrition</td>
</tr>
<tr>
<td></td>
<td>If no breakfast, sugar craving at 3:00pm</td>
<td>Breakfast makes me hungry the remainder of the day</td>
<td>Follow Nicole’s plan</td>
</tr>
<tr>
<td></td>
<td>Binge eating at 6:00pm</td>
<td>Coffee will hold me over; it’s an appetite suppressant</td>
<td>(3 meals around 300 calories and 3 snacks around 100)</td>
</tr>
<tr>
<td></td>
<td>Poor choices with 6:00 binge</td>
<td>I don’t have time to prep meals/snacks when I travel</td>
<td>*adjusted to 2000 calories</td>
</tr>
</tbody>
</table>

**THEORY OF ACTION**

IF I follow Nicole’s plan at 2,000 calories per day with 6 meals/snacks per day THEN I will lose 1-2 pounds per week RESULTING IN better overall health

**MOVES**

Communicate plan with Nicole
Prepare for meals in advance (weekend)
Purchase healthy snacks

**GOALS**

Eat breakfast, lunch and dinner
(350-400 calories per meal)
Eat three snacks at 100-150 calories per meal
**SCHOOL EXAMPLE: SUSPENSION DATA**

For this example, we are focusing on suspension data and start with the first four columns as we look at student data, in this case student suspensions.

<table>
<thead>
<tr>
<th>AREA OF FOCUS</th>
<th>OBSERVATION</th>
<th>BELIEFS</th>
<th>RESPONSE(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TYPE OF INCIDENT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STUDENT SUBGROUPS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STAFF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LOCATION</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Suspension Date 2017 - 2018**

<table>
<thead>
<tr>
<th>School Name</th>
<th>Suspension Rate</th>
<th>Average Incidents per Student</th>
<th>Rate across student subgroups</th>
<th>Average incidents per student</th>
</tr>
</thead>
<tbody>
<tr>
<td>African American</td>
<td>16.9%</td>
<td>2.13</td>
<td>2%</td>
<td>24%</td>
</tr>
<tr>
<td>American Indian or Alaska Native</td>
<td>8.5%</td>
<td>2.46</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Asian</td>
<td>2.4%</td>
<td>1.49</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Black</td>
<td>3.4%</td>
<td>1.87</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>6.7%</td>
<td>1.91</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Pacific Islander</td>
<td>5.8%</td>
<td>1.90</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>White</td>
<td>7.3%</td>
<td>2.74</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Two or More Races</td>
<td>7.9%</td>
<td>2.27</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Not Reported</td>
<td>11.1%</td>
<td>3.00</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>English Learners</td>
<td>4.8%</td>
<td>1.79</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Foster Youth</td>
<td>21.4%</td>
<td>2.93</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Homeless Youth</td>
<td>16.1%</td>
<td>2.15</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Migrant Education</td>
<td>3.1%</td>
<td>1.97</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Socioeconomically Disadvantaged</td>
<td>7.6%</td>
<td>1.92</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Students with Disabilities</td>
<td>17.2%</td>
<td>2.39</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Based on the guidance look at the student data and begin writing in observations first.
QUESTIONS AND GUIDANCE FOR ANALYSIS

For this example, we are focusing on suspension data and start with the first four columns as we look at student data, in this case student suspensions.

AREA OF FOCUS

Observations

Race/Ethnicity

4 groups are higher than district average

AA highest suspension rate overall

Not Reported and AA have 1st and 2nd highest suspensions per student

Program

Foster Youth, Homeless, SWD highest rates

SWD highest suspensions per student

Students/Family Beliefs

1 Why?
Belief: Administrators and teachers are unfair

2 Why are they unfair?
Belief: Administrators and teachers are not comfortable teaching and serving the needs of a diverse student population

3 Why aren’t they comfortable?
Belief: Culturally specific behaviors moderate how teachers and administrators view students

4 Why do culturally specific behaviors influence how these students are viewed?
Belief: Staff doesn’t know, understand, and honor the lived experiences of their students, families, and community

5 Why doesn’t the staff honor the lived experiences?
Belief: All stakeholders are not given the opportunity to collectively develop behavioral and academic expectations or to infuse local community norms and culture into school-wide practices

Racial Ethnicity

4 groups are higher than district average

AA highest suspension rate overall

Not Reported and AA have 1st and 2nd highest suspensions per student

Program

Foster Youth, Homeless, SWD highest rates

SWD highest suspensions per student

Teacher/Admin Beliefs

1 Why?
Belief: AA rate is expected because it mirrors societal outcomes for AA

2 Why does it mirror the outcomes?
Belief: AA do not value education

3 Why don’t AA value education?
Belief: AA are not connected to school

4 Why aren’t AA connected to school?
Belief: AA are not given a voice in decisions about what and how they learn

5 Why aren’t AA given a voice?
Belief: We do not have high expectations for all students
### Technical Changes
- Weekly monitoring of suspension by race/ethnicity and program to create awareness of suspensions
- Admin implements and follows Behavioral Guidelines

### Adaptive Changes
- Establish youth directed system for responding to office referred behavior (i.e. SJC)
- Professional Learning for leadership

### Technical
- Challenge is easy to define
- Can typically be resolved by experts
- Requires little time to resolve
- Professional learning is informative and procedural
- Often faces little resistance
- Can be solved by “top-down” leader moves

### Adaptive
- Challenge is difficult to define (complex)
- Is resolved collaboratively by people not experts
- Requires a lot of time
- Faces resistance
- Leader moves must address changes in beliefs, mindsets, and attitudes

### Area of Focus
- Suspension Rates

### Observation
- Race/Ethnicity
  - 4 groups are higher than district average
  - AA highest suspension rate overall
  - Not Reported and AA have 1st and 2nd highest suspensions per student

- Program
  - Foster Youth, Homeless, SWD highest rates
  - SWD highest suspensions per student

---

**Now that you have completed the first four columns, we will build your Theory of Action. Then identify, goals and moves.**

### Building Your Theory of Action

- A Theory of Action contains the emotional core of what drives people to commit to your intended purpose: the why
- Communicating your core beliefs is the most important thing you can do to inspire stakeholders to action.
- A Theory of Action makes your why, how, and what explicit by explaining your anticipated course of actions and outcomes

### Area of Focus
- Suspension Rates

### Observation
- Race/Ethnicity
  - 4 groups are higher than district average
  - AA highest suspension rate overall
  - Not Reported and AA have 1st and 2nd highest suspensions per student

- Program
  - Foster Youth, Homeless, SWD highest rates
  - SWD highest suspensions per student

---

**POSSIBLE RESPONSE(S)**

1. IF we implement behavior guidelines (What) THEN we will eliminate discretionary responses to behavior (How) RESULTING IN a reduction in disproportionality of suspension rates among AA and SDW (Why)

---

**Using the Chart Your Theory of Action is Produced**

1. IF we implement behavior guidelines (What)
2. THEN we will eliminate discretionary responses to behavior (How)
3. RESULTING in a reduction in disproportionality of suspension rates among AA and SDW (Why)
**LEADER MOVES ARE TECHNICAL AND/OR ADAPTIVE CHANGES. LOOK AT THE QUESTIONS FOR CONSIDERATION AS GUIDANCE WHEN THINKING ABOUT THIS SECTION.**

**THEORY OF ACTION**

**GOALS / PROCESSES AND/OR OUTCOME**

**QUESTIONS FOR CONSIDERATION**

- What obstacles are in the way or making this happen?
- What are the fiscal/time impacts?
- What are the coherence/integration considerations?
- Is there something I can remove/replace to make this happen?
- What do I need to do differently?
- What supports and/or system changes do I need to make these changes successfully?
- What resources will be required?
- Which audience do I need to engage in dialogue about our TOA and why?

<table>
<thead>
<tr>
<th>CHANGE ACTION COMPONENT</th>
<th>PROCESS MEASURES</th>
<th>OUTCOME MEASURES</th>
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</table>
CONTINUOUS IMPROVEMENT: PDSA CYCLE FORM

<table>
<thead>
<tr>
<th>Change Idea Being Tested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Goal</td>
</tr>
<tr>
<td>Tester Name(s)</td>
</tr>
<tr>
<td>Date/Timeframe of the Test</td>
</tr>
</tbody>
</table>

**DETAILS**

Describe the who/what/when/where of this test.

**1 PLAN**

- Predictions: What do you think will happen when you enact this change idea in practice?
- Data to collect

**2 DO**

Briefly describe what happened during the test (surprises, difficulty getting data, obstacles, successes, etc.)

**3 STUDY**

- What were the results?
- What did you learn?

**4 ACT**

Describe any modifications to the change idea and plans for future cycles.
<table>
<thead>
<tr>
<th>PLAN ACTION</th>
<th>OUTCOMES</th>
<th>IMPLEMENTATION/DO</th>
<th>DATA/STUDY</th>
<th>REFLECTION/ACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>JULY</td>
<td>• Plan “Accountable Talk” PD • Develop Look Fors • Create Survey</td>
<td>• Completed PD plan • Completed Look Fors • Completed survey</td>
<td>• Provide the PD • Administer Survey</td>
<td>• Analyze data from survey</td>
</tr>
<tr>
<td>AUGUST</td>
<td></td>
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</tr>
<tr>
<td>SEPTEMBER</td>
<td>Implement Accountable Talk</td>
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<tr>
<td>OCTOBER</td>
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<td></td>
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<tr>
<td>NOVEMBER</td>
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<tr>
<td>DECEMBER</td>
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<tr>
<td>JANUARY</td>
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<tr>
<td>FEBRUARY</td>
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<td>MARCH</td>
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<td>APRIL</td>
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<td>MAY</td>
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<tr>
<td>JUNE</td>
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</tbody>
</table>
As pilot partners seek to scale up and spread their change initiatives, it was important to keep them focused on doing a trial and starting small. Pilot partners focused on working out the issues and problems that came up in the short cycle, allowing them to be more thoughtful and precise as they spread the change to other areas in the LEA. But moreover, it was vital to begin to think about the supports necessary at every level of the system. The teams spent between July 2018 and May 2019 immersed in their short cycles. The plan was for each team to present the results and next steps planned in the implementation of the change action.

THE PROCESS

Pilot partners were asked to present the results of their first short cycle and discuss next steps for implementation. Pilot partners were given time to plan the second short cycle which in many cases included scaling up or spreading the identified change action. They engaged in designing common understanding around clear communication through Potluck Dish protocol (p. 95) and hashtag activity (p. 96-97).

LESSONS LEARNED

Pilot partners struggled to think through the supports necessary for scaling their change actions up and out, therefore, more time was spent on how to sustain a continuous improvement practice. Pilot partners were able to think more about measures to use for impact and implementation in their third and fourth cycle while also considering how to sustain positive impact. The pilot leads directly engaged with the pilot partners on the conversation on sustaining continuous improvement after the pilot partnership as they designed their fourth cycle.

Pilot partners spread the CI work within their LEA through management retreats and Professional Learning Communities (PLC). As a result, educators throughout various levels were able to conduct their own short cycles to identify problems of practice within their LEA. Making the learnings of the pilot partners public with other pilot partners and with stakeholders in their LEA is critical to the work and the unification of LEA communities. To do so, pilot partners were asked to share their LEA profile (p. 87), create a display board (p. 88-89), and a PowerPoint presentation (p. 90-94), to communicate their CI journey.
SPREAD AND SCALE
FACILITATOR’S GUIDE TO THE SHORT CYCLE PRESENTATION AND CRITICAL FRIEND PROTOCOL

Opening Remarks/Framing:
____________________________________________________

Step 1: Presenting LEA’s Short Cycle Presentation (14 minutes)
• Data, Root Cause Analysis, Focus, Problem of Practice, Change Action, Theory of Action, and PDSA including timeline and Data Outcomes vs. Theory of Action/prediction
• Share an issue or concern you have as you plan your next Short Cycle framed as a question.
• Make sure you let the listening LEA know exactly what you want to get from their discussion.

FACILITATOR FOLLOW-UP QUESTIONS (IF NOT ADDRESSED IN PRESENTATION):
1. What is your issue or concern you have as you plan your next short cycle framed as a question?
2. What were your intended results? What were your actual results?

Step 2: Listening LEA Asks Probing and Clarifying Questions (5 minutes)
• Ask questions to learn more about the issue
• Remember to withhold advice

FACILITATOR GUIDANCE
1. Make sure people are asking clarifying (e.g. tell me more about…) or probing questions (e.g. how were you able to…?)
2. What let you know you’ve reached your goal?
3. What’s the best that could happen with your short cycle?

Step 3: Listening LEA Discusses Presenting LEA Question/Issue (10 minutes)
• Each person in the Listening LEA team provides feedback both 3 positives and 1 clarifying/critical.
• Please use a supportive tone and provide practical suggestions.

FACILITATOR GUIDANCE
1. Presenting LEA’s issue or concern they have as they plan their next short cycle is __________. 
2. Our best practice that worked in the past is ______________.
3. I wonder if there might be another issue?

Presenting LEA Takes Notes
Once the listening LEA begins to discuss Presenting LEA’s (issue/concern) question, it is critical that you are not drawn into the discussion. Your role is to listen and take notes. It is very important to try to withhold any reaction to what is being said, but to remain impartial and listen.

Step 4: Presenter Response (5 minutes)
Presenting LEA summarizes the feedback: “I heard you say…” “Overall, I heard…”
Refrain from trying to continue the discussion

Step 5: Debrief (1 minute)
• Facilitator critiques the process (specific positive/constructive feedback)
• What worked, what did not?

FACILITATOR GUIDANCE:
1. Presenting LEA did a great job (e.g. short cycle, plan, focus, providing positive feedback and posing a challenge etc.)
2. Presenting LEA can elaborate more of (e.g. posing issue or concern etc.)

Protocol #2 Partner Lead’s Short Cycle Presentation and Critical Friend - Adapted from Tuning Protocol National School Reform Faculty

SUSTAINING THE CONTINUOUS IMPROVEMENT CULTURE AND THE FIVE CULTURAL PITFALLS PREVENTING YOU FROM SUCCEEDING

1. THE LOW-HANGING FRUIT TRAP
Common during the first phase of CI journey, because the fruit is easy to attain and be a quick and sure win for the team. While randomly picking the low hanging fruit may provide your team with some results it does not build the capacity of the team or allow for systemic habits for improvement.

Where are you and your colleagues?
How do you get out of the trap?

2. THE REALITY ILLUSION
When you assume that another person understands and perceives a situation, event, etc. in the same manner as you do. This fails to account the way facts are perceived vary by individuals, each individual has their own reality.

Where are you and your colleagues?
How do you get out of the trap?

3. THE EMPEROR’S NEW CLOTHES
Most common in organizations that have spent a lot of time and resources to create and implement the ‘right’ structure, tools and methods. While the right tools are being used the purpose behind the work has been lost and/or forgotten, they go through the motions of CI work without deep thought on intention.

Where are you and your colleagues?
How do you get out of the trap?

Adapted from: www.succeedwithci.com/files/culturalpitfallsanalysis.pdf
THE EFFICIENCY PARADOX

Being seen busy, active and stressed are praised. Departments are busy keeping people busy but the organization fails to get much done. There is a feeling of guilt when you reach a moment to reflect.

Where are you and your colleagues?

How do you get out of the trap?

THE FRIENDSHIP FALLACY

People are rarely held to be accountable and responsible with a waning committed towards improvement initiatives. People fear asking of others to avoid possibilities of negative feelings and responses arising out of being asked to do their job.

Where are you and your colleagues?

How do you get out of the trap?

Rethinking Scale: Moving Beyond Numbers to Deep and Lasting Change

by Cynthia E. Coburn

The issue of “scale” is a key challenge for school reform, yet it remains undertheorized in the literature. Definitions of scale have traditionally restricted its scope, focusing on the expanding number of schools reached by a reform. Such definitions mask the complex challenges of reaching out broadly while simultaneously cultivating the depth of change necessary to support and sustain consequential change. This article draws on a review of theoretical and empirical literature on scale, relevant research on reform implementation, and original research to synthesize and articulate a more multidimensional conceptualization. I develop a conception of scale that has four inter-related dimensions: depth, sustainability, spread, and shift in reform ownership. I then suggest implications of this conceptualization for reform strategy and research design.

For many years of intense educational reform, educators, policymakers, and researchers still grapple with the question: how pockets of successful reform efforts might be “scaled up.” This issue has attained an increasingly high profile in the United States with the rise of prominent reform networks (e.g., Accelerated Schools, Coalition of Essential Schools [CES], Center Schools, Success for All, and the New American Schools project) and increased federal funding for research-based comprehensive school change initiatives. Yet as the issue of “scale” emerges as one of the key challenges for educational reform, it remains largely undertheorized in the educational literature (Elmore, 1996; Garmston, 1998).

To date, most educational research that focuses on scale has tended to define it as unidimensional, involving solely or predominantly the expansion of numbers of schools reached by a given reform effort. But taking an external reform initiative to scale is a complex endeavor. It not only involves spreading reform to multiple teachers, schools, and districts as highlighted by conventional definitions, it also involves all the challenges of implementing reform documented by decades of implementation research (Elmore, 1996) and of sustaining change in a multilevel system characterized by multiple and shifting priorities (McLaughlin & Mitra, 2001; Steen, Sato, McLaughlin, & Talbert, 1997). It is the simultaneity of these challenges, in all their complexity, that makes the problem of scale fundamentally multidimensional. While there is a small but growing body of work that raises theoretical challenges to the predominant definition and provides evidence for the multidimensional nature of scale, this work has yet to be brought together and synthesized. Thus, the traditional definition continues to hold considerable weight, framing most empirical studies and forming the foundation of many theoretical discussions on scale.

How educational researchers and reformers define scale matters, for it influences both the ways reformers and policymakers craft reform strategies and the ways researchers study the problem of scale. As Hatch (1998) argues, reformers draw on sets of assumptions—both explicit and unarticulated—about the goals, challenges, and processes of change as they develop strategies for working with schools and districts. Notions of the nature of scale constitute one set of these assumptions and, as such, shape the kinds of choices reformers make. And for researchers, different definitions of scale focus the analytic eye in strategically different ways, suggesting alternative indicators of the processes and outcomes of scale.

In this article, I bring together seeds of an alternative conceptualization from literature on scale with relevant research from reform implementation and my own research to synthesize and articulate an elaborated conceptualization of scale. I argue that definitions of scale must include attention to the nature of change in classroom instruction; issues of sustainability; spread of norms, principles, and beliefs; and a shift in ownership such that a reform can become self-generative. In so doing, I hope to address key issues that research suggests are central to the challenges of implementing and sustaining external reform initiatives in multiple classrooms, schools, and districts. I then suggest implications of this elaborated conception for both research and reform strategy, arguing that it calls for researchers to broaden research designs to capture herebefore neglected outcomes, and for reformers to direct increased attention to additional dimensions of scale that may prove critical to schools’ abilities to sustain and deepen reform over time. Finally, I highlight tensions raised by this conception, tensions that I believe stem from the very multidimensionality of the construct.

Reconceptualizing Scale

Most research on scale tends to define it as “scale up” an external reform in quantitative terms, focusing on increasing the number of teachers, schools, or districts involved (Blum, 1997; Biddle, 1998; Darnow, Hubbard, & Mehan, 2002; Darnow, Stringfellow, McHugh, & Hacker, 1998; Fullan, 2000; Hargreaves & Fink, 2000; Hattig, 1994; Hubbard & Mehan, 1999; Klein, McArthur, & Streeck, 1995; Legters, Ballance, Jordan, & McParland, 2002; McDermott, 2000; Slavin, 1997; Slavin & Farholt, 1998; Slavin & Madden, 1994; Smith et al., 1998).
Stringfield & Datsnow, 1998; Stringfield, Datsnow, Ross, & Snively, 1998). In an admirably concise formulation of the predominant view, Stringfield and Datsnow define scaling up as "the deliberate expansion to many settings of an externally developed schoolwide program that has been found to have a positive impact on numerous outcome measures in a single or a small number of school settings" (1998, p. 271).

Within this conceptualization, theorists differ in whether they define scaling to involve replication of the reform in greater numbers of schools (Copes & Slavin, 1997; Madden, 1997; Fuchs & Fuchs, 1997; Legates et al., Slavin & Madden; Madden, Taylor, & Albin, 1995) or emphasize a process of organizational development (Datsnow et al., 1998; Klein & Smith, 1998; Mead & Simon, 1996; Stringfield & Datsnow, 1998). Whereby schools are encouraged to adapt reform models to the needs of their local context, the variation of this theme incorporates concerns for geographic proximity, defining scale in terms of an increase in the number of schools involved in a reform effort to achieve a critical mass in a bounded area such as a school district (Boothby). But whether by replication or adaptation, within a bounded geographic area or not, at root, for these theorists, the problem of scale tends to be framed, at least explicitly, as the problem of implementing the special needs of many teachers, schools, or districts, involved in this particular reform.

This definition is attractive in its simplicity, its intuitiveness, and its measurability. But what does it really mean to say that a reform program is scaled up in these terms? It says nothing about the nature of the change envisioned or enacted or the degree to which it is sustained, or the degree to which schools and teachers have come to continue the growth over time. By focusing on numbers alone, traditional definitions of scale often neglect other and other significant meanings to scale. It may be fundamentally to the ability of schools to engage in a reform effort in ways that make a difference for teaching and learning.

There is a growing body of work, however, that raises questions about traditional definitions of scale, suggesting, among other things, the need for greater attention to the depth of implementation and a shift in reform orientation (e.g., Elmore, 1989; Elmore, Peterson & McCarthy, 1992; Jackiw, 1993). Thus, bringing reforms into their classrooms, they do so in ways that vary, at times substantially, in depth and substance (Cohen, 2002; Datsnow et al., 1998; Datsnow & Smith, 2000; Elmore, 1996; Elmore, Peterson, & McCarthy, 1992; Jackiw, 1993; Jackiw & Viscick, 1992). In short, this reveals the range of possibilities and the diversity of meanings associated with the use of the term "implementation," and the important implications for the interpretation of the nature of teacher change.

The focus on the nature of change in the context of the definition of scale is particularly problematic given what we know about the challenges of making change in classroom practice. The history of public schooling is replete with evidence of reforms that barely scratched the surface of schooling, failing to reach into the classroom to influence instruction (Cubbin, 1988; Elmore, 1996; Elmore, Peterson, & McCarthy, 1992; Jackiw, 1993). Thus, bringing reforms into their classrooms, they do so in ways that vary, at times substantially, in depth and substance (Cohen, 2002; Datsnow et al., 1998; Datsnow & Smith, 2000; Elmore, 1996; Elmore, Peterson, & McCarthy, 1992; Jackiw, 1993). In short, this reveals the range of possibilities and the diversity of meanings associated with the use of the term "implementation," and the important implications for the interpretation of the nature of teacher change.

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Correnti, Phelps, & Wallace (1999) may also have the potential to suggest educational changes in classroom instruction.

**Sustainability**

As a second element of scale, consequential change must be sustained. The concept of scale primarily has meaning over time. The distribution and adoption of an innovation are only significant if the innovation can be readily understood and then subsequently adopted by schools. Reforms can be adopted without being implemented, and can be implemented superficially only to fall into disuse. Yet, while the idea of sustainability is fundamental to scale-up, few conceptions or models currently appear in theoretical and empirical pieces (Elmore, 1996; McLaughlin & Mitra, 2001, are exceptions). Most discussions address issues of sustainability separately, which obscures the way that scale, in fact, depends upon sustainability. And, perhaps most seriously, only a minority of studies of scale have employed designs that have allowed them to investigate sustainability. For example, of the 44 publications on efforts to scale up external reforms reviewed for this article, only 18 publications involved investigations of schools that had been involved in the reform for 4 or more years. And only 11 explicitly looked at schools involved in reform for which an implementation period with additional resources and attention had officially ended. Instead, most studies focus on schools in their first few years implementing a new external reform, failing, in our view, to capture sustainability. There is also ample evidence that sustainability may be the central challenge of bringing reforms to scale. Schools that successfully implement reforms do not sustain the change in the face of competing priorities, changing demands, and teacher and administrator turnover (Berends, Bedell, & Kirby, 2002; Bedell, 1998; Cazden, 1988; Hamaker & Cohen, 1993; Fink, 2000; Hargreaves & Fink, 2000; Hach, 2000; Healy & DelVecchio, 1997; Lewis & Miles, 1990; McLaughlin, Stenhouse, & Mitra, 1991; McLaughlin, Mitra, 1994; Mitra, 1995; McLaughlin, 1995; McLaughlin & Darnow, 1994; Tyack & Cuban, 1995). Emotionally developed school reforms may be especially vulnerable to this problem because implementation typically involves a shift in the nature of professional development, and other forms of assistance to facilitate implementation that dissipates over time as external developers turn their attention to other sites (Davis et al., 2002; McLaughlin et al., McLaughlin, Mitra, & Stokes, 1995).

This suggests the need for a renewed and vigorous dialogue, not just about the challenges of sustainability, but about strategies for providing schools with the tools they need to sustain the reform, especially after initial infusion of resources dissipates. Interestingly, recent research suggests that depth may play an important role in sustaining change. At the classroom level, teachers with a deep understanding of the pedagogical principles of a reform are better able to respond to new demands and changing contexts in ways that are consistent with underlying principles of reform, than sustaining and, at times, declining reform over time (Cubbola & Meyer, 1998; McLaughlin & Mitra, 2001). But because classrooms are situated in and interact with the broader school system, teachers are better equipped to sustain change when there are mechanisms in place at multiple levels of the system to support their efforts. This includes the presence of a supportive professional community of colleagues in the school that can advocate norms about and providing opportunities to learn (McLaughlin & Mitra; Stokos et al., 1997), knowledgeable and supportive school leadership (Berends et al., 2002; Comer, 1996; Darnow et al., 2002; Fullan & Stiegelbaur, 1990; Hargreaves & Fink, 2000; Jackson, 1999; McLaughlin & Mitra; Munsey & McQuillan, 1996; Murphy & Darnow, 2003), connections with other schools or organizations engaged in reform (Darling-Hammond, 1998; McDonald et al., 1998; Munsey & McQuillan, and normative coherence or alignment between the district policy content and the reform (Berends et al., 2002; Comer et al. Darnow et al., 2002; McLaughlin & Mitra; McLaughlin & Mitra). Thus, it may be possible to use these conditions in schools and districts that support and sustain classroom change over time.

The explicit focus on sustainability as a key element of scale also has implications for research on reform. At this point, it highlights the need for designs that actually allow researchers to assess whether or not changes in schools and classrooms persist over time. Existing studies suggest a range of possible strategies to capture sustainability. In our research on the CDP, we studied schools and districts for 5 years after formal funding for the 4-year initiative had ended. Thus, the schools in the study were in the process of sustaining the reform after an external partner and funding dissipated. Other studies in the literature on scale employ designs that seek to sustain the reform over a range of experience participating in the reform (Cooper et al., 1994; Darnow et al. 2000). For example, in a mixed-methods study of innovative artistry and school reform, it was found to be essential to follow relationships that are important for choice and cultural or institutional approaches to teaching and learning in significant ways. But such studies rarely present strategies for identifying different reformers. For example, it suggests a different way to think about the role of the district in spreading reform effort. Typically, reformers have focused on the degree to which the district can provide support or protection for schools implementing a reform (Bedell, 1998; Hach, 1998; McDonald et al., 1999; Olson, 1998; Slavin & Madden, 2001). We also also provide researchers and policy makers with insights into the future. But how do these changes differ as reformers mature and initial energy, personnel, and resources decline? Such insights could be critical for understanding the extent of conceptualizations of scale. Sustainability.
and of authority for the reform. These discussions of ownership are often initiated by new basic or initial adoption and implementation (e.g., how to ensure teacher "buy-in") rather than long-term sustainability and growth (e.g., how to develop capacity and infrastructure to maintain reform in the face of constantly changing priorities). In addition, reformers have tended to have been much more concerned about how to develop their own capacity to continue to provide professional improvement and technical assistance as reform spread (Bodily, 1998; Olson, 1994b; Slavin & Madden, 1996, 1999; Stringham & Diamon, 1999)—that is, grow geometrically with the number of schools in which to work, how to work with schools and districts to develop the capacity necessary for them to assume authority and knowledge for the reform.

Although this component of scale is rarely explicitly incorporated into studies of attempts to take external reform efforts to scale, there are a few studies that provide hints about what such a transition might entail. Davis and Gomez (1995) describe a scale-up strategy that hinged on developing a suite of knowledgeable teacher leaders who, over time, assumed responsibility for providing ongoing professional development to teachers new to the initiative (Gibbons, 1998, on this page). Given high rates of teacher and administrator turnover in some communities as well as experienced teachers' needs to deepen their approach over time (Muncy & McGinnell, 1996), it is likely that teachers and administrators will need ongoing professional development to sustain, deepen, and spread reform. This suggests that developing the capacity to provide reform-related professional development for ongoing teacher and administrative learning may be a central feature of shifting authority and ownership for the reform.

In another study, McLaughlin and Nitta (2003) point out that teachers need time for ongoing transformation, a key leadership and modal way to draw upon that knowledge in ongoing decision making (McLaughlin & Mitra, 2007). Teachers and leaders in the school leadership need to exercise this reform-centered decision making as they work to sustain practice in the face of new circumstances, initiatives, and priorities that may or may not conflict with reform. For example, the leaders of the CDP suggests that leaders in depth understanding of reform principles were better able to negotiate new policy and reform initiatives to ascertain the degree to which they aligned with the CDP, rejecting or altering initiatives that they deemed inconsistent and wrought the CDP into new initiatives and priorities that appeared congruent (Gibbons & Meyer, 1998). Furthermore, schools and districts may need this depth in substantive and strategic decision making if they are to fully take on the responsibility of sustaining reform over time.

Finally, this scale-up opportunity may require that schools and districts develop the capacity to generate continuous funding for reform. Many reform efforts are supported by external grants or policy initiatives that are finite. Yet, activities such as ongoing professional development and other efforts to spread and deepen reform also require funding. Thus, reform ownership may require the capacity to think creatively about reallocating existing resources to support ongoing professional development and the additional grant funding to support activities that deepen and spread reform over time (Cuban & Meyer, 1998).

All of this suggests that depth of reform-centered knowledge—one not only at the classroom level but also among leaders at multiple levels of the system—is a key element in shifting ownership and authority of reform. It further suggests that shift in ownership and authority of reform is a central strategy to spreading and sustaining reform in the face of shifting priorities, changes in funding, and challenges to policy coherence.

With this concept in mind, the implementation of scale raises the priority for directing reform attention and resources to strategies that have the potential for enabling schools and districts to assume ownership for the reform over time. To date, discussions of the shift from external to internal have been relatively absent in the literature, and yet, there are many strategic questions to consider. What strategies are effective in cultivating the capacities necessary to assume authority for reform? Are there strategies different at different levels of the system (classroom, school, district)? Should they vary for different kinds of reform? How can reformers lay the groundwork for a shift from external to internal from the early days of engagement with a school or district? This reconceptualization of scale also has implications for researchers. Shift in reform ownership has rarely been incorporated into studies of attempts to take external reform efforts to scale, and thus, it represents a new outcome for studies of scale. Existing research suggests several preliminary indicators for shift of reform ownership at the school and district levels: (a) the presence of entrepreneurs and mechanisms for ongoing learning (e.g., professional development, teacher study groups); (b) the presence of integrated strategies to provide continued professional development and to sustain reform efforts over time, often taken responsibility for continued spread of reform; and (c) the use of reform-centered ideas or structures in school or district decision making. However, more research is clearly needed to elaborate, extend, and validate these indicators.

Discussion

The problem of scale remains one of the most pressing issues in educational reform and improvement. In an effort to capture the multidimensional nature of the problem, I offer an elaborated conceptualization of scale. The ideas that follow in this section are more broadly applicable and may reach more widely but also more deeply into schools to effect and sustain consequential change. It emphasizes the spread of ideas, theories, and practices across a range of settings (classroom, school, district) and across levels (classroom, school, district). It includes an additional outcome—the shift in ownership—that may prove key to school's and districts' ability to sustain and spread the reform over time. By highlighting this expanded conceptualization brings them to the forefront of discussions of reform strategy, articulating goals and raising questions about effectiveness and applicability. In this section, I also highlight inherent tensions for both researchers and reformers.

For researchers, this conceptualization emphasizes dimensions of scale that are more challenging to measure. It is more challenging to measure the changes in scale and the changes in engagement in particular than the presence or absence of activities or materials. It is more challenging to measure the spread of norms of interaction than the number of teachers or schools involved in an initiative. And it is arguably more challenging to measure the shift in authority and knowledge of reform than reform adoption and sustainability. There are also trade-offs in resources, time, and efforts. Budget constraints and the inherent ownership and scale of capture depth and shift in ownership, most often qualitative, tend to be more expensive and time consuming than survey and other quantitative methods to capture breadth and depth.

But it seems important to wrestle with these challenges to ensure that we develop research designs that capture what is important rather than only what is easily measurable. To that end, we need continued conceptual and methodological development to identify and validate measures of such heretofore neglected dimensions of scale as spread within schools and districts, and shift in reform ownership at multiple levels of the system. We need to explore creative and cost-effective ways to study schools that have been engaged in reform initiatives for more than a few years. And if our argument is persuasive that we need to investigate the multiple dimensions of scale to fully understand the long-term dynamics and success of reform scale-up, we need a continued dialogue on how to strike the appropriate balance between depth and breadth.

For researchers, there are also tensions. Like researchers, reform organizations must navigate the tension between breadth and depth. The capacity building at multiple levels of the system that may make the number of teachers or schools involved in an initiative expensive and resource-intensive, which may limit developers' ability to expand as broadly (see Conner et al., 1996; McDonald et al., 1999; McQueen & McGinnell, 1998; Slavin & Madden, 1999; for further discussions on this point). This tension may grow increasingly acute as the more the reform diverges from existing practice and the more complex or comprehensive the reform's approach becomes. For example (Cuban, 2000; Cuban, 1994). That is, the more challenging a reform is to teachers' existing beliefs and practices, or the more aspects of classroom practice or levels of the system is engaged, the more it may need well-developed materials and sustained, ongoing professional development to achieve depth. Similarly, reforms of this nature may require more effort on the part of reformers to work with multiple levels of the system to understand, support, and sustain "sustainability." This suggests that the more ambitious a reform, the more challenging it may be to simultaneously achieve spread, sustainability, and depth. It is possible that some of the tension between breadth and depth may be captured by thinking through the design of the reform itself. For example, the more that knowledge and guidance is built into the reform via greater elaboration or even scripting, the less reformers may need to invest in professional development. But this approach is aimed at reforming the reforms, absent some mechanism for feedback and other initiatives and others in the system to learn pedagogical principles and norms from the reform, it may be difficult for them to develop the capacity for replication and dissemination of the reform. Similarly, this approach does not address the challenges of normative coherence at multiple levels of the system.

Finally, there are also tensions between reform ownership and funding, especially when additional funds are needed to build and sustain particular activity structures. As knowledge and authority shifts from external reform organization to school and district personnel, the decisions about reform ownership, sustainability, and potential to adapt or adopt no longer lie with the external reform organization. For reform organizations that advocate fidelity to underlying norms or principles, this is not troubling as long as school and district reformers have deep reform-centered knowledge. With such knowledge, teachers and others will theoretically be able to make decisions about the reform in ways that remain faithful to guidelines and specifications. In contrast, the shift in ownership and authority is making decisions about the reform in ways that remain faithful to guidelines and specifications. Finally, there are also tensions between reform ownership and funding, especially when additional funds are needed to build and sustain particular activity structures. As knowledge and authority shifts from external reform organization to school and district personnel, the decisions about reform ownership, sustainability, and potential to adapt or adopt no longer lie with the external reform organization. For reform organizations that advocate fidelity to underlying norms or principles, this is not troubling as long as school and district reformers have deep reform-centered knowledge. With such knowledge, teachers and others will theoretically be able to make decisions about the reform in ways that remain faithful to guidelines and specifications. Finally, there are also tensions between reform ownership and funding, especially when additional funds are needed to build and sustain particular activity structures. As knowledge and authority shifts from external reform organization to school and district personnel, the decisions about reform ownership, sustainability, and potential to adapt or adopt no longer lie with the external reform organization. For reform organizations that advocate fidelity to underlying norms or principles, this is not troubling as long as school and district reformers have deep reform-centered knowledge. With such knowledge, teachers and others will theoretically be able to make decisions about the reform in ways that remain faithful to guidelines and specifications.

The research agenda on scale is still in the process of formation. With the growing number of external reform with a longer history of development and use, conditions are ripe for studies that grapple with the challenges of creating research design to better explore the multidimensionality of scale. With attention to this multidimensionality, research can begin to speak more clearly and persuasively about the tensions and tradeoffs involved in different strategies to take reform to scale.

NOTES

This study springs from a multi-year collaboration with my colleagues Ellen Meyer. Several of the analytic insights discussed here were developed together, as was the first draft of this article. I am grateful for all her contributions. In particular, I thank Tom Gilmore, Nathan MacBrien, Milbery McLaughlin, Laura Stokes, four anonymous reviewers, and the editors of Educational Researcher for continually improving the manuscript. I am also grateful to the Tennessee Educational Commission of Schools, the National Center for Education Statistics, the National Clearinghouse for Comprehensive School Reform (www.ncscren.org), the National Science Foundation, the School of Education and the Learning Research and Development Center at the University of Pittsburgh, and to countless colleagues who helped shape this project. I also thank the Coalition of Essential Schools (McDonald et al., 1999; Olson, 1994b; Slavin & Madden, 1994).

1. To identify the CDP, which reached the ERCB database (1992-2002) using the following descriptors: "scaling up," "scale-up," "scale," and "innovation." (A rather simply using the term "scale" was not practical for the ERCB database as it elicited 7,097 hits, many of which had to do with measurement issues.) I also reached the National Clearinghouse for Comprehensive School Reform (www.ncscren.org) and used the descriptors: "scaling up," and "scale-up." I then reviewed reference lists from the resulting studies, yielding many additional citations. Finally, in order to avoid redundancy about some of the existing work for the final version of this book, I searched the publication lists of the top 10 scholars published.
... who publish books on educational research and reform. From all these sources, I selected only those pieces to review that meet the following criteria. First, publications needed to be focused on the process or outcomes of school reform. Second, school reform efforts focused on improving classroom instruction. Thus, I excluded articles focused on race and district policy (such as standards and accountability programs) and those that focused on extraneous factors such as testing programs, governance structures, or school-community collaborations. Second, because I was interested in different genres, I excluded articles focused on research methodology, position papers, conceptual or descriptives articles on reform strategies. In all, 48 books, articles, or book chapters from 15 different empirical studies, 18 policy papers, and 15 conceptual articles on the topic of school reform met these criteria and, therefore, were included in the review.

... Source: Cohen and Ball (2000) for a more extended discussion of this point. Some reformers also argue that concentrating spread within a district is too easy to distort the normal and focus resources devoted to managing the necessary logistics of spreading innovation, buffering the likelihood of sustainability and spread (see Beddy, 1998)."


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### AT A GLANCE LEA PROFILE

#### LEA

#### FOCUS

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<th>Next Steps/Sustainability:</th>
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DISPLAY BOARD EXAMPLE

Short Cycle 1
VUVHSD Math Academic Connections Implementation

- Develop curriculum aligned with standards
- Implement differentiated instruction
- Provide professional development for teachers

Short Cycle 2
VUVHSD Math I/MAC Student Interviews & Teacher Surveys

- Conduct surveys to gather feedback
- Analyze data to identify areas for improvement
- Implement strategies to address student needs

Short Cycle 3
VUVHSD Math I Investment Strategy Implementation

- Allocate resources for program development
- Monitor budget to ensure funds are used effectively
- Evaluate impact of investment on student outcomes

Short Cycle 4
VUVHSD Next Steps

- Continue to expand continuous improvement cycles
- Partner with community leaders
- Foster collaboration among stakeholders

VUVHSD Profile

- Eight Public Schools
- Approximately 10,300 students
- Approximately 1,100 staff members
- Numerous awards and accomplishments
- Approximately 85% Free and Reduced Lunch

Hispanic Latino - 65%
African American - 20%
White - 8%
Asian - 2%
Two/More Races - 3%
Other - 2%
Foster Youth - 1.5%
Homeless - .9%

The Victorville Way: Our C. I. Model

- Refine
- Plan
- Do
- Study
- Corrective Action
- Analyze
- Difference
- Establish Objectives
- Plan Processes with Key Performance Indicators (KPI)

- Study Actual Results
- Compare Against Individual Results
- Implement the Process to Improve the Process Measures

Continue to expand continuous improvement cycles in the district as a way for managers to share and refine their work:
- District
  - Human Resources - staffing
  - Business Services - interim reports
  - Ed Services - curriculum
- Sites
  - Alignment of SPSAs with LCAP and Strategic Plan
Pilot Partners used the flowing layout to share their CI work.

**Continuous Improvement Journey**

**District Profile**
- An overview of your District to include the demographic breakdown and totals. (Ex. total # of students, FR Lunch, Student demo breakdown, # of staff) Map view/Location of district in reference to greater California.

**Our Problem of Practice**

**(District Name) CI Model**
- ACT
- PLAN
- STUDY
- DO
PURPOSE
The process is designed to establish a common understanding around the importance of clear communication.

Time
15 minutes

Materials
• Sticky Notes
• Pens

Roles
Timekeeper/facilitator, who both participates and keeps the process moving.
Participants will need to describe their potluck dish in under a minute.

PROTOCOL
1. Each participant writes the directions for making their family classic potluck dish on a sticky note.
2. Beginning with the facilitator, each participant at the table shares his/her potluck dish.
3. The group identifies one specific dish to share with the larger group.
4. Facilitator informs the larger group, to listen for dishes they would like to make, and see if they can ascertain how to make the dish from what is shared.
5. Group 1, shares their potluck dish and directions to make it with the larger group. Each group shares their potluck dish.
6. Facilitator asks if anyone heard a dish they would like to make.
7. When someone volunteers, the facilitator asks them if they can repeat how to make the dish.
8. The person who owns the potluck is asked if they did everything they just stated, would the dish be potluck ready.
9. Repeat 7 and 8 as time allows.

DEBRIEF
How was this a useful way to explore the importance of clear communication?

THE POTLUCK DISH PROTOCOL
OBJECTIVE

Partnership teams will be able to:

• Realize their ability to create digital content related to their district’s continuous improvement work, i.e. areas focus, engagement, high level action(s), evidence

• Analyze and evaluate how ‘hashtagging’ can be a tool for engagement/promotion of CI work and school pride/identity

Essential question

How can LEAs create and use social media hashtags to engage with their stakeholders?

Social Media Survey Check

The types of social media platforms that exists for each partnership LEA team. Do they use it often? Do they create the content?

I will present an example: Poway Unified High School District #TeamPUSD

Vocabulary Check

Hashtag (noun) on social media websites, a word or phrase preceded by a hash mark (#), used within a message to identify a keyword or topic of interest and facilitate a search for it.

Trending (adjective) widely mentioned or discussed on the Internet, especially on social media websites–i.e. trending topics on Twitter

Repost (noun) to share or resend a message, link, image etc. on message boards, i.e. retweet

Materials

Campaign design handouts
Cell phones (teams will use their smart phones)
Twitter account – personal or LEA (optional)
Laptop connected to projector screen
Post-it easel pads
Markers

Team Time Lesson

As social media engagement among school communities continues to rise, LEAs should be more involved in creating hashtag campaigns. These social media campaign can be effective in generating stakeholder engagement, spreading awareness, and influencing action. In this team time activity, partnership teams will design their own campaign based on their CI work.

Team Time Procedure

(Refer to the Campaign Design handout)

TEAM TIME ACTIVITY

# THE HASHTAG CHALLENGE #

Campaign Design

1. Reflect on your team’s CI work thus far. Pinpoint ONE overarching theme to form the basis of your hashtag campaign for Twitter and/or Facebook. The theme could be related to your team’s focus, stakeholder engagement, or a high-level action, etc.

2. Once a theme has been pinpointed, write down the answers to these questions.

Getting at ‘The Why’

Why is this campaign important? ______________

Determining ‘The Who’

Who is the intended audience? Who do you want to engage with? ______________

Tackling ‘The How’

Based on your team’s WHY and WHO, brainstorm possible hashtags for your campaign. Select the team’s favorite hashtag. Use a marker and write it on a large Post-It.

3. Take pictures! Use your smart phones. Go outside or inside & take pictures that reflect how the work at the summit is connected to your overall hashtag campaign. GET CREATIVE!!!!

4. Select 1-2 images to use for a hashtag campaign post. Email picture(s) to: ______________

5. Create a post (text + hashtag) to complement the picture(s). The post should a) inform your stakeholders and b) generate engagement

6. Finally, use a marker and write the post under your chosen hashtag on the large Post-It.

COMMUNICATING TO INFORM & ENGAGE

COMMUNICATING TO INFORM & ENGAGE:

HASHTAG CHALLENGE

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REFERENCES


Fishbone. (February 2015). HTeCV Improvement Research Team.


Working to strengthen the System of Support for every student.