

## **Memo on Evaluation Activities for the HQOIM Evaluation**

### **June 30, 2023**

WestEd is pleased to offer this Initial Implementation Evaluation Memo for the High-Quality Online Instructional Materials (HQOIM) initiative to the California Collaborative for Educational Excellence (CCEE). For the past year, our team has worked with the Kern County Superintendent of Schools (KCSOS) implementation team to provide formative evaluation information that they could use to plan and refine their implementation efforts. This memo outlines our efforts and a few of our initial findings. A more complete report will be delivered on July 15, 2023, as agreed with CCEE leadership at our meeting June 27, 2023. That report will expand on this memo and add a section on implications and recommendations.

Under our current contract, WestEd sought to assist KCSOS in their HQOIM work by:

- understanding KCSOS planning for the HQOIMI implementation and initial implementation activities,
- developing initial measures of system implementation and use,
- developing protocols to collect interview and survey data from participants,
- obtaining IRB clearance for the study,
- working with KCSOS to develop to track key project tasks and milestones under their contract with the California Department of Education (CDE)
- collect participant views on what an HQOIM system needs to include to increase the usefulness, ease of use, and actual use of the system by coaches and teachers,

### **Evaluation Approach**

We designed the evaluation to work with CCEE and KCSOS to understand how teachers envision using and ultimately do use the system. Some of the challenges we anticipated for the implementation team included creating awareness about the system, engaging teachers to participate in training activities, designing an easy-to-use and useful system, encouraging teachers to use the system, understanding if and how the system helps teachers develop lessons for students with diverse needs, and building a system that is seen as a standards-aligned resource.

In the initial planning stage of the project, the key evaluation questions were:

1. How is KCSOS engaging with key participants in planning the HQOIM system?
2. What are the primary tasks and milestones for the HQOIM?
3. What barriers and facilitators of the implementation have participants identified?
4. Has the KCSOS developed a transparent process for vetting?

As the project moved into its early implementation stage, WestEd planned to address an additional set of formative evaluation questions:

5. Has the KCSOS developed measures to understand the user experience of the CaET system?
6. How do participants assess the quality of professional learning provided to support using the HQOIM system?
7. How do participants assess the quality of materials and professional learning to support diverse learners?
8. What recommendations do participants have for improving the technology, content, or professional learning and support related to the HQOIM system?

### Evaluation Activities

WestEd hosted a kickoff meeting in the summer of 2022. Following that meeting, WestEd reviewed KCSOS HQOIMI implementation plans and developed the HQOIMI logic model (see next page) linking activities to desired outcomes. We anticipate revising this with KCSOS and CCEE over the summer of 2023.

Once KCSOS signed their contract and began work in November 2023, KCSOS provided working documents and asked WestEd to join the HQOIM leadership in their monthly meetings. When the advisory board was formed, WestEd participated in those meetings.

As the project began, KCSOS had already developed a lesson plan rubric. Over the first few months, they worked with the newly formed advisory committee to review and refine the rubric in preparation for the first lesson design institute in February 2023.

WestEd developed quick 3-question protocols for participants to assess the institute and additional protocols for participant focus groups. WestEd prepared a data security plan and IRB submission in preparation for data collection. Under IRB rules, the project was deemed exempt, and we were free to collect data.

Following the institute, WestEd prepared a memo outlining the key findings from the participant responses and helped KCSOS interpret the findings to make appropriate adjustments to the institute design. WestEd also participated in the March and May institutes, collected participant data, and provided formative evaluation information to KCSOS.

In May 2023, WestEd developed interview protocols for key participants, including the advisory board members, the CDE representative, key leaders, administrative staff in KCSOS, and outside consultants working with KCSOS. The interview questions were designed to gather participants' understanding of project goals and status, what has gone well and what has been challenging, and what additional support is needed for this project to succeed.

HQOIM-LOGIC-MODEL				
Kern County Office of Education				
The California Education Repository will hold vetted and curated high-quality open-source resources by content area, grade level, and cluster.				
INPUTS	OUTPUTS	OUTCOMES		
	Activities	Short-term	Medium-term	Long-term
<ul style="list-style-type: none"> <li>• Kern County Leadership</li> <li>• HQOIM Project Leader</li> <li>• HQOIM Advisory Team</li> <li>• California Educators Together Website</li> <li>• Support from CDE and SBE with CCEE</li> <li>• One Learning Community (OLC)</li> </ul>	<ul style="list-style-type: none"> <li>• Research/Revise IT Platform</li> <li>• Design systems for sign-on, navigation, materials submission, and ratings</li> <li>• Develop a new vetting process, rubrics, and training</li> <li>• Recruit and train workgroups to vet content</li> <li>• Develop outreach campaign and Professional Development materials to increase use</li> <li>• Develop new website analytics to monitor access, use, and usefulness of materials</li> <li>• Recruit schools for best practice training videos</li> </ul>	<ul style="list-style-type: none"> <li>• Workgroups vet content across subject areas for K-12 teachers</li> <li>• Educators learn of and begin using the system in more significant numbers</li> <li>• Educators are satisfied with the quality of materials, the usefulness and ease of use for the site, and the training to use the materials</li> <li>• Site addresses teacher needs for quality instructional materials</li> <li>• Site provides equitable instructional and learning materials for students</li> </ul>	<ul style="list-style-type: none"> <li>• Teachers understand and make routine use of the HQOIM system</li> <li>• Teachers source a greater percentage of supplemental instructional materials from the HQOIM system</li> <li>• Increasing number of educators submit materials for vetting, and provide ratings for the materials they use</li> <li>• Increases equitable instructional opportunities and resources for students to promote access and learning</li> </ul>	<ul style="list-style-type: none"> <li>• Improved student outcomes</li> <li>• Improved sharing of best practices and free, curated resources for educators and county offices of education</li> <li>• Aligned, strengthened, and enhanced system of support and statewide infrastructure professional learning</li> </ul>

## Evaluation Changes

One component of our initial evaluation plan, developed before we knew what KCSOS would implement, called for the development of HQOIMI Participant Advisory Teams (SAT). The evaluation team may still develop such teams but did not do so this year because it did not align with the KCSOS implementation approach. The evaluation team is

discussing asking some of the teachers from this year's institutes to participate in a series of ongoing focus groups to gauge the progress of the project from a teacher's point of view over time. These ideas will be discussed with KCSOS and CCEE.

### **Learning from Participants**

To understand staff experiences with project implementation, the WestEd team spoke with the core project team and members from KCSOS and CDE. The team shared their understanding of the project's mission and goals, their progress and successes, and the key challenges that they have faced. The following section highlights some key findings from these conversations and the current project status. Our full evaluation report on July 15, 2023, will cover our findings in more detail.

Project achievements have included developing and testing a rubric for high-quality lessons, planning and conducting lesson design institutes (LDIs), and beginning to partner with other organizations. The KCSOS team also noted that they still need platform refinements and outreach, piloting a vetting collaborative, and addressing additional ways to integrate diversity and equity strategies into professional learning.

Some of the significant achievements include:

- Rubric and vetting processes established, tested, and refined
- Three Lesson Institutes held February – May 2023
- As of April 2023, 252 new rubric-aligned lessons created
- 2, 938 existing platform lessons vetted (out of approx. 27,200)
- 779 new resources (e.g., on the platform or embedded in lessons)

Support and engagement for project efforts have come from a variety of sources. New resource providers and partners who have joined efforts include OpenScieEd, World Champion Magician, The San Diego Science Project, SEAL, and the 21<sup>st</sup> Century California School Leadership Academy. With expanding support and networks, the team sees opportunities for the work to scale and grow, such as with County offices of education and incoming LDI partners who can help advance a train-the-trainer model to expand the reach for professional learning and lesson development.

As the work continues, the KCSOS team plans to focus more on the big picture and understanding CCEE and CDE's long-term goals for the work. They also aspire to strategically invite more players to conversations and participants to help support efforts,

such as folding external initiatives into the lesson plan institutes in ways that leverage and braid efforts. However, the team also understands that as partners and interest in the rubric and institutes grow, so will the need to address and continuously respond to feedback.

Finally, the KCSOS team is also looking at different strategies to scale the lesson plan institutes and bring more attention to the CaET platform. There have already been conversations with the CCEE and CDE around establishing a regular cadence for project updates and input to foster support and cohesion. Alongside plans for a marketing campaign, the KCSOS team is looking to the CDE and educational partners to help drive resources and traffic to the website.

### **Lesson Design Institutes**

To date, the KCSOS team has run three lesson design institutes (LDI) in 2023, two virtual in February and March and one in-person in May, with the aims of producing more high-quality teacher-designed lessons for the CAET website, developing and instantiating what constitutes a high-quality lesson, and promoting the CAET site and mission. The institutes bring together teachers to provide professional development on high-quality lesson creation and to support them in creating lessons.

Overall, if CAET's primary purpose is to support teachers and the lesson design institutes are the current mechanism for doing that work (until the website is ready for widespread use), KCOSO has succeeded. From the first institute, teachers raved about the quality of the professional development they received during the LDIs. As detailed in our full report, as the KCSOS team continually improved on the institute's structures and materials, teachers reported experience reflected those improvements.

The lesson design institutes are supported by two organizing tools- the Lesson Planning Tool (LPT) and the Lesson Plan Rubric. The LPT organizes lesson material for the site to create uniformity and ease for teachers creating and using the lessons. It also guides teachers through all the elements needed for the lesson to be considered high quality. Reviewers use the rubric to evaluate the lessons' quality and provide feedback to the lesson creator. Together these tools instantiate the projects' definition of high quality by communicating the design principles to the teachers creating the lessons and the reviewers vetting them. These tools have evolved with input from the Advisory board members and feedback gathered during each institute.

Each LDI encompasses 12 hours over two consecutive days. Participant time during the institute is organized by the “chunk and chew” principle- in which participants are presented with information essential to filling out a section of the LPT by an expert and then provided the opportunity to complete that section. For example, in the most recent in-person institute, participants watched a video about the importance and underlying principles of Universal Design for Learning (UDL). An expert then walked them through three supporting documents- a UDL handout, the sections of the LPT about UDL, and the rubric elements about UDL. Then they had time to dig into their lesson and fill out the UDL section of the LPT for their lesson.

Participants are grouped by subject and grade band for this work, either at tables or in Zoom rooms, and are joined by a knowledgeable KCSOS staff member. The participants worked in a Google doc, and the staff member monitored their work, offering suggestions and answering any questions in real-time.

Lessons are vetted using the Lesson Plan Rubric. Currently, KCSOS staff are completing the vetting – after beginning with assessing the lessons posted on the platform prior. This work allowed them to refine and consider the vetting process at scale.

### **A Glimpse of Teacher Experience**

In the reflection data from the first lesson design institute held in February, teachers lauded the quality of the material. However, 7 of the 27 participants mentioned they felt “rushed.” In response to the question “What stands out from today?” one teacher wrote, “The breakneck speed of the work and not enough time to reflect and write.” Teachers felt overwhelmed by the work they needed to complete to make a lesson.

After the third lesson design institute held in May, no teachers mentioned being rushed, while many discussed the breadth and depth of the information provided. One teacher wrote, “I love all the resources you provided. I need time to process all of it. I really appreciate that you are walking us through each step of the process.” The appreciation for the resources and the “chunk and chew” process is reflected throughout the May LDI teacher responses.

### **Next Steps**

What is presented here is a summary of our findings from the evaluation. Our report will elaborate on the findings, highlight some implications, and provide recommendations to KCSOS, CCEE, and CDE to support the HQOIM development.

## Key Findings, Implications, and Recommendations on the High-Quality Online Instructional Materials Initiative

July 15, 2023

WestEd is pleased to offer this executive summary of key findings from our evaluation of the High-Quality Online Instructional Materials Initiative (HQOIM), along with a set of recommendations to strengthen the implementation of this work. This summary builds on our June 30, 2023, Initial Implementation Evaluation Memo for the HQOIM initiative to California Collaboration for Educational Excellence (CCEE) and our June 15, 2023 presentation on the HQOIM initiative at the convening of CCEE, the California Department of Education (CDE), the Kern County Superintendent of Schools (KCSOS), and WestEd.

“The Contractor will develop and curate easy-to-use resources for local educational agencies and educators, develop a transparent process for vetting materials to ensure quality and alignment with state academic standards...maintain a repository of identified materials for use by local educational agencies and educators, and provide guidance and resources for local educational agencies and educators regarding the implementation and use of open educational resources...”

from the KCSOS contract

### Key findings

#### **Finding 1: KCSOS has made progress toward goals.**

In seven months, KCSOS has achieved several goals. They hired and trained team members and created a structure for the team to implement their contracted plan. They created an advisory board to guide the project. They created and refined a lesson plan rubric to guide the quality of lessons and a lesson plan template for developing lessons. They created a process to vet lessons and successfully designed and launched Lesson Design Institutes.

The team members we spoke with particularly viewed the lesson plan rubric and the Lesson Design Institutes as their critical successes. The rubric development took many

iterative improvements to norm definitions of high-quality content and lessons. The same held for launching and refining the lessons institutes and the vetting process to review lessons.

Some of the significant achievements include:

- Lesson plan rubric and vetting processes established, tested, and refined.
- Three Lesson Institutes held February – May 2023.
- As of April 2023, 252 new lesson plan rubric-aligned lessons were created.
- 2,938 existing platform lessons vetted (out of approx. 27,200).
- 779 new resources (e.g., on the platform or embedded in lessons).

In addition, the KCSOS team began to develop new partnerships with various organizations, including OpenScieEd, World Champion Magician, The San Diego Science Project, SEAL, and the 21<sup>st</sup> Century California School Leadership Academy. With expanding support and networks, the team sees opportunities for the work to scale and grow, such as with COEs and incoming institute partners. These partnerships are organized to advance a train-the-trainer model to expand the reach for professional learning, garner more lessons and resources for the site and increase CaET's visibility.

**Implication:** KCSOS's accomplishments in the first seven months position them to begin scaling the work to accelerate the population of the California Educators Together (CaET) repository. They have an experienced team, an involved advisory board, a process for refining the lesson plan rubric, a refined experience for teachers in the lesson design institutes, a process for vetting materials, and new partners to help create materials for the CaET repository.

### **Finding 2: Lesson Design Institutes provide valuable PD.**

The lesson design institutes impressed the teachers who participated. One teacher said after the May session, "This...is very well organized and thought out. I appreciate the deliberate choices with the modeling classroom call and response, the presentation, the rubric design, and the handouts. Very impressive." The teachers we spoke to said they would be willing to continue learning with the group. They also said they would recommend colleagues attend the institute and thought the institute could be part of new teachers' induction.

The institutes provided a place to bring teachers together to innovate and learn from one another. Teachers told us they value engaging with each other in the development of lessons. They also said they are excited about finding a site with teacher-developed



materials that address standards. Teachers trust teachers, and that cannot be lost in discussions about creating and making accessible, high-quality lessons and materials.

One welcome development noted by the KCSOS team is that the Lesson Design Institutes are helping to create professional learning communities around high-quality lessons and lesson design. A staff member noted, “I'd say on the onset, we thought we're gonna go and really just build lessons. ... What I've really come to understand is it's not just that... We're also building a community and a following... which is an incredibly important piece that we can't lose... You can have all the lessons in the world. But if nobody's going to come, it doesn't matter.”

**Implication:** The professional development created for the Lesson Design Institutes may anchor California's state-wide professional development on understanding and designing high-quality lessons that meet the needs of students with different abilities and language skills. Professional learning communities offer an avenue to scale up the development and vetting of lessons and increase CaET visibility and relevance to teachers.

### **Finding 3: Quality is a core concern.**

The KCSOS team, in collaboration with their advisory board, spent a good deal of effort developing quality standards for lessons that include grade-level content standards, strategies to support English Learners with integrated English Language Development, and an equity lens using Universal Design Language. Over several months, the team developed and refined these standards into a Lesson Plan Rubric.

The CaET Lesson Plan Rubric anchored the lesson planning tool during the lesson design institutes. KCSOS also used the rubric to vet a selection of the resources on the site. Having not just materials but materials that meet a standard of high quality on the site is of central concern to the team. In the future, KCSOS will use the standards in the Lesson Plan Rubric to vet materials and indicate which ones meet standards.

The challenge for KCSOS is that the CaET site has an extensive material repository developed over many years under different standards. Much of the material on the site does not meet the quality standards in the Lesson Plan Rubric. In an audit of the CaET materials, KCSOS found that only 4% of a sample of 1296 materials currently in the repository meet the standards in the Lesson Plan Rubric. In addition, the current repository does not have widespread coverage for all grades and subjects.

**Implication:** The KCSOS team has placed quality at the center of their work – and has leveraged their advisory team for support. If the CaET site is to represent the state, then the lesson plan rubric is a tool of great importance, one whose development could be

supported by the CDE curriculum staff. KCSOS needs to keep increasing the number of high-quality materials across grades and subjects on the CaET platform, make sure teachers can easily find the vetted materials, and continue to find new ways to scale up the site to populate high-quality materials for all grades and subjects.

#### **Finding 4: The platform is being used for new purposes.**

The CaET repository of instructional materials was initially designed for Career and Technical Education (CTE) Teachers. The platform has been in use for over a decade. CTE teachers who have attended the Lesson Design Institutes said they attended because they have a vested interest in its continuation. Now the site will support teachers in other grades and subjects.

KCSOS is working with its technical contractor, One Learning Community (OLC), to refine the site for its current needs. In addition to site maintenance, OLC tracks who uses the site, the resources users access, and the lessons they download. WestEd will work with OLC to consider other tracking measures to help monitor the site's use.

CaET's legacy materials present a few challenges to KCSOS's development of an HQOIM. One challenge for KCSOS is attracting new users to the CaET repository with limited vetted resources for some grades and subjects. One teacher expressed concern about the site's long-term use "I think...that [limited lessons on the platform] could be a turnoff for teachers who don't see their subject area or grade level...."

Another challenge for KCSOS is the misalignment of legacy material tagging. Some resources are over-tagged or incorrectly tagged for content and grade levels they do not cover. In addition, the tagging/search function is limited in ways that complicate accessing materials.

Finally, with new users, uses, and functionality goals, KCSOS will need to determine if teachers like using the site, can easily find what they need, know how to navigate to different parts of the site, and can provide feedback on their experience to improve the site.

**Implication:** For the CaET repository to be useful to all teachers in California, KCSOS needs to add more vetted materials across grades and subjects. It needs to find a solution to identify and correct improperly tagged information and improve the searchability of materials. Finally, KCSOS should conduct end-user testing to understand the user experience with the site.

### **Finding 5: Other support could help KCSOS.**

The KCSOS team highlighted that this year they learned the importance of spending more time on norming processes and communication at the start of a project to hone their understanding of goals and project scope.

As the work continues, the KCSOS team plans to focus more on the big picture and understanding CCEE and CDE's long-term goals for the work. They also aspire to strategically invite more players to conversations and participants to help support efforts, such as folding external initiatives into the lesson plan institutes in ways that leverage KCSOS efforts.

The KCSOS team is considering strategies to scale the lesson plan institutes and increase attention on the CaET platform. There have already been conversations with the CCEE and CDE around establishing a regular cadence for project updates and input to foster support and cohesion. Alongside plans for a marketing campaign, the KCSOS team is looking to the CDE and educational partners to help drive resources and traffic to the website.

**Implication:** KCSOS should work with CDE and CCEE to craft a compelling vision for the CaET site, the core strategies to achieve that vision, and a sustainability plan to guide the work beyond the contract period. CDE and CCEE staff could facilitate the HQOIM initiative with additional engagement with the KCSOS team. KCSOS can increase efforts to involve CDE content areas in the HQOIM development and implementation.

## **Recommendations:**

### **For CCEE:**

- Invite Open Educational Resource (OER) repository leaders from other states to meet with the HQOIM and CDE leadership to facilitate peer learning on developing High-Quality Online Instructional Materials repositories.
- Convene CDE leadership and the HQOIM team to review the vision for this project, the core strategies needed, the governance structure of the project, and sustainability beyond the current contracts.
- Identify partners and contractors in the statewide systems of support to assist KCSOS in developing and vetting instructional materials.
- Distribute materials to California County Superintendents to build support for the HQOIM and to identify existing OER materials for inclusion in the repository.

### **For CDE:**

- Review the project's governance and see if other CDE staff and leaders should be more directly involved.
- Provide a clear vision for the CaET platform with short, medium, and long-term measurable goals.
- Consider requiring newly contracted parties developing supplemental curricular materials to use the lesson plan rubric in their developmental work and contribute their materials to the CaET repository.
- Involve CDE curricular and content staff in the development and periodic review of the vetting rubrics and training materials.
- Review existing OER materials in CDE for inclusion in the repository.

### **For KCSOS**

- Work with WestEd, CCEE, and CDE to revise the project logic model.
- Develop guidance for partner support to help potential partners understand the process of vetting and developing instructional materials.
- Engage teacher groups to maintain a focus on High-Quality and to ensure the usefulness and ease of use of the CaET site.
- Explore options to support teachers in making connections between supplemental lessons and their core curriculum.
- Develop or contract end-user testing of CaET, including user task analysis, user interface testing, navigation testing, and usability testing.
- Develop a system for regularly monitoring data about site use (including defining what constitutes use) and by whom.