

CCEE Statewide Evaluation Coherence and Communication Year 1 Report

Prepared for

California Collaborative for Educational Excellence

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Highlights

- ▶ California Collaborative for Educational Excellence (CCEE) contracted RTI International to facilitate coherence and communication across external evaluations of three statewide professional learning projects.¹
- ▶ The external evaluations are led by WestEd (High-Quality Online Instructional Materials Initiative); Education Northwest (Learning Acceleration System Grant Program); and American Institutes for Research (Reading Instruction and Intervention Grant Program).
- ▶ The designs of the professional learning initiatives themselves are varied—respectively, they involve resources and training related to high-quality, open-access instructional materials; capacity-building to accelerate learning in math, literacy, and language development; and literacy-based professional learning to enhance reading instruction. Evaluation approaches are distinct, given differences in the design, aims, scope, and contexts of each project. Therefore, there are commonalities that can be defined across evaluations but each evaluation must also include contextual and differentiated program considerations.
- ▶ *Coherence* refers to coordinated efforts with a focused direction across evaluations (e.g., opportunities to use common language and metrics). *Communication*, in this project, is how evaluation descriptions and findings are disseminated to multiple audiences with understandable information. *Equity integration* is central to this project and relates to the unique contexts in which projects are being implemented; historical inequities in those contexts; participants' assets and needs; and shared decision-making.
- ▶ Determining coherence includes looking for commonalities in how evaluations explore questions about the features and quality/relevance/usability of the professional learning, as well as impacts of the initiatives. This framework is informed by literature on design principles of high-quality professional learning and approaches to evaluating professional development both locally and systemwide at state and regional levels.
- ▶ In Year 1 (August 2023–June 2024), RTI convened evaluation teams and engaged in a continuous improvement process that produced materials aimed at facilitating evaluation coherence and consistent communication about statewide professional learning initiatives. Activities included gathering and organizing evaluation questions within specific question categories, synthesizing common protocol questions, drafting an evaluation logic model, and preparing for impact evaluation coherence.
- ▶ The fruits of this collaborative process are shared in this report, along with recommendations and next steps for evaluation coherence and communication.

¹ See project and evaluation descriptions in *California Statewide Evaluation Coherence and Communication: Introduction to the Project* (Wisniewski, Denson, & Pierce, 2023). Some text in the Highlights, Introduction, and Year 1 Project Aims sections here is reproduced from that report.

Introduction

California Collaborative for Educational Excellence (CCEE) funded three new professional learning evaluations in 2022–2023: the High-Quality Online Instructional Materials Initiative Evaluation, led by WestEd; the Learning Acceleration System Grant Program Evaluation, led by Education Northwest; and the Reading Instruction and Intervention Grant Program Evaluation, led by the American Institutes for Research (AIR). CCEE requested that RTI International facilitate coherence and communication across external evaluations of three statewide professional learning projects.

The professional learning initiatives' ultimate aims are to support students' success in school, each initiative with a different approach. The High-Quality Online Instructional Materials Initiative focuses on developing a repository of curated, high-quality, open-access instructional materials, including lessons created by educators. Learning Acceleration System Grants have been awarded to three county offices of education and involve professional learning resources and capacity-building for educators accelerating learning in mathematics, literacy, and language development. The Reading Instruction and Intervention Grant Program (Project ARISE) provides literacy-based professional learning to K-12 teachers to enhance reading instruction.

RTI's evaluation coherence and communication project is informed by both RTI's experience with evaluations of California Statewide System of Support programs

(Community Engagement, Geographic Leads, Special Education Resource Leads, 21st Century California School Leadership Academies) and the need for cross-team integration. Coherence across evaluations can facilitate greater efficiency (e.g., of data collection) and deeper understandings of change in complex systems (Bugler, 2022).

For this project, a working definition of coherence is how evaluations work in a coordinated manner with a focused direction (Darling-Hammond, 2010; Fullan & Quinn, 2015). The tasks for coordination and a focused direction involve the identification of common language and metrics across evaluations. Communication, in this project, is how evaluation descriptions and findings are disseminated to multiple audiences, with an intent for coordinated and understandable information. All professional learning projects and evaluations are different, with varied strategies aimed at improving student outcomes. Equity integration is central to the work of this project, including considerations around the unique contexts in which projects are being implemented; historical inequities in those contexts; participants' assets and needs; and shared decision-making.

This CCEE Statewide Evaluation Coherence and Communication report describes the process and results of the collaboration among evaluators and RTI and CCEE staff ("the team") during the first year of the project (August 2023–June 2024).

Year 1 Project Aims

Evaluations of professional learning have common elements, and when the evaluations are in a similar state context, these elements can be linked with metrics that have a common language. The common language will help meet goals, which generally are to identify the effective features of the professional learning and the impact that professional learning has on participants, organizations (districts, schools), and individuals (teachers, students) affected by the participants' learning. The three professional learning evaluation teams had an opportunity to gather and report on data about features and impact in ways that align to research with common messaging.

Building on learnings from the start-up period, RTI collaborated with CCEE to determine short-term activities to facilitate evaluation coherence and communication in Year 1, which began in August 2023. These activities included the following:

- conducting a complete review of evaluation questions and organizing them into categories (e.g., professional learning features, quality and satisfaction,² and impact);
- gathering protocol questions from each evaluation team (e.g., protocol questions related to professional learning features and quality and relevance);
- analyzing and organizing protocol questions;
- collaborating around potential protocol questions with adaptations and options;

- reviewing and revising protocol questions related to features before starting outcome questions;
- reviewing logic models to develop a draft coherence logic model with common language to build from for moving to evaluation outcomes; and
- drafting ways that evaluators could organize impact, including sample impact-related questions.

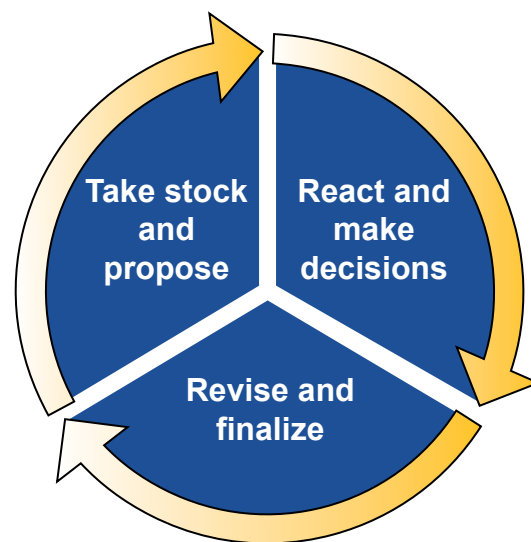
Team members engaged in a continuous improvement process throughout the project (described in the following section), which led to revisions of proposed materials. Revisions included the refinement of evaluation question categories and category descriptions and improvements to the draft logic model for evaluation coherence. As evaluation question categories and category descriptions were revised, evaluation teams provided additional protocol questions aligned to those categories, adding outputs and usability, with final categories as *outputs* and *quality/relevance/usability*.

² For the purposes of this report, we updated the term “satisfaction” to “relevance” to be more precise about the focus of the data evaluators would collect.

Continuous Improvement Cycle for the Creation of Coherence and Communication Resources

RTI facilitated a continuous improvement process throughout Year 1 to develop and refine coherence and communication materials that reflected the expertise and focus of each evaluation team. Cycles of improvement involved the steps depicted in Figure 1 and described below.

Figure 1. Continuous Improvement Cycle for the Creation of Coherence and Communication Resources



- 1. Take stock and propose.** RTI started each continuous improvement cycle by gathering, analyzing, and organizing materials. Depending on the focus of the cycle, the source materials could include evaluation questions, protocol questions, or literature and exemplars related to evaluations of educational initiatives.
- 2. React and make decisions.** RTI drafted resources to propose to the team: evaluation question categories and descriptions, sample high-level evaluation and protocol questions, categorized protocol questions from evaluators, and a draft logic model.
- 3. Revise and finalize.** RTI gathered evaluators in online meetings and collected feedback from them on the proposed resources. Evaluators offered expert input that drew on their histories in evaluation and knowledge and experiences of the statewide professional learning projects they are currently evaluating.

RTI drew on team input to create the updated versions of evaluation coherence and communication resources that we present in the next section.

Results

In this section, we present the resources created through continuous improvement cycles with the team over the course of Year 1. Resources include the following:

1. A draft logic model for statewide coherence featuring common language across evaluations
2. Categories of evaluation questions and their descriptions
3. High-level evaluation and protocol questions
4. Equity integration
5. Impact considerations

1. Logic Model for Statewide Evaluation Coherence

The draft logic model for statewide evaluation coherence draws on literature and exemplars related to evaluation logic models; knowledge and experiences of RTI staff from evaluations of other statewide professional learning initiatives; and input and information from team members across evaluations in this project.

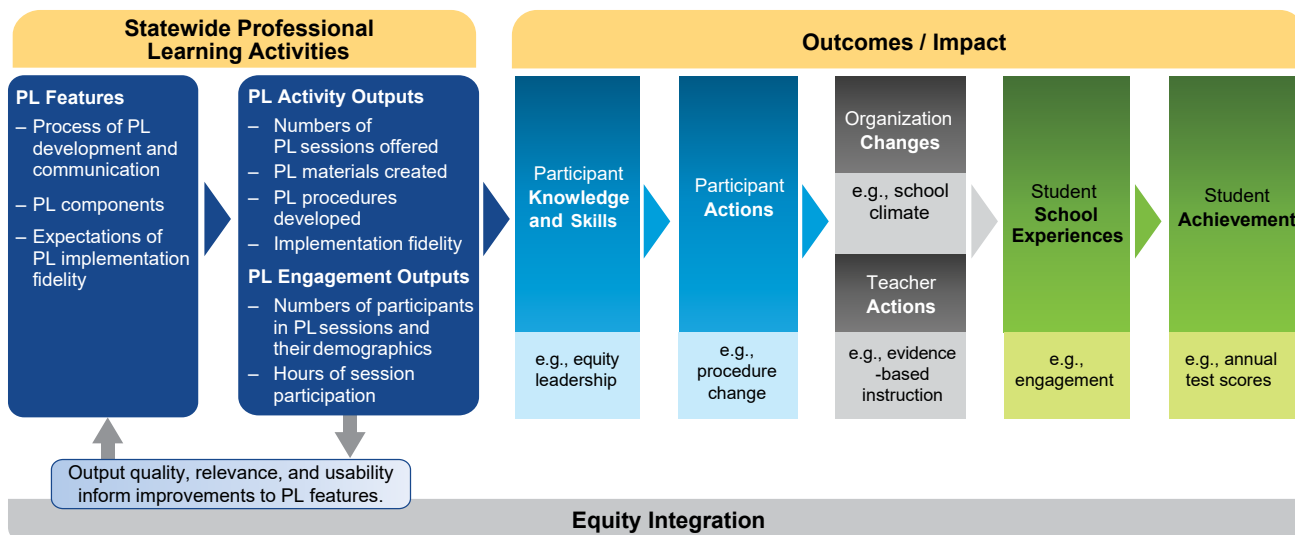
The lefthand side of the logic model depicts statewide professional learning activities examined in process evaluations, both features of professional learning projects (professional learning components and the processes used to develop them) and outputs (participation and engagement in the professional learning and the extent

to which the professional learning was implemented with fidelity).

The righthand side of the logic model depicts different levels of outcomes examined in outcome evaluations of professional learning initiatives. These levels include outcomes related to participants’ knowledge and skills, their actions, changes in schools/school systems and teacher actions, and students’ experiences and achievement in school. The logic model features language that could be used across evaluations to communicate the general areas that evaluators examine and where they look for outcomes, with improved outcomes for students being a key unifying endpoint that each professional learning project is designed to reach. This is true even though professional learning activities, the types of participants engaging in the professional learning and their unique contexts, and examples of intermediary outcomes will vary from evaluation to evaluation.

During Year 1, the team focused on coherence across process evaluations, and the light blue box lists areas of focus in these evaluations, including participants’ perspectives on the quality, relevance, and usability of the professional learning outputs. The arrows depict a process of continuous improvement in which process evaluation findings can inform features of the professional learning (shortened to “PL” in tables and figures), development processes, and expectations for implementation fidelity.

Figure 2. Statewide Evaluation Coherence Logic Model



2. Categories of Evaluation Questions and their Descriptions

Table 1 displays characteristics of evaluation questions in the following four categories:

- Professional Learning Features;
- Professional Learning Outputs;
- Professional Learning Quality/Relevance/Usability; and
- Professional Learning Impact.

To develop these categories, we drew on resources related to studying the implementation and impact of educational initiatives (Hill et al, 2023; U.S. Department of Education, 2021; U.S. Department of Education, n.d.). Evaluators’ questions and input and RTI’s past work in evaluations of professional learning also informed our development of the categories.

Table 1. Categories of Evaluation Questions and Evaluation Question Category Descriptions

PL Features	PL Outputs	PL Quality/Relevance/Usability	PL Impact
Evaluation Question Category Description			
<p>The PL Features category of evaluation questions addresses components of the PL that are effective and aligned to the research base within associated fields (PL, systems change, leadership) and state policy; lays the foundation for understanding what components of the program are associated with impact; and captures the processes by which the PL is developed, communicated, and implemented when needed.</p>	<p>The PL Outputs category of evaluation questions addresses outputs, including evidence of PL sessions and participation/engagement in sessions.</p>	<p>The PL Quality/Relevance/Usability category of evaluation questions addresses the components of PL (and PL development) that were successfully implemented; applicable to participants; aligned with leaders’ and others’ needs; and usable. It includes information about the extent to which educators felt prepared to implement learnings from the PL and provides descriptions of quality and information for program improvement.</p>	<p>The PL Impact category of evaluation questions addresses (a) increases in adult knowledge, (b) change in their job-embedded actions that lead to improvements in site effectiveness, (c) behaviors of related staff, and (d) student success.</p>
Evaluation Questions in these Categories May Ask About...			
<ul style="list-style-type: none"> • The process of developing the PL components and outreach about the PL • Definition of the PL and its components and its specified alignment to PL research and policy (key features such as structures; formats/methods of delivery, including a focus on asynchronous PL across evaluations; content; and intended participants) • Focus on expectations of the PL (e.g., number of intended PL sessions and expectations for participation and completion) • Focus on planned implementation of the PL, like fidelity, differentiation, or variation per context 	<ul style="list-style-type: none"> • Numbers of PL sessions offered • Numbers of participants in PL sessions and their demographics • Measures of participant engagement in PL • PL materials created • PL procedures developed • PL fidelity of implementation 	<ul style="list-style-type: none"> • Exemplars, bright spots, model sites, or resources as quality PL examples • Barriers or challenges to PL design that lead to suggestions to improve quality, relevance, or usability 	<p>Changes in mindsets, self-efficacy, skills, and actions like</p> <ul style="list-style-type: none"> • increases in knowledge • actions taken by participants in their sites • changes in the participant sites based on participants’ actions (e.g., changes in the organization and changes in teachers or other staff) <p>Focus on student success, including changes in</p> <ul style="list-style-type: none"> • student access, engagement, belongingness, and behaviors • student performance scores and graduation rates

3. High-Level Evaluation and Protocol Questions

The evaluation question categories above are reflected in sample, high-level evaluation questions in Table 2 that could be included in assessments of statewide professional learning initiatives. We developed the sample high-level protocol questions below by synthesizing protocol questions from each evaluation team.

Table 2. High-Level Evaluation and Protocol Questions for Each Evaluation Question Category

PL Features	PL Outputs	PL Quality/Relevance/Usability	PL Impact
High-Level Evaluation Questions for Each Category			
<ul style="list-style-type: none"> • How was the PL developed? • What are the features of the PL? • What are the expectations for PL implementation? 	<ul style="list-style-type: none"> • What PL activities does the provider produce? • Who participates in the PL? • To what extent are participants engaged in the PL? • To what extent was the PL implemented with fidelity? 	<ul style="list-style-type: none"> • What is the quality of the PL? • To what extent is the PL relevant for participants? • To what extent did participants find the PL usable? 	<ul style="list-style-type: none"> • What is the impact of the PL? • To what extent do adults change their job-embedded actions based on what they learned in the PL? • How do changes in adults' job-embedded actions impact students?
High-Level Protocol Questions for Each Category			
<ul style="list-style-type: none"> • What process did you take to develop the PL? Who was involved? • What outreach has been conducted about the PL? How has information about the PL been communicated to potential participants? • What are the critical components of the PL? What are the key features such as structures, formats/methods of delivery, and content? • What do you consider to be the most important aspects of the PL? 	<ul style="list-style-type: none"> • What PL activities have been offered? How many PL sessions? • How many people participated in the PL? What were the demographic characteristics of participants? • What PL materials have been created? • What PL procedures have been developed? • To what extent was [insert aspect previously identified] of the PL implemented? • Which of the following PL features were present (or to what extent) in the sessions? 	<ul style="list-style-type: none"> • To what extent did the PL meet your needs as a participant? • What worked well about the PL? • Were you able to use what you learned in the PL at your site? • What challenges did you encounter with the PL's design? What changes might be needed to better address your needs? • What model sites, bright spots, or resources can serve as exemplars? 	<ul style="list-style-type: none"> • How did the PL affect participants' mindsets, self-efficacy, and/or skills? • What changes did you make at your site as a result of the PL? • What changes did students experience (e.g., in access, engagement, belongingness, behaviors, and/or performance)?

4. Equity Integration

Equity integration encourages evaluation teams to address disparities, institutional and structural barriers, and opportunities to incorporate the perspectives and expertise of people most affected by the programs being implemented (Hood, Hopson, & Kirkhart, 2015). Evaluation questions may be related to the extent to which professional learning features include participants as decision-makers and co-owners and respond to local contexts, mindsets, and needs, as well as how evaluators account for historical and current inequities (e.g., Equitable Evaluation Framework and Equitable Evaluation Initiative, 2023).

Below we describe three subcategories of questions evaluators might ask to determine the extent to which projects (1) involve participants as decision-makers/owners, (2) recognize local and cultural context and provision of tailored supports, and (3) account for historical and current inequities.

Participants as decision-makers/owners. Questions in this subcategory aim to help evaluators understand the extent to which participants are included as expert decision-makers in professional learning development and implementation processes. These questions help evaluators gauge the extent to which participants' assets are incorporated into the professional learning and participants' feedback is solicited and incorporated into the professional learning. Questions include the following:

Shared decision-making about professional learning development and implementation

- How have professional learning providers shared power and decision-making regarding the development and implementation of professional learning with participants, particularly those minoritized in educational and professional settings? Development and implementation may include the structures and processes of the professional learning; the expectations and needs of participants inform the structures, processes, and content.
- How have professional learning providers co-created with participants the metrics for participant change?

Professional learning environment and feedback

- How have professional learning providers built an environment of trust with participants that allows them to provide honest and meaningful recommendations and feedback?
- To what extent does participant feedback shape revisions to professional learning design and implementation?

Local and cultural context and provision of tailored supports. Questions in this subcategory address school, district, and other contexts surrounding participants and how they influence participation, implementation, or usability and impact of professional learning content in the school or district. Contextual factors are typically out of the program developer's control but may influence professional learning design and activities, including tailored supports provided to participants. Contextual factors may include geographic (e.g., rural) and student demographic characteristics; community, economic, historical, legal, political, and sociocultural characteristics; facilitators to participant implementation of professional learning content in the participant's context (e.g., policy to support the topic or structures to support practice changes); or barriers to implementation of professional learning content or usability in the participant's context (e.g., limited support from superiors, competing initiatives). Sample questions include the following:

Connection between professional learning and participants' assets

- How are professional learning participants' strengths or assets (including cultural ways of knowing, relational power, and lived experiences) leveraged as part of professional learning content for knowledge and skill development?

Assessment of barriers to participant usability

- What are local and cultural barriers to accessing professional learning? How have providers considered barriers to participant use of new or adjusted practices in their setting? How have professional learning providers considered these barriers in the development and implementation of the professional learning?

Assessment of supports for participant usability

- What supports are in place in participants' contexts to facilitate use of new or adjusted practices in their settings? To what extent did the professional learning provide tailored, differentiated support that would result in change according to participants' needs, change-making power, relational power, and salient environmental contexts? In what ways can professional learning providers support participants to act as change agents in their settings?

Historical and current inequities. Questions in this subcategory aim to deepen an understanding of local and cultural context by investigating historical (and current) inequities that may affect participant access to professional learning and professional learning implementation and outcomes. Evaluators may examine systemic barriers to equitable educational opportunities and root causes of inequities through questions in this category. Sample questions include the following:

Inequities in access to professional learning and influence on professional learning content and expected outcomes

- How have historical and current inequities shaped participants' access to high-quality professional learning? How have inequities shaped the level of support participants will receive? Do the professional learning topics and expected practice changes perpetuate or disrupt historical and current inequities?

Influence of inequities on participant thinking and use of this information to shape professional learning

- How have historical and current inequities contributed to participants' mindsets about their students, professional peers, and educational systems (among others)? How have those inequities shaped participants' levels of self-efficacy and skill attainment? Does the professional learning provide skill development that considers the context of historical and current systemic barriers? Does it provide mitigation strategies given those barriers?

5. Impact Considerations

The team's focus during Year 1 was on process evaluations and commonalities in evaluation and protocol questions in these evaluations. But to prepare for a focus on impact, we described the impact categories and high-level questions (see Sections 2 and 3). Then, in our final team meeting, we discussed impact definitions and goals. We defined impact evaluation as having two overarching categories: reported/descriptive and statistical. The reported/descriptive category includes impacts that professional learning providers and participants perceive as occurring, conveyed in interviews, focus groups, or surveys. Statistical impact means impact derived from a quasi-experimental design that uses a comparison group and collects quantitative data.

The team discussed the challenges of impact data collection within both categories. For reported/descriptive impact, a challenge is that provider or participant perspectives may not link directly to student achievement. However, reported/descriptive impact provides information about how knowledge and participant actions may influence changes in the organization that lead to student experiences and achievement. There are many challenges associated with determining statistical impact. For example, statewide professional learning occurs far from students, meaning that many participants train others who work directly with students or focus on actions within districts or schools, also not directly working with students. Second, setting up a comparison group means that data are collected from nonparticipants, those who may not be willing or have the capacity to provide data, and the analysis of student administrative data does not take into account how many adults were influenced by the professional learning or the other initiatives in schools and districts. Sample sizes are also at the heart of a quasi-experimental design, and a large sample size may not be available or may require money and time outside the scope of the evaluation.

The team reviewed each level of impact in the evaluation coherence logic model and what evaluators might expect to glean from asking questions about the impact level. Team members shared examples of evidence aligned to each outcome level and perspectives about challenges and limitations of data collection and data sources at each level. Table 3 below lists descriptions of impact levels, examples of evidence, and notes from the team's impact meeting.

Table 3. Descriptions of Impact Levels and Samples of Evidence for Each Level

Impact Level	Participant Knowledge and Skills	Participant Actions	Organization Changes	Teacher Actions	Student School Experiences	Student Achievement
Description	Knowledge and skills that participants gain from the PL offering	Behaviors or actions that participants take in their organization based on their participation in PL	Changes in the district or school that occur based on the actions that participants take	Actions that teachers take as a result of (1) their own PL participation, (2) PL participation of other staff (e.g., leader), or (3) organization changes based on other staff participation	Experiences students have as a result of (1) changes in the organization or (2) actions teachers take as a result of their own or other staff’s participation in PL (examples may include belongingness, engagement, and learning)	Impact on student achievement demonstrated through quasi-experimental design studies
Samples of Evidence	Participant skills in lesson design institutes Teachers’ confidence to implement	Participant conducts PL with a team in their school	Implementation of district literacy plan; universal screeners; lesson studies; lesson development processes Institutionalized evidence-based PD/practices Sustainable structures at district levels to carry on practices	Teachers using more practices from training modules Collaboration and sharing among teachers Teachers developing and implementing high-quality lessons	Perceptions of impact on students of changes in teacher practice/ teachers’ use of materials Academic and behavioral student outcomes	Achievement scores: 3rd grade reading proficiency scores as baseline compared to a year later Academic and behavioral student outcomes
Notes from Impact Meeting	Some participants are LEA leaders; others are teachers. Not everyone implementing has a classroom. Knowledge and skills often reported by participants (not assessed through independent measures)	Actions often reported by participants (not assessed through independent measures)	Changes often reported by participants (not assessed through independent measures)	Actions often reported by participants (not assessed through independent measures)		Currently monitoring scores, laying groundwork for QED. Not making causal links between project and student achievement.

Conclusions, Recommendations, and Next Steps

During Year 1 of the CCEE Statewide Evaluation Coherence and Communication project, the team built an understanding of alignments (and nuances) among the three evaluations of statewide professional learning initiatives. Team input led to improvements of the coherence resources drafted. For example, team discussions led to

- addition of *expectations* for fidelity of implementation of professional learning, in the professional learning Features evaluation question category (see Table 1);
- addition of the outputs evaluation question category, which includes participant engagement in professional learning (see Table 1);
- addition of professional learning *usability* to the evaluation question category of Quality/Relevance (see Table 1);
- inclusion of contextual factors that facilitate or hinder professional learning implementation or impact as part of equity integration; and
- clearer depiction in the logic model of how process evaluation data related to outputs and quality/relevance/usability can lead to improvements in professional learning.

RTI recommends several next steps based on the first year of the project. One recommendation is to continue convening the team so that it can delve more deeply into each outcome level described in the logic model and Table 3. Team members can collaborate around how to measure perceived impacts of professional development on participants' behaviors, knowledge, and skills; changes in district-level policies and practices; and perceptions and other evidence of student-level impacts. It is critical that evaluators not only measure how professional learning initiatives impact different levels of educational systems (and ultimately students), but also work toward shared understandings of each level and coherence in reporting across each level. This work would facilitate clear and consistent communication about outcomes to audiences across the state. For example, teams could align on concrete examples and talking points that could be used across evaluations and the larger education system.

The team also recommends that the materials created in Year 1 of this project could serve as guidance for evaluators of educational initiatives and for state-level decision-makers. Internal and external evaluators could look at materials, including the logic model, question categories/examples, equity integration, and impact considerations, to help determine and clarify distinct roles for each evaluation team. State-level decision-makers could use these same resources to help create coherence across evaluations of professional learning initiatives and potentially the initiatives themselves, educational data, and even educational policies to facilitate equitable outcomes for students.

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