External Evaluation of the Special Education Resource Leads Within the California Statewide System of Support

Year 2 (2024–2025)

September 2025

Prepared by

Robin Wisniewski, Project Director, Special Education Resource Lead Evaluation

Jill Pierce, Associate Project Director

Jon Boyette, Research Specialist

Taylor Campbell, Research Specialist

California Statewide System of Support Evaluation Team:

Jay Feldman (Statewide System of Support Evaluation Project Director)

Susan Rotermund

Nitya Venkateswaran

Robin Wisniewski

RTI International
300 Frank H. Ogawa Plaza, Suite 280, Oakland, CA 94612

www.rti.org

RTI International is a trade name of Research Triangle Institute.
RTI and the RTI logo are U.S. registered trademarks of Research Triangle Institute.

Contents

Introduction to the SERLs 1

SERL Goals and Activities 3

SERL External Evaluation Design 5

- Qualitative Data Collection and Analysis 6
- Quantitative Data Collection and Analysis 6
- Survey Respondent Overview 7

Findings 9

- Connections 10
  - SERLs' Perspectives on Connections 10
  - Participants' Perspectives on Connections 11
- Capacity Building 12
  - Capacity Building Features Influencing Impact 12
  - SERLs' Perspectives on Capacity Building 12
- Impact 16
  - SERLs' Perspectives on Impact 16
  - Participants' Perspectives on Impact 18

Recommendations 20

- For SERLs 20
- For State Agencies and RTI 21

Appendix A 23

Introduction to the SERLs

As part of the 2022 Budget Act, the California Legislature authorized the California Department of Education (CDE), in collaboration with the California Collaborative for Educational Excellence (CCEE), to select Special Education Resource Leads (SERLs) from across the state. To be considered, applicants must be a county office of education (COE), special education local plan area (SELPA), or an appropriate partnership or consortia of COEs and/or SELPAs; and they must demonstrate how they will build capacity in regional and local entities throughout the state to improve outcomes for students with disabilities.

The legislative charge in California Education Code Section 52073 is to select no more than 10 SERLs. The requirement directs the selection as:

- At least 3 leads must provide support to COEs and local education agencies (LEAs) in building capacity to increase student achievement
- One lead must be selected to support the implementation of Individualized Education Plans (IEPs)
- One lead must be selected, in partnership with a family support organization, to provide support to students and families in alternative dispute resolution (ADR).

The other resource leads were selected as a result of a statewide needs assessment

- One Universal Design for Learning (UDL) lead was selected to support LEA teams to implement, support, and develop evidence-based practices to increase outcomes for students with disabilities.
- One English Learner (EL) lead was selected to provide evidence-based best practices, resources, and training to LEAs for students with disabilities who are also ELs.

There are seven selected Leads awarded SERL grants for the 2023–2028 cycle. The Lead focus areas are listed in **Exhibit 1**.

Exhibit 1. SERLs' focus areas and associated grantee, SELPA program office, and partners

SERL	Capacity-Building Focus Area	Grantees and Partners
California Collaborative for Impactful Pathways (CCIP)	Tracking and strengthening post-secondary outcomes for students with disabilities	Santa Clara COE
EmbraceAbilities	Inclusive practices for students with extensive support needs	Los Angeles COE; Partner: Special Needs Network
High-Quality IEPs (HQ IEP)	Design and development of high-quality IEPs in collaboration with students and families	San Diego COE (East County SELPA); Partners: East County SELPA and Santa Clara SELPA
Improving Outcomes for Multilingual Students with Exceptional Needs (MuSE)	Resources to strengthen supports for multilingual students with exceptional needs ("dually identified" students)	Imperial COE (Imperial County SELPA)
Open Access and Universal Design for Learning (UDL)	Practices aligned with the UDL framework to support learners' engagement, communication, and participation	Placer COE (Placer County SELPA); Partners: Antelope Valley SELPA, Humboldt COE, and North Inland SELPA
Pathways to Partnership (P2P)	Alternative Dispute Resolution (ADR): prevention and resolution of conflict (e.g., IEP-related disputes) with a student-centered focus	Ventura COE (Ventura County SELPA); Partners: Tehama County Schools, Rainbow Connection Family Empowerment Center (Community Partner), Tehama County SELPA, and Ventura County SELPA
System Improvement Lead (SIL)	Data-informed continuous improvement to enhance outcomes for students with disabilities	El Dorado COE (El Dorado County SELPA); Riverside County SELPA

During Year 2, CCIP's name transitioned from California Collaborative for *Inclusive Practices* to California Collaborative for *Impactful Pathways*, reflecting a change in focus to building capacity around tracking and strengthening students' post-school outcomes.

This report is the second interim external evaluation report of the SERLs, which have received grants to operate for 5 years (2023–2028). The report describes RTI's technical assistance provided to the Leads on their goals and logic models, the design of the external evaluation and data collection approach for Year 2, results about SERLs' connections, capacity building, and impacts in Year 2, and recommendations for Years 3–5.

SERL Goals and Activities

In 2024–2025, the California Statewide System of Support developed descriptions of Universal, Targeted, and Intensive levels of support that are available to all districts, charters, COEs, and SELPAs in California. The descriptions are listed on the California SSOS website. These descriptions are shown in **Exhibit 2**, along with examples of SERL offerings at each level.

Exhibit 2. Level of support and examples of SERL offerings at each level

Level of Support	Description	Examples of SERL offerings at each level
Universal	This foundational level of no-cost support is available to all districts, charters, COEs and SELPAs in California.[1]	Toolkits and best practices shared through presentations and recorded trainings
Targeted	Targeted support is available to districts, charters, COEs, and SELPAs with an identified area of need.[2]	Curated professional learning based on site-identified needs
Intensive	Intensive support is provided to districts and charters identified as requiring an extra level of hands-on partnership, often due to persistent challenges over consecutive years.[3]	Coaching for Differentiated Assistance-eligible LEAs and COEs

In Year 2, SERLs all provided universal supports and resources but varied in the mixture of targeted and intensive supports they provided.

All SERLs developed goals to drive their activities. The 2022 Budget Act[4] set forth the responsibilities within two goal areas—making connections and building capacity:

> **Connections responsibilities** are to (a) develop, support, and participate in a robust communication network among all entities in the SSOS, including the state agencies and other leads; (b) participate in a network with other agencies serving in the SSOS and serve as a conduit in connecting LEAs to the other branches of the system; and (c) facilitate integration and partnerships across all levels of the system (SELPA, COE, LEA, individual classrooms).

[1] Level of support description from the California SSOS website. Additional description: "Universal supports include access to tools and resources, professional learning, and services provided by various technical assistance providers within the Statewide System of Support, coordinated by the CCEE and the CDE."

[2] Level of support description from the California SSOS website. Additional description: "This tier of support may be accessed via Differentiated Assistance, Targeted-level Compliance and Improvement Monitoring, and/or self-identified support needs. Targeted supports often include specialized professional learning, coaching, consultation, and/or strategic planning."

[3] Level of support description from the California SSOS website. "This tier of support may be accessed after being identified by the CDE, CCEE, and/or COE via the DTA or intensive-level Compliance and Improvement. Monitoring process. Intensive supports often involve a collaborative process with the CCEE, COEs, SELPA, the CDE, and/or Geographic Leads to determine the most effective support strategies. This tier of support may include identifying a technical assistance provider with relevant expertise to work closely with the district or charter to improve student outcomes."

[4] As shown under CDE's explanation of the purpose of the Special Education Resource Leads: https://www.cde.ca.gov/sp/se/sr/serl.asp

Capacity-building responsibilities are to (a) effectively build the capacity of LEAs to improve outcomes for students with disabilities and support their families; (b) extend equity of access to high-quality technical assistance and resources statewide; and (c) provide support to both LEAs with identified needs, including those identified by CDE as needing assistance through compliance and improvement monitoring and Differentiated Assistance, and LEAs that opt in for continuous improvement support.

In Year 1, RTI provided technical assistance to SERLs as they developed connections and capacity-building goals. Leads developed goals to **connect** with other Leads, SSOS partners, and other partners across the state in support of the focus area to support or increase positive outcomes for students with disabilities. Leads also developed goals to **build capacity** of COEs, SELPAs, and LEAs in support of the focus area to support or increase positive outcomes for these students. RTI facilitated discussions about how these goals would drive the development of logic models, which included the goals, activities, and monitoring measures to create a throughline from how the Leads' activities affect LEA improvements and facilitate measurable student impact. State agency partners also provided technical assistance to link goals and action plan development.

Year 1 connections and capacity-building goals are listed in the SERL Year 1 External Evaluation Report. The variation among the goals reflected whether SERLs were new in their implementation of supports and whether they had been offering supports prior to the inception of the SERL grant (e.g., during the SELPA Leads grant, 2019–2023).

In Year 2, RTI provided technical assistance to SERLs to update their goals and refine their logic models to reflect the updated goals and evolving activities, addressing the requirement that SERLs establish qualitative and quantitative goals to evaluate their capacity built using multiple measures.[5] RTI and state agencies supported the SERLs in aligning the logic models with their quarterly reporting templates.

As a result, over the first quarter of Year 2, SERLs engaged in a continuous improvement cycle of revised goals and metrics. SERLs developed at least three goals in Year 2 which were time-bound and named specific resources, tools, convenings, and collaborations they would develop/implement. Examples of metrics include needs assessment and survey results; website analytics; completed tools and resources; task analyses; journey and process maps; interview data; offering and attendance tracking; and meeting schedules, agendas, and notes.

By the end of Year 2, SERL goals and their related offerings reflected both the descriptions from the Budget Act and the SSOS offering levels. The findings in this report detail the connections and capacity building from Year 2. Newer SERLs increased their capacity-building activities and all SERLs reported varied connections that helped to develop their capacity-building reach.

[5] As shown under CDE's explanation of the purpose of the SERLs: https://www.cde.ca.gov/sp/se/sr/serl.asp

SERL External Evaluation Design

RTI's external evaluation of the 5 years of the SERL grant is guided by three primary questions, which address Leads' **connections** within the SSOS, their **capacity-building** activities, and the **impact** of their activities. **Exhibit 3** shows the three questions along with their sub-questions.

Exhibit 3. Evaluation questions

Primary Evaluation Questions	Evaluation Sub-questions
1. What are **connections** among SERLs, and within or external to the SSOS, and for what purpsose?	a. What are the connections among the SERLs and for what purpose? b. What are the connections within the SSOS and for what purpose? c. What are connections external to the SSOS and for what purpose?
2. What are indicators of SERL **capacity-building** scale, replication, and sustainability?	a. What is the quality* of SERL capacity building? b. What are differentiated features among SERLs? c. How are features adapted per context? d. What structures and processes are present for sustainability?
3. What is the **impact** of the SERLs on students with disabilities?	a. What actions did participants take? b. What influences did the actions have on schools and students? c. What changes or trends in indicators occurred?

* RTI conceptualizes quality as per CCEE's Quality, Relevance, Usability Rubric, which defines high quality as resources that are engaging, well-designed, easy to navigate, and have development methods grounded in research and/or evidence-based practices.

Each year, we focus on sub-questions as we build the evidence for SERL connections, capacity building, and impact. As in Year 1, the evaluation in Year 2 focuses on the three primary evaluation questions, and Year 2 also highlights adaptations SERLs made to their capacity-building supports for different participant contexts. To explore these areas in Year 2, RTI used a mixed-methods approach to collect and analyze data from focus groups and surveys.

Qualitative Data Collection and Analysis

We conducted seven focus groups, one for each of the seven SERLs, with 21 Lead staff participants. The evaluation team used a semi-structured protocol to guide focus group discussions and recorded the focus groups with permission from staff. A third party transcribed the audio. The team indexed transcribed data within a database using codes aligned to the focus group protocol and evaluation questions and then composed analytic memos for codes salient to the second year of the evaluation, identifying themes and representative excerpts within each set of data. The team also analyzed themes from responses to open-ended questions on the participant survey (described below). Open-ended response analysis identified patterns commonly cited by participants and indexed relevant excerpts that supported each theme.

Quantitative Data Collection and Analysis

Our quantitative data collection in the first 2 years of the SERL grant focused on a participant survey. The purpose of the survey was to understand participant perspectives of SERL connections, capacity building, and impact.

In Year 1, we piloted a survey for two purposes: first, to explore the best administration procedures across the seven SERLs, and second, to test how questions perform with participants across SERLs, in the context of the variation across SERLs and their offering and support types.

This pilot led to an ad-hoc committee in Year 2 to revise survey questions, develop a truncated instrument, and plan a survey administration approach. The committee finalized the revised survey and RTI collected participant lists from SERLs. Participant lists included attendees for universal and targeted offerings, excluding those participants from intensive support offerings.

SERL participant lists ranged from approximately 20 to 600 participants, depending on each SERL's definition of universal and targeted offerings.[6]

We administered the survey to 1,463 registrants in SERL offerings. Individual SERL response rates ranged from 12% to 75%, with an average response rate of 23%. Of the 336 respondents, 169 (50%) indicated a medium or high involvement with their SERL. Respondents who completed at least half the survey were counted in the findings.

1,463
SERL registrants received the survey

with **336** responding

for a response rate of
23%

[6] CDE administered a survey to participants in SERL intensive support offerings in Year 2.

Of the 50% who did not report medium or high involvement, 77 (23%) reported no involvement with a SERL and 90 (27%) reported low involvement. Respondents reporting no involvement were routed to the end of the survey. Respondents reporting low involvement answered a question asking them to describe the nature of their involvement and whether it was helpful. See **Exhibit 4** for level-of-involvement responses.

Exhibit 4. Survey respondents and their pathways through the survey

Survey Respondent Reported Level of Involvement	Number	Percentage	Pathway Through Survey
Reported no involvement with a SERL*	77	23%	Were routed to the end of the survey.
Reported low involvement with a SERL	90	27%	Were routed to a question about the nature and helpfulness of their SERL interactions.
Reported medium-high involvement with a SERL	169	50%	Considered to be survey completers if they completed at least half the survey.
Total	**336**	**100%**	–

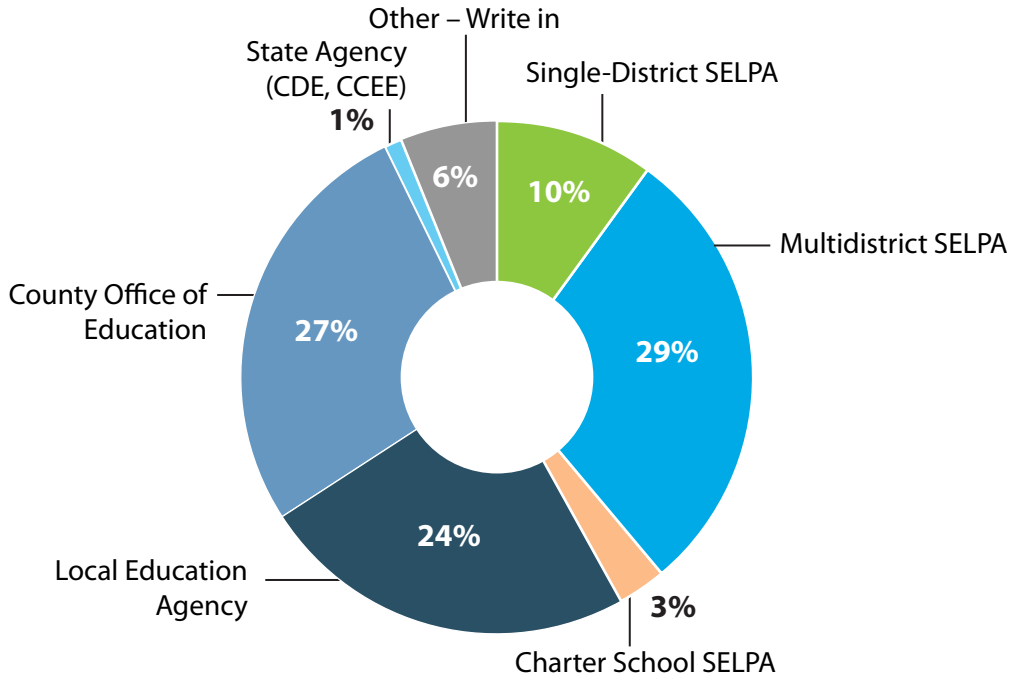
* These respondents may have had involvement with a SERL but may not have recognized or known the SERL's name.

The findings in this report describes the aggregate across survey respondents alongside highlighted examples. Recommendations for Year 3 include suggestions for defining and tracking offerings and participants to enhance the external evaluation data collection, analysis, and reporting.

Survey Respondent Overview

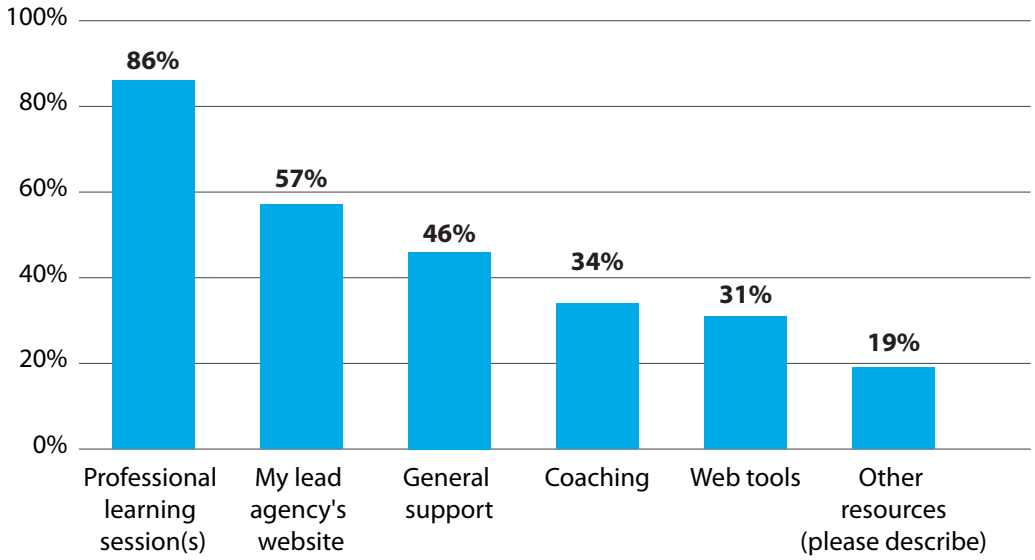
SERLs primarily provide resources and supports to leaders of SELPAs, COEs, and LEAs. However, since part of SERLs' efforts include universal resources that they present at conferences and other forums that engage wider education audiences, participants in SERL capacity-building work also include school-based educators, leaders, and special services providers as well as staff from partner organizations (including CDE), as shown in **Exhibit 5**.

Exhibit 5. **Participants' organizational affiliations**



In the survey, we presented the capacity building and supports that survey respondents might have engaged in with SERLs. **Exhibit 6** displays the results of this question, where respondents could select all options that applied. Most respondents reported engaging in professional learning sessions offered by their SERL (86%) and around half reported using their SERL's website (57%) or "general support" (46%). About a third participated in coaching offered by their SERL (34%).

Exhibit 6. **Reported capacity building and supports accessed by survey respondents**



The 90 respondents who reported a low level of involvement were routed to two questions at the end of the survey that asked what the nature of their interactions with their SERL had been and to what extent their interactions had been helpful to them in their work. Some elaborated on their involvement and helpfulness of their SERL. For example:

- "I attended the training hosted by [name of SERL] earlier in the year. It was helpful in acquainting me with various technology available for students to assist them in accessing the curriculum."
- "I attended the conference at [name of SERL]. I have attended several virtual sessions and have found the sessions in person and online to be helpful in my role. I am currently helping to roll out a new curriculum and help educate my teachers and staff regarding the alt path to diploma. The conversations and information have been invaluable."
- "Our county office collaborated with [name of SERL] and hosted the institute in January. The institute workshops were informative and beneficial towards my professional growth. And, it was such a meaningful time of networking and much needed."

Low-involvement responses most often cited they had attended trainings, workshops, and/or presentations; attended conferences; and received personalized support through mechanisms such as office hours or coaching. Other participants also shared they had only utilized resources on the website, received emails of upcoming trainings, or attended a small number of meetings.

Findings

This section is divided into three categories of findings aligned to the three primary evaluation questions:

1. What are the **connections** among Special Education Resource Leads and within the SSOS, and for what purpose?
2. What are indicators of Special Education Resource Lead **capacity-building** scale, replication, and sustainability?
3. What is the **impact** of the Special Education Resource Leads on students with disabilities?

Connections

This evaluation question investigates connections among the SERLs themselves, within the SSOS, external to the SSOS, and for what purpose.

SERLs' Perspectives on Connections

As part of the SSOS, SERLs are responsible for developing, supporting, and participating in a robust communication network among all entities in the SSOS. As in Year 1, in Year 2 SERLs continued to collaborate with one another, with initiatives across the SSOS, and with external partners.

Leads described **collaborating with other SERLs** more frequently in Year 2 than they had in Year 1. SERLs worked with one another to develop resources together (e.g., toolkits, slide decks, webinars), leveraging one another's areas of expertise. SERLs supported each other by sharing best practices related to specific groups of students with disabilities (multilingual students with exceptional needs, students with extensive support needs) and providing expertise around high-leverage practices, processes, and approaches (infusing UDL across learning environments, engaging in ADR, crafting high-quality IEPs, and improving post-school outcomes for students with IEPs). SERLs collaborated by presenting at one another's conferences, webinars, and Community of Practice (CoP) meetings, and by sharing one another's resources with their own audiences.

In addition, each SERL partnered with SIL to deepen their work on data-driven continuous improvement and approaches to measuring impact. One SERL reported working with another Lead in Year 2 on measurement systems, with the new Lead learning "really incredible things. And we just had checkpoints from there around consolidating their learning…[and focusing on] that measurement piece."

A leader from one SERL worked more closely with other SERLs in Year 2 than they had the previous year, and they noted that collaborations create larger impacts by bringing diverse expertise together:

> The connections have been wonderful…. I'm learning from them. They're learning from me. We're sharing resources, and we're finding ways where our work intersects that we can kind of elevate our grant focus and collaborate on projects. So even with the toolkit I'm working on…it gives [SERLs and CDE] kind of like this nexus where we're all collaborating.

Collaborations between SERLs and other SSOS partners included the work SERLs did with state partners (CDE and CCEE) as well as Geographic Lead Agencies, SELPAs, Educator Workforce Investment Grant initiatives, 21st Century California School Leadership Academy, the California Early Childhood Special Education Network, California Includes, Regional COE English

Learner Specialists, and Supporting Innovative Practices. On a survey administered to leaders of agencies within the SSOS, SERL leaders generally reported closer collaboration with other SERLs than with other agencies within the SSOS as a whole. After SERLs' collaboration with other SERLs, the next SSOS agencies SERLs collaborated most closely with were the Geographic Leads.

In the words of one SERL leader, working collaboratively across initiatives—including on continuous improvement—helped them to use "common language, common vocabulary, common procedures, and common methods to support our LEAs." A leader from another SERL agreed that continuous improvement-focused collaborations "are really critical to capacity building."

SERLs described **connecting with other partners in Year 2** including the CA Department of Rehabilitation, the CA Department of Developmental Services, Disability Rights Education and Defense Fund, Special Education Administrators of County Offices, Family Empowerment Centers, universities, and technical assistance centers. Through these collaborations, SERLs built local capacity and shared resources to support individuals with disabilities while also making efforts to ensure their work was community-informed and research-based.

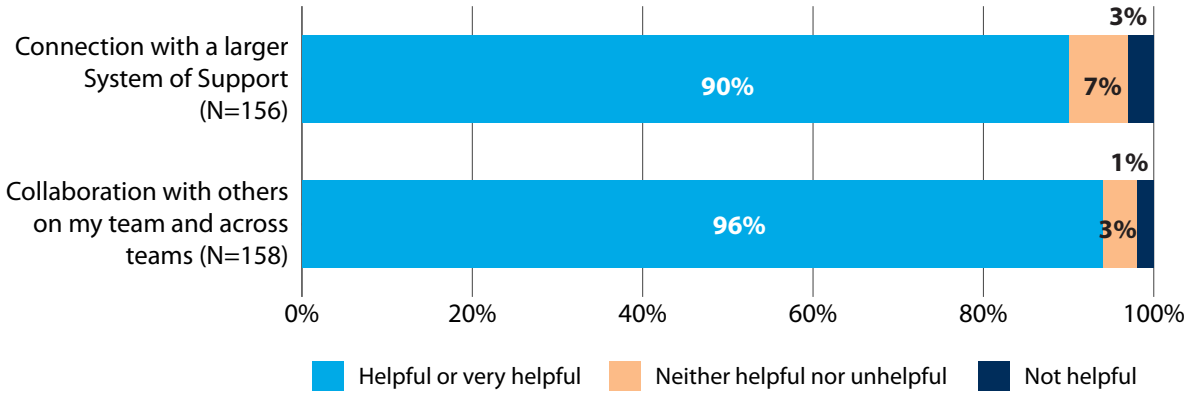
Participants' Perspectives on Connections

SERLs' responsibilities for connections involve serving as a conduit and connecting LEAs to other SSOS Leads and facilitating integration and partnerships within the system.

On the participant survey, 94% of respondents agreed that through work with their SERL, they had opportunities to collaborate with others from outside their school or district. As shown in **Exhibit 7**, 94% of respondents agreed that the opportunity for collaboration within and beyond their teams in capacity-building sessions was helpful or very helpful.

Respondents were also asked about the extent to which connecting with the larger SSOS was a helpful feature of their involvement with their SERL. More than 90% agreed that it was.

Exhibit 7. Participants' perspectives on opportunities for collaboration and connections



Capacity Building

Our evaluation question investigates capacity-building elements related to scale, replication, and sustainability. In Year 1, we identified that SERL capacity building involved best practices in professional development, and in Year 2, we found that SERLs were focused on scale and replication of their offerings, with an emphasis on adapting resources per local and statewide needs. Participants reported high-quality capacity building along with the relevance of SERL offerings to their needs.

Capacity Building Features Influencing Impact

SERL leaders were asked to reflect on a list of **professional learning features** identified from past SELPA Leads and from effective networks, professional development, and systems change work (see Appendix A). They named several of the features as having a particular influence on participant knowledge and practice in their Year 2 capacity-building work, most frequently mentioning the provision of resources and tools; opportunities for collaboration and networking; and coaching. Examples that showcase these features include:

- **Resources and tools:** HQ IEP's toolkits for educators (special education provider edition) and administrative designees, offering resources designed to facilitate collaboration and success before, during, and after the creation of the IEP, as well as CCIP's Indicator 14 toolkit on post-school outcomes for students with IEPs
- **Collaboration and networking:** P2P use of time during CoPs to have regional leads highlight impactful work they have done, so that they can serve as a model for other entities, answer questions, and bolster their own and other community members' capacity
- **Coaching:** UDL's group-based coaching, which offers opportunities for educators to share successes and barriers to implementing UDL and to learn from one another, in a format that strains SERL capacity less than 1:1 coaching, as well as EmbraceAbilities' coaching for systems leaders to support academic rigor for students with extensive support needs

Additional features that SERL leaders said influenced participant knowledge and practice in Year 2 were the positive environments and relationships that characterized their professional learning opportunities, the tailored trainings SERLs provided, and the multidisciplinary teaming their work facilitated (e.g., collaborations between special education and general education staff, and between educators and families).

SERLs' Perspectives on Capacity Building

The SERLs' capacity-building responsibilities involve equity of access to high-quality technical assistance and resources and effectively building practices within LEAs to improve outcomes for students with disabilities and support their families. SERLs also have responsibility to support LEAs with identified needs, such as through compliance and improvement monitoring, as identified by CDE.

In Year 2, SERLs offered an array of capacity-building activities, from tools and resources to presentations and in-the-field engagements (see examples in **Exhibit 8**).

Exhibit 8. Examples of SERLs' capacity-building activities in Year 2

SERL	Sample Capacity-Building Activity in Year 2
CCIP	Led presentations about reclassification and alternate pathways to a diploma; co-facilitated CoP meetings
EmbraceAbilities	Facilitated a 3-day Learning Institute for COEs and LEAs, with programs for students with extensive support needs
HQ IEP	Piloted playbook resources to support students with disabilities in self-determination through a Student-Centered Design Team CoP
MuSE	Led the professional learning series, An Equity & Systems Improvement Approach for Multilingual Students with Exceptional Needs
UDL	Supported showcase sites that feature UDL in action and will be open for observations next year
P2P	Worked with CDE's Constituent's Office and Complaint Resolution Unit to systematize the use of ADR at the state level
SIL	Facilitated teams within Networked Improvement Communities and disseminated best practices developed by teams

A focus for SERLs in Year 2 was to **replicate and scale their capacity-building efforts**, sharing tools and resources with new audiences.

A key strategy for scaling was offering **adaptable capacity-building resources**—for example, providing universal resources such as slide decks that local entities could modify to suit their specific contexts and training needs. SERLs described tracking trends in areas of concern to target capacity building accordingly and regularly collecting data that helped them to address the needs of different audiences and contexts through tailored trainings and coaching in targeted and intensive supports. SERL leaders described designing new materials or revising them based on interest and feedback from the field; shifting the format of collaboration so that more people could participate in capacity-building activities; and working with COEs and LEAs to understand their problems of practice and offer differentiated supports to drive impactful decision-making. For example, one Lead supported a COE in re-interpreting data and reframing their problem of practice as an equity issue, providing them with tailored supports aimed at helping to decrease disproportionality in special education classifications.

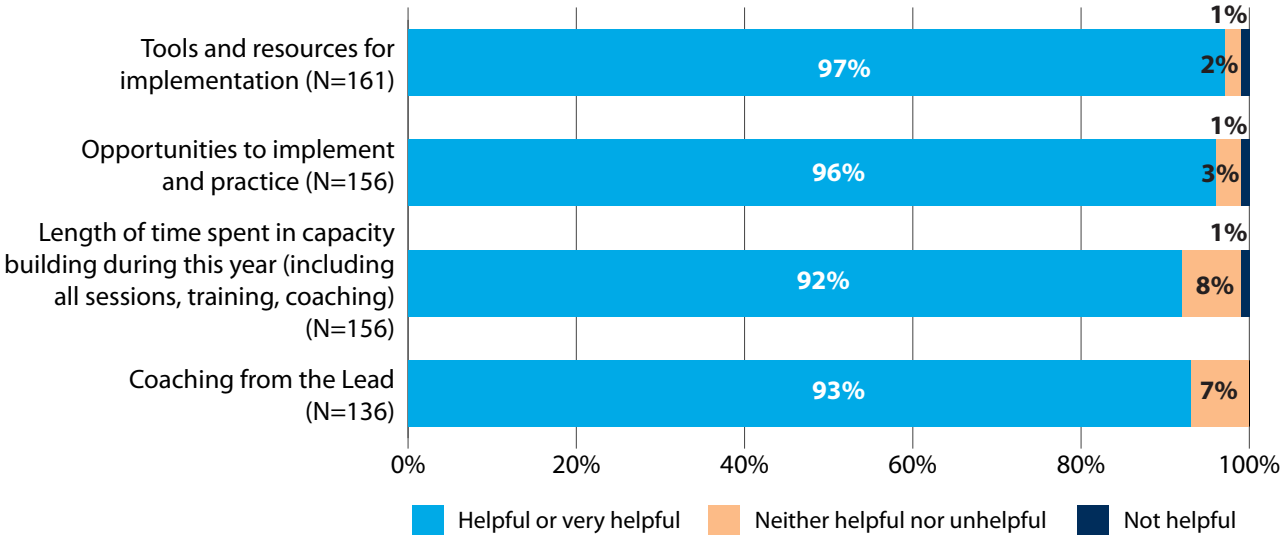
When asked how they might refine their logic models for Year 3 of their grants, SERL leaders spoke about wanting to deepen, spread, and scale capacity-building work in future years. They reported plans to enhance documentation, disseminate impactful practices, and move into more direct work with LEAs. SERLs working with regional leads spoke about plans to fine-tune their work with those leads, positioning them as one of many entities that could support **the sustainability of their capacity-building work**. Sustainability strategies

mentioned in Year 2 included leveraging networks and expertise within regions such as the Regional Implementation Leads being trained by SERLs as well as Regional COE English Learner Specialists.

In general, SERLs emphasized that training other leaders (e.g., those in COEs and SELPAs) would help high-leverage practices be implemented and sustained at the local level. Leaders spoke about train-the-trainer models being helpful to address issues of their own capacity. One leader noted that because education administrator turnover is inevitable, a sustainability strategy was advance planning to offer ongoing training down the road to sites rather than assuming staffing continuity. Finally, SERLs noted that strong connections and communication with CDE, as a statewide partner, would help to facilitate the sustainability of their work.

Survey respondents offered their assessments of how helpful the professional supports their SERL offered had been, including tools and resources for implementation, opportunities to implement and practice, length of time spent in capacity building, and coaching from the lead. As displayed in **Exhibit 9**, more than 90% of respondents found all these features to be helpful or very helpful.

Exhibit 9. Participants' perspectives on helpfulness of capacity-building supports

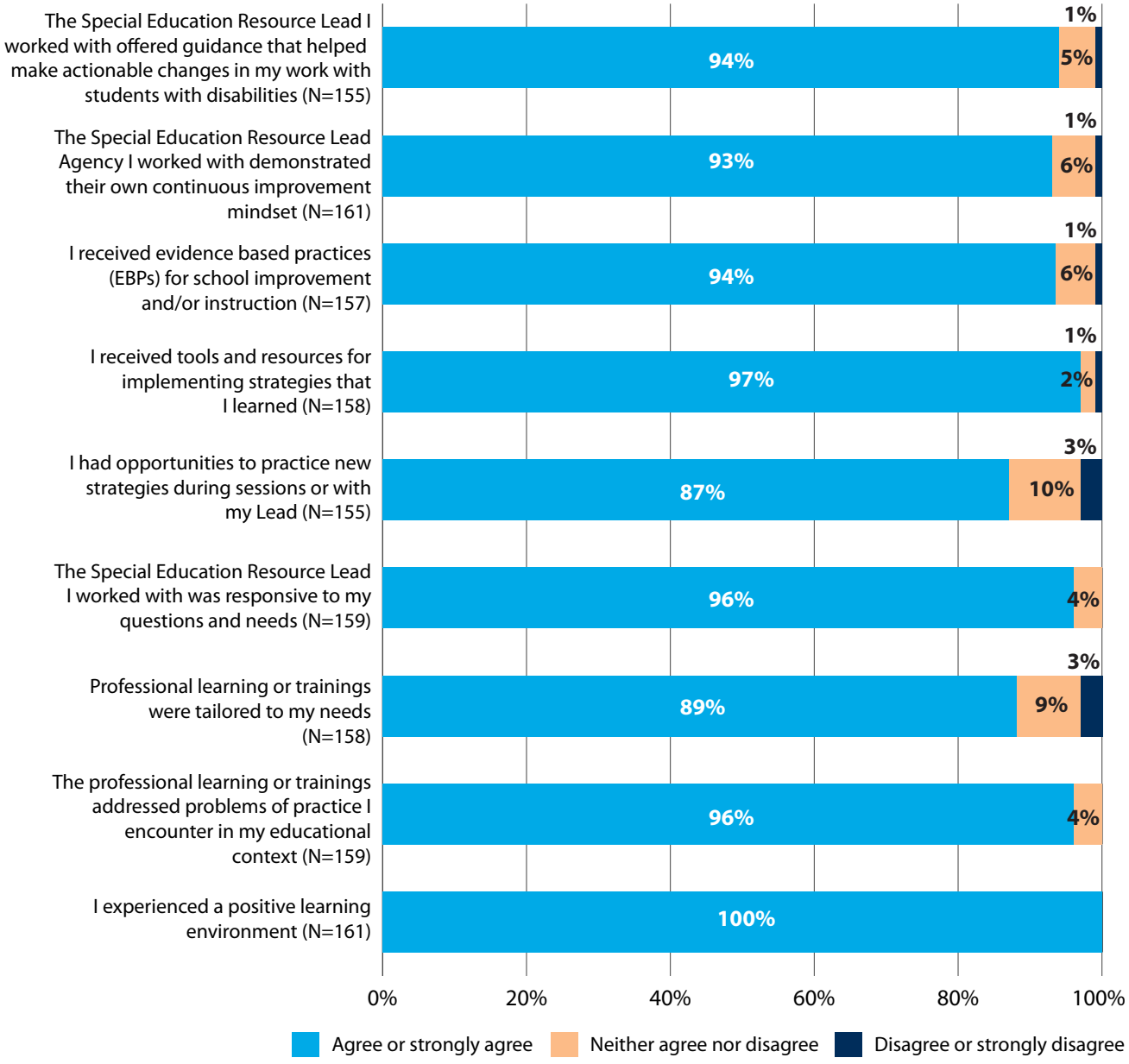


As shown in **Exhibit 10**, respondents also offered a positive assessment of the quality and relevance of the learning environment and capacity-building opportunities their SERL offered. All respondents agreed they experienced a positive learning environment. Ninety-seven percent agreed that they had received tools and resources for implementing strategies they'd learned, and 96% agreed that the professional learning addressed problems of practice they had encountered in their work and that the SERL was responsive to their leads. More than 90% agreed that their work with the SERL had provided them with tools and resources to

implement strategies they'd learned and evidence-based practices for school improvement or instruction. Respondents were slightly less likely to agree that the professional learning had been tailored to their needs (89%) or that professional learning sessions with their SERL had afforded them opportunities to practice new strategies (87%).

Commenting on the commitment and impact of the SERL, more than 90% of respondents agreed that their SERL demonstrated their own continuous improvement mindset and had provided them with guidance that helped make actionable changes in their work with students with disabilities.

Exhibit 10. Participants' assessments of the quality and relevance of capacity-building supports



Impact

The purpose of the SERLs is to increase positive outcomes for students with disabilities and support for their families. SERLs provide support to individuals and teams who primarily work with COEs, SELPAs, and LEAs at both the district and school levels.

Participants in SERL offerings who also use SERL resources provide capacity building to others (e.g., SELPA staff, LEA staff, direct service providers), while others influence policy or are direct service providers to students. Therefore, the evaluation of impact is at multiple levels: first, identifying the essential features of professional learning that lead to impact; second, the resulting participant knowledge and actions; and third, the influence that participant actions have on school contexts, direct services providers like teachers, and, ultimately, students themselves.

SERLs' Perspectives on Impact

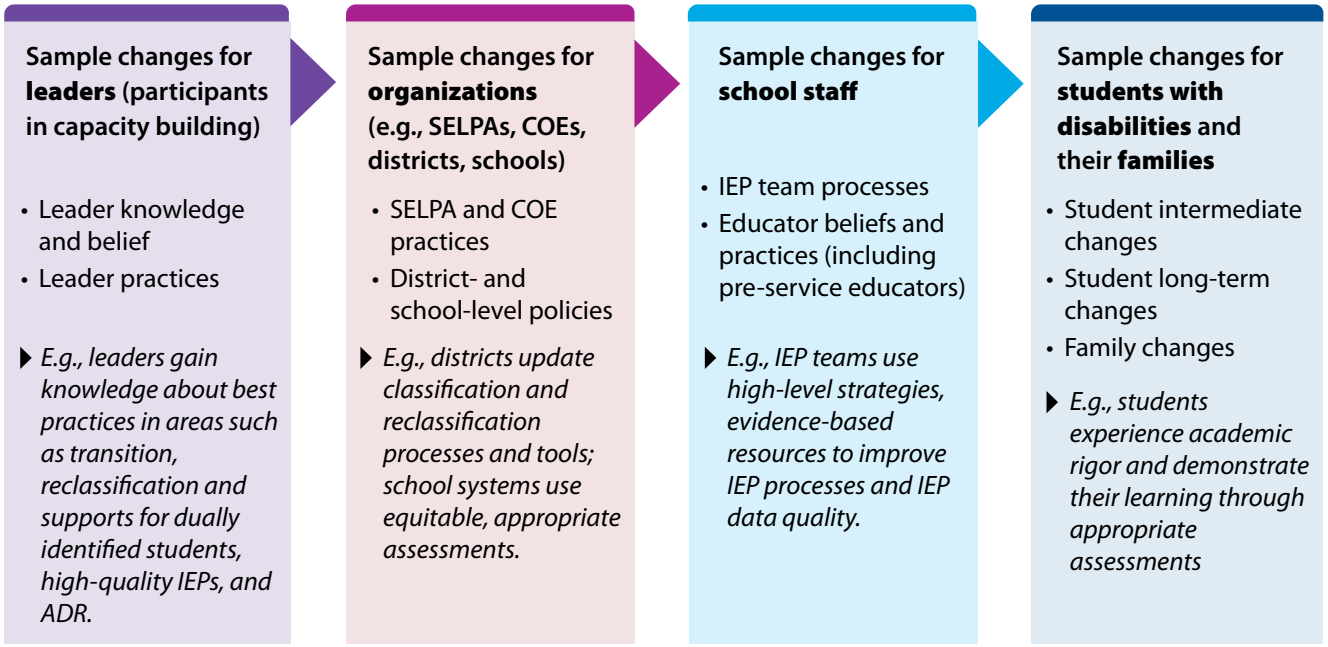
SERL leaders described **multiple levels of impact of their work**. **Exhibit 11** offers examples of impacts SERL leaders described their work was having (or was anticipated to have) on *education leaders* (participants in capacity-building work), those leaders' *organizations* (e.g., SELPAs, COEs, districts, schools); *school staff* (e.g., teachers, case managers); and, ultimately, *students with disabilities and their families*.

There is a distance between the capacity building that SERLs provide and student outcomes. Therefore, the logic model depicts a linked relationship among the outcomes, where we collect data as evidence in the pathway from capacity building to student outcomes. An area of focus for Year 3's evaluation is to address the data gap in these levels (see Recommendations). However, some SERLs and some participants were able to speak about student level activities from capacity building efforts to date. MuSE described an example of such a chain of impact. The SERL provided leaders of an LEA with resources "to support students having more access to the general education environment." Schools and staff within the LEA implemented suggested systems and practices (e.g., universally designed lessons), and dually identified students experienced rates of placement in the Least Restrictive Environment that ended up substantially exceeding the related compliance and improvement monitoring goal the LEA had set.

SIL described another example of student impact related to an improvement network focused on graduation. The leaders of one participating LEA created a graduation checklist and master schedule to monitor and support students' progress toward high school completion. Systematic use of these tools within the LEA's schools resulted in a significant increase in graduation rates across a 2-year period.

Exhibit 11 offers examples of impact at different levels, from participant knowledge and behaviors to participant influences on organizations, staff, and students.

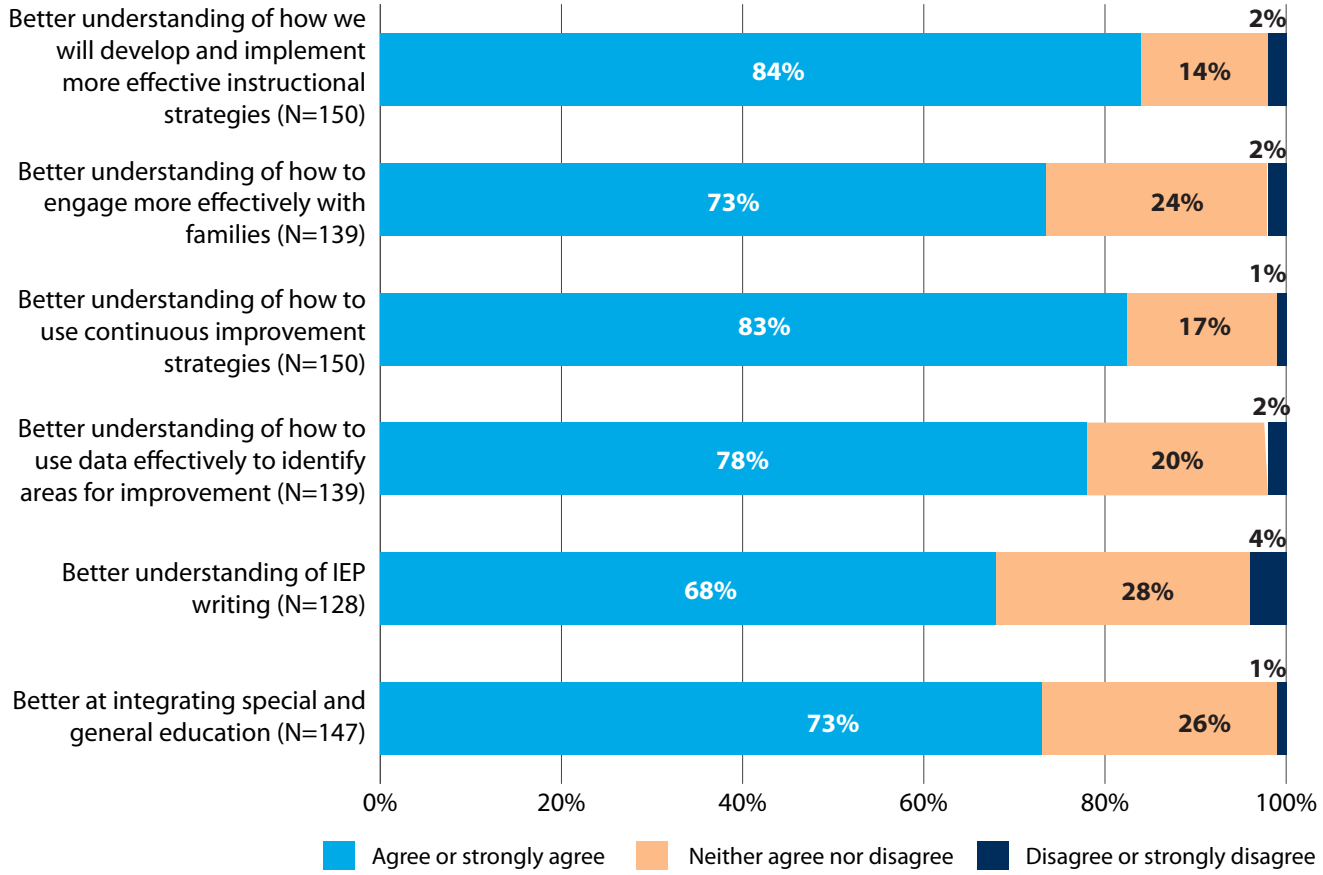
Exhibit 11. Overview of SERLs' multiple levels of impact



Participants' Perspectives on Impact

A final set of survey questions asked respondents to reflect on the impact of work with their SERL on their sites' capacity to serve students with disabilities. More than two-thirds of respondents agreed that their site was better positioned to serve these students as a result of their work with their SERL: 67% agreed that their site had a better understanding of IEP writing,[7] 77% felt their site had a better understanding of how to identify areas for improvement; 73% reported engaging more effectively with families, and 73% reported being better at integrating special and general education. More than 80% agreed their site had a better understanding of how to use continuous improvement strategies and how they would develop and implement more effective instructional strategies.

Exhibit 12. Participants' perspectives on the impact on their sites of SERLs' capacity-building supports



[7] IEP writing, like the other domains also on this list, is addressed by multiple SERLs, but emphasized by some more than others based on their charge. If IEP writing was not addressed, survey respondents had the option to choose "not applicable."

When asked in an open-ended survey question to write about **improvements** they were seeing as a result of working with a SERL, participants most often described an increase in awareness and implementation of inclusive practices; making changes to IEP practices and/or processes; and utilizing professional development resources and training locally. Participants reported that:

- "By focusing on students' strengths and incorporating interest-based learning activities, students gained confidence in their abilities. For example, a student with dyslexia who once avoided reading aloud now volunteers to read short passages after receiving targeted interventions that improved fluency and comprehension."
- "One major improvement was the development and implementation of a more culturally and linguistically responsive IEP process. With the Lead's support, we revised goals to better align with both language development and functional academic skills, using strategies that are more inclusive of students' home languages and cultural backgrounds."
- "[SERL name] connected us with resources, technical advisors, and collaborators. Additionally, they guided us through our CIM [compliance and improvement monitoring] Plan implementation."

Some participants also wrote about seeing increased collaboration in their sites, strengthening supports for families, and collecting and analyzing data to make informed decisions about areas of focus to support students with disabilities.

Overall, SERLs and participants shared positive perspectives of impact on participant practices and how they have observed or anticipate observing their practices influencing student outcomes. However, gaps in measuring impact remain, including measuring student-level impact, inconsistencies in data tracking, and variation in survey participation.

Recommendations

The following recommendations address how RTI and CCEE, in collaboration with state agency partners, can support SERLs in evaluating progress and impact of their connections and capacity-building goals. The recommendations address a focus on continued alignment and documentation of how SERLs' work impacts student achievement. The following recommendations emerged from our analysis of data, and are organized by relevant partner.

For SERLs

Recommendation. Plan and implement impact metrics aligned to goals and increase impact documentation.

- **Rationale:** In Year 1, the external evaluation recommendations involved aligning logic models and reporting, which showed improvements in Year 2. With RTI and CCEE's support, SERLs expanded their goals and clarified links to activities and outcomes. In Year 2, SERLs identified multiple levels of impact of their offerings and resources on participants, whether known or anticipated. These examples describe the actions of participants and how they influence districts, schools, other staff, and students with disabilities. The actions and influences are evidence-based to logically lead to outcomes for these students, such as increased attendance, achievement, and graduation rates. Further planning of data collection and sharing would improve reporting of impact.
- **Action:** Define metrics, especially for evidence at the school level, related to teacher and service provider practices and impact on student engagement. Collect and document to help provide evidence and impact exemplars for meeting SERL goals.

Recommendation: Define capacity building approaches to help external evaluation manage SERL participant lists, administer and analyze surveys, and communicate activities and impact for interest holders.

- **Rationale:** The SERLs were successful in adapting resources per local and statewide needs, and providing high-quality and relevant capacity building to meet participant needs. They also served LEAs with specific needs as identified by CDE and provided varied offerings to LEAs, COEs, SELPAs, and others throughout the state. However, the variation among SERLs poses an evaluation challenge.
- **Action:** Standardize definitions of capacity-building approaches to include criteria such as the SSOS definitions of universal, targeted, and intensive; offering duration, frequency, and hours; and target audiences.

Recommendation: Provide evidence of SERL-to-SERL connections and connections within and beyond the SSOS, and how these connections lead to effective direct support; assess balance of connections with service delivery.

- **Rationale:** SERLs connected with each other, within the SSOS, and external to the SSOS. Increased collaboration among SERLs and with partners across the SSOS is a clear strength of the initiative and reflects meaningful progress in building a more interconnected SSOS. These connections led to developing resources from multiple expertise perspectives, learning from one another to create measurement systems, using a common vocabulary within the SSOS, and building and sharing community resources to support students with disabilities. Additionally, participants agreed that they connected with others outside of their context, and that the connections were helpful. SERLs and RTI could collect examples of changes participants made in districts and schools as a result of their connections in the wider community supporting students with disabilities.
- **Action:** SERLs should continue to balance connections and direct support, and provide examples of co-developed or co-offered sessions and how the connections influenced direct support and associated practice in districts and schools. SERLS should seek support from state agency partners to help SERLs assess the proportional investment of time across system-building and service delivery activities for strategic alignment with their goals.

For State Agencies and RTI

Recommendation: Help SERLs define and track SERL offerings.

- **Rationale:** In Year 2, SERLs provided participant lists for survey administration. These lists included between 20 and 600 participants who received universal or targeted capacity building and excluded participants in intensive compliance improvement monitoring status as assigned by the Special Education Division (SED) at CDE. The survey completion rates as disaggregated by SERL were between 12% and 75%, with an average response rate of 23%. Of participants who started the survey, 23% indicated no SERL involvement, 27% indicated low SERL involvement, and 50% identified either medium or high involvement with SERLs. Defining and tracking SERL offerings would help with survey administration and response rates.
- **Action:** State agencies and RTI could support SERLs in defining offerings in alignment with above definitions (universal, targeted, and intensive offerings using the SSOS definitions). Criteria should include intended audience and participants, duration, and professional learning elements engaged to help alignment of metrics to outcomes. State agencies should help SERLs track offerings through a process and procedure to curate professional development offerings, dates, hours, and participants, and communicate participation.

Recommendation: Provide support to enhance data collection metrics.

- **Rationale:** The first recommendation for SERLS above is to plan and implement impact metrics aligned to goals and increase impact documentation. As described, RTI and state agencies supported SERLs in developing logic models, and identifying metrics for impact data collection. Continuing implementation support can help to improve impact reporting for the external evaluation.
- **Action:** State agencies and RTI partners should provide technical assistance to Leads to collect descriptive data for impact evidence, with an emphasis on using measures for participant actions and the influences of participant actions on schools, staff changes, and student engagement and achievement metrics.

Appendix A

In our final evaluation report of SELPA Lead Agencies (June 2023), RTI identified nine essential features that SELPA Leads implemented that reflected the research base on effective networks in education, professional development, and systems change. We combined these features with a list of other high-quality professional learning elements to produce the set of features below. In our focus groups with SERLs, we asked leaders to reflect on the list and speak about features of their capacity building work in Year 2 that seemed particularly impactful.

Helpful features from past SELPA Leads & essential features of effective networks/PD/ systems change

- Coaching
- Sufficient time and formats for learning
- Teaming that integrates Special Education and General Education
- Building positive relationships
- Resources and tools
- Collaboration and networking
- Positive environment
- Tailored trainings
- Evidence-based practices
- Practice opportunities
- Focused on leadership; delivered by expert leaders