

MODULE 2: LEVERAGING THE EIR KNOWLEDGE BASE



WORKSHOP LEADERSHIP



Tom DeWire
Founder and Principal Consultant
EdScale
www.edscalellc.com



Phillip Caldwell, II, Ph.D.
Founder and President
Resolute Educational Solutions
www.resedsolutions.com



AGENDA

Time	Activity
1:00	Welcome & Setting the Stage
1:05	Icebreaker: Shared Vision, Communication and Teamwork
1:30	Investigating a Sustainability and Scaling Rubric
2:00	Break
2:05	Scaling Up and Sustainability Strengths and Opportunities While Maintaining an Equity Focus
2:20	Understand the Process of Ideation and How To Link it with your Logic Model, Management Plan, and Evaluation Plan
2:55	Next Steps

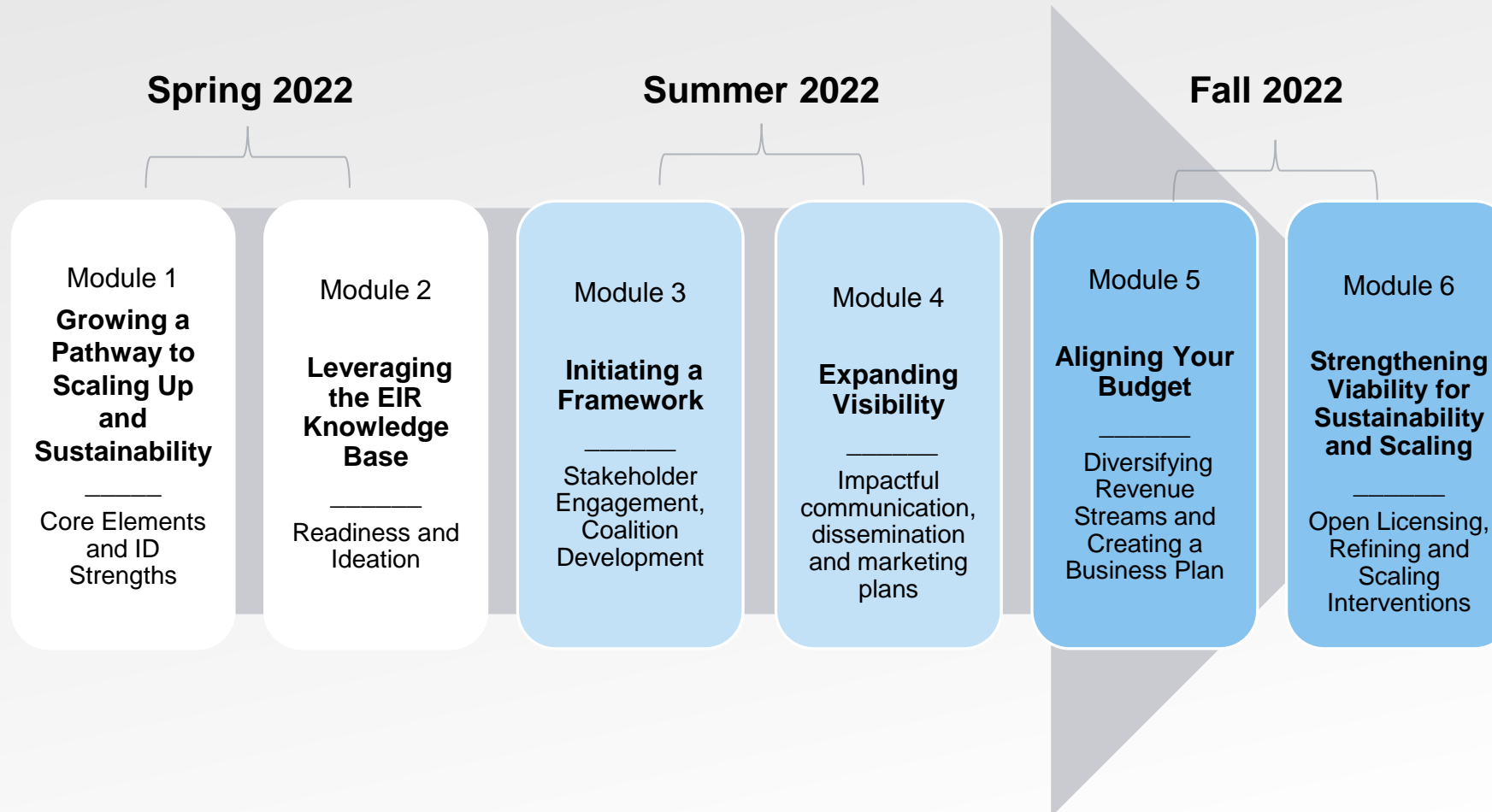


MODULE 2 LEARNING OBJECTIVES

- Investigate a Sustainability and Scaling Rubric
- Unpack/debrief scaling up and sustainability strengths and opportunities while maintaining an equity focus
- Understand the process of ideation and how to link it with your logic model, management plan, and evaluation plan - answer "what are you investing in and how are you addressing an unmet need?"



WHAT'S AHEAD: SUSTAINABILITY AND SCALING TRAINING



Note: Modules 3 through 6 may adjust to best meet grantee feedback and needs.



ICE BREAKER

SHARED VISION, COMMUNICATION AND TEAMWORK



SESSION #1 RECAP: SCALING UP GOALS

- **Develop sustainable and replicable models** for expansion to other schools, districts and states
- **Foster buy-in from partners:** teachers, administrators, legislators, students, parents, companies
- **Change mindset of participants:** especially teachers, through PD and coaching
- **Allow product iteration** by program or user to find “best fit” for existing system
- **Achieve measurable impact** on student performance metrics by gathering data



SESSION #1 RECAP: COMMON GROUND

Scaling looks like:

- Statewide and multi-state expansion
- Collaboration to share best practices and lessons learned

Sustainability looks like:

- Active involvement from stakeholders
- Teachers and schools continue implementation independently
- Integrating work into existing systems

Equity looks like:

- Teachers foster community by understanding their schools, students, and their needs
- Access and participation for and from students



SCALING AND SUSTAINABILITY RUBRIC⁽¹⁾ FOCUSING ON KEY COMPONENTS TO REACH GRANTEE GOALS

Grantee Capacity	Results and Performance Management	Stakeholder Support
1. Align organizational structure with goals	5. Set outcome targets to achieve goals	11. Identify implementation sites aligned with goals
2. Build an organizational culture of professional learning	6. Develop plan(s) that align strategies with goals	12. Strengthen stakeholder support and build a coalition
3. Extend capacity in the field	7. Establish clear leadership of goals	13. Build broad public support
4. Extend capacity through partnerships	8. Ensure quality data on implementation and performance is available and used to review progress and make mid-course corrections	
	9. Link internal and external accountability to results	
	10. Disseminate results to all stakeholders	

i3 Sustainability Rubric; A tool to help i3 grantees assess their readiness to sustain and scale. February 2016



REFRAMING GRANTEE CAPACITY: (1) ALIGNING ORGANIZATIONAL STRUCTURE WITH GOALS

Reframing problems from various organizational (group and individual) perspectives (deep, emotional, broad and dynamic) to identify pain points and make new solutions possible.

Using the padlet link in the chat, identify:

- **Roses:** Analyze the holistic organizational environment for the ideal conditions for equity, sustainability and scaling of your work project/program/initiative, i.e. how has the program been successful?
- **Thorns:** To define the group or individual explicit pain points in terms of organizational capacity, i.e. what was most stressful during the project?
- **Buds:** Reframe the EIR innovation context to identify the most game-changing part of the problem, i.e. what are you looking forward to with this work?



REFRAMING GRANTEE CAPACITY: (2) BUILD AN ORGANIZATIONAL CULTURE OF PROFESSIONAL LEARNING



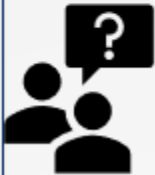
Planning: What is your plan for implementing the professional learning community process in your organization? What specific steps do you plan to take and when will you take them? What are you doing to align the practices and processes of your organization with the goals of the project?



Monitoring: How are you monitoring the productivity of your teams? How will you assess the results of this initiative in your organization?



Modeling: How are you modeling a focus on the project goals and your commitment to collaboration? What have you done to create a guiding coalition to assist you in this important endeavor in your organization?



Driving questions: What questions have you posed to guide the work of the teams and the progress of the initiative?



Allocating time: What steps have you taken to give every collaborative team time to work together during the day, week, month or year?



Celebrating: What are you doing to celebrate the work of teams and the progress of your organization in order to sustain this initiative?



Confronting: What resistance and obstacles have you encountered and how have you responded?



REFRAMING GRANTEE CAPACITY: (3) EXTEND CAPACITY IN THE FIELD

Leveraging your EIR Evaluator to extend your work in the field.

Using the poll link in the chat, rank in order of importance:

- Help with identifying measures and data collection on goals and targets.
- Help understanding the size and diversity of people where intervention is tested (or can be a previously tested version of the intervention with new features).
- Help with documenting key components that are necessary for the program.
- Providing information on generalizability of intervention findings (who can results be generalized to).
- Providing a description of fidelity of implementation and relationship between fidelity and outcomes.
- Help thinking through cost and cost effectiveness.



BREAK



PUTTING THE PIECES TOGETHER: IDEATION, LOGIC MODEL, MANAGEMENT PLAN AND EVALUATION PLAN



FROM SESSION #1: PRE-MORTEM

“It’s 2032. Scaling up has been an unmitigated disaster. What went wrong?”

- **Failed expansion:** overestimated capacity and underestimated complexity
- **Lack of ownership** from schools, districts, and states
- **“Poo-pooed the naysayers:”** ignored feedback from adversaries
- **No more funding,** and partners lost, due to shifted priorities
- **Teacher and administrator attrition** due to lack of support
- **“Worst-fit:”** forced standardized and “scripted programs” without changes





<https://www.youtube.com/watch?reload=9&v=qpa1unHS1qY>

HOW IS FEEDBACK HELPFUL NOT JUST IN DESIGN BUT ALSO IN SCALING AND SUSTAINABILITY?

“Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”

- Abraham Lincoln

"The road to education reform is littered with good ideas, poorly executed."




- Joel Klein

- Such a high percentage of startups and established business fail each year because of not adjusting their business model with the market
- According to the book *Scaling Up* by Verne Harnish, only 6% of companies will reach 1 million in sales, making it an exceptional achievement but still attainable
- If you have a clear plan – and are ***always testing new pieces and simplifying as possible*** – it increases your chances of success



SRI AND IES RECOGNIZED THE NEED AND VALUE FOR THIS WORK IN 2021

Exhibit 1. I-A-T Framework Scaling Activities by Solution Readiness Levels and IES Research Phases

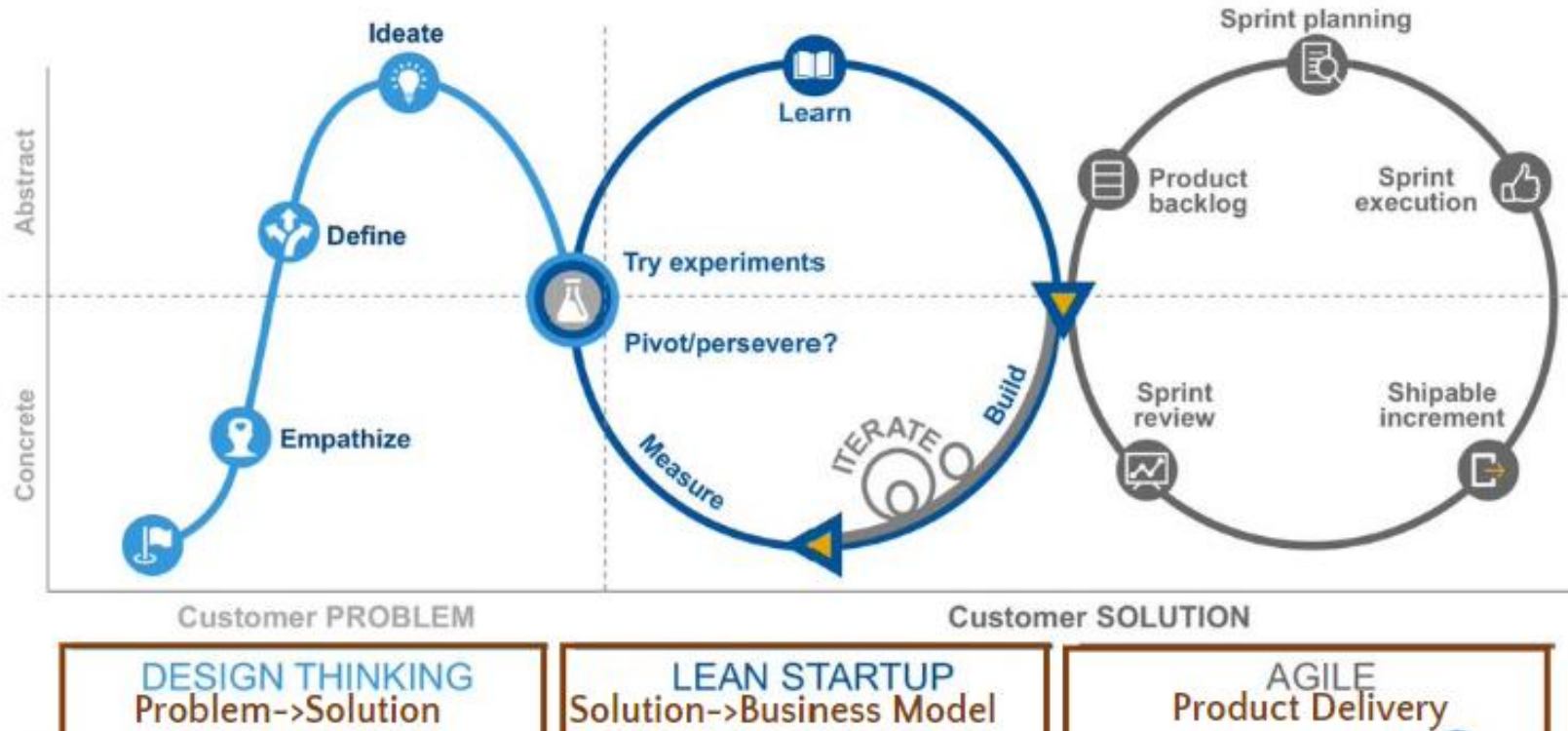
Solution Readiness Level (SRL)	I-A-T Scaling Activities	IES Research Phases
SRL 1 Invent 	Needs hypothesis Key performance indicators hypothesis Solution hypothesis (minimum viable product) Basic prototype performed Initial PRCC analysis	Exploration Innovation and Development
SRL 2 Apply 	Product-user fit hypothesis Champion(s) identified Stakeholder mapping Initial market and differentiation analysis Product-market fit hypothesis	Innovation and Development Efficacy and Replication Studies Effectiveness Studies
SRL 3 Transition 	Scaling pathway hypothesis 4 T's Pitch deck	Effectiveness Studies

(1) <https://www.sri.com/publication/from-research-to-market-development-of-a-transition-process-to-integrate-sustainable-scaling-methodologies-into-education-innovation-research-design-and-development/>



IDEATION AND ITERATION ARE CRITICAL FOR ALL PHASES OF SCALING AND SUSTAINABILITY

Combine Design Thinking, Lean Startup and Agile



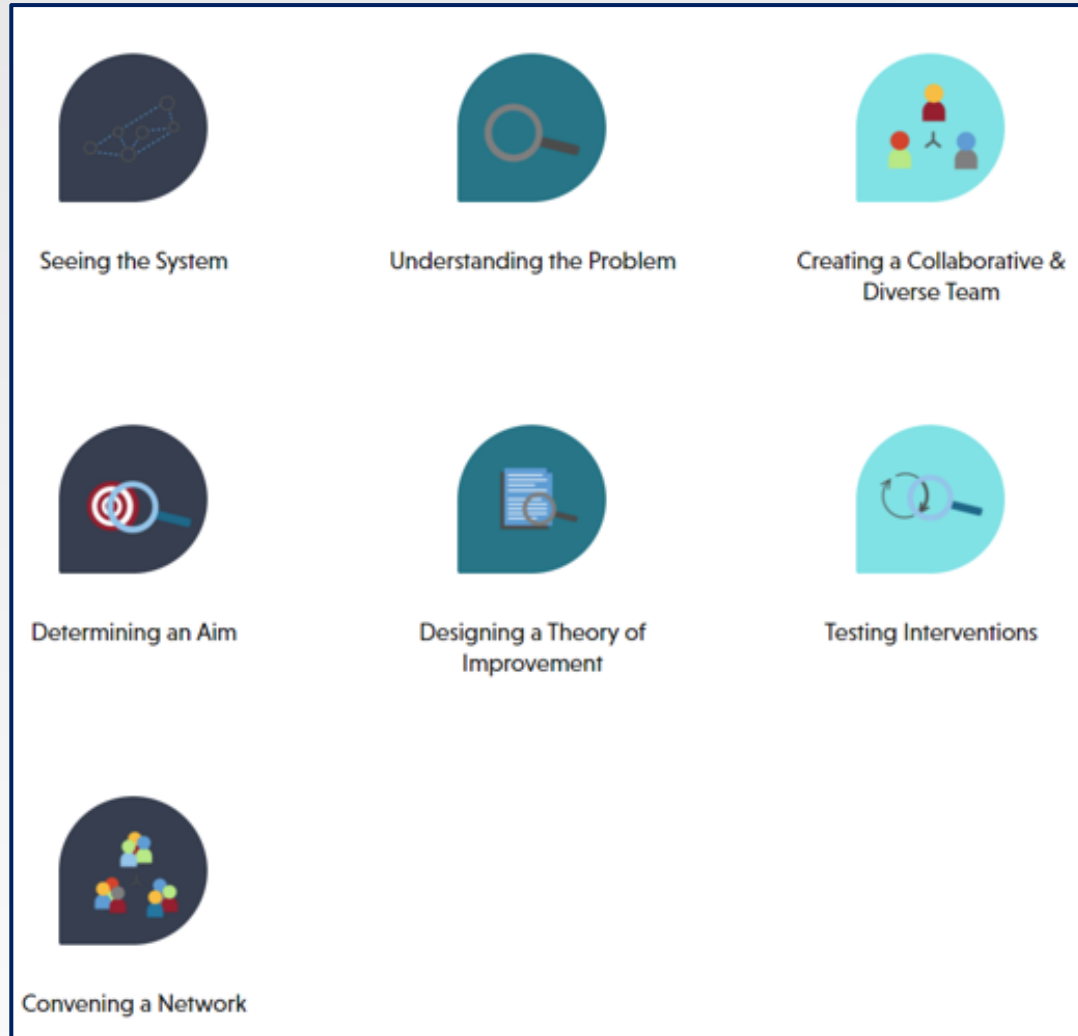
#GartnersYM

21 CONFIDENTIAL AND PROPRIETARY | © 2016 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner and IToo are registered trademarks of Gartner, Inc. or its affiliates.

Gartner.



EQUITY SHOULD BE BUILT INTO EACH PART OF THE DESIGN, FEEDBACK, SCALING UP, AND SUSTAINABILITY PROCESS



The Continuous Improvement for Equity Project, led by a Design Team, identified opportunities for infusing equity into seven steps common to most continuous improvement processes. While analyzing these seven components of continuous improvement processes, the Design Team ***developed a list of equity considerations for each step and curated a set of aligned resources to support educators as they engage in that step.***



Disciplined inquiry cycles test interventions and collect and analyze data to assess if changes are an improvement.

Equity Considerations

DESIGN AND PROCESSES

- ››› Is testing focused on changes explicitly designed to interrupt inequitable practices?
- ››› Has the purpose of testing been effectively communicated to the community?
- ››› Who is engaged in the testing process? How frequently are these groups engaged?
- ››› What role do content experts play in testing? How is research used and privileged?
- ››› How are those most impacted by change ideas involved in testing?
- ››› Is the approach strengths-based?
- ››› How is data collected and analyzed? Who makes decisions based on this information?
- ››› How is data shared? By whom and with whom?
- ››› Does the data collection process provide new opportunities to revisit project aims, goals, and structures to advance more equitable outcomes and continue to challenge bias?

BUILDING CAPACITY

- ››› Has the team established norms and conditions that embrace vulnerability, humility, and curiosity such that people feel safe and supported in testing and learning?
- ››› How have the lived experiences of communities and their families helped guide the testing process?
- ››› Do “those in charge” (e.g., school leaders) support the inquiry process, unleashing resources and building infrastructure to support tests of change?
- ››› Do those conducting tests of change have the ongoing preparation and resources necessary to analyze and reflect on new findings and adjust their understanding and/or practice as needed?
- ››› Who has access to data? How is data shared for consumption and action?

MEASURING SUCCESS

- ››› How has testing increased understanding of the challenge and improvement strategy?
- ››› Who is involved in determining if progress is being made?
- ››› Does the testing process account for historical and local contexts?
- ››› Does testing account for the impact of both in-school and out-of-school factors on learning outcomes?
- ››› Are systemic inequities addressed and/or better understood?
- ››› How does the team determine when to move from tests to scaling solutions?

SHARING LEARNINGS

- ››› How are learnings about what worked and what didn't work communicated to communities and their students?
- ››› How is new knowledge derived from testing organized and codified? Is it easily accessible?
- ››› Do all groups have equal resources and access to information? If not, how does this impact equitable improvement, and what can be done to level the playing field?
- ››› How are lessons learned elevated to inform the next round of testing?

Created by: Continuous Improvement for Equity Design Team

EQUITY SHOULD BE CONSIDERED AT ALL STEPS

How do you consider equity in testing/refining your intervention as part of the:

- Design Process
- Building Capacity
- Measuring Success
- Sharing Learnings



BREAKOUT 1

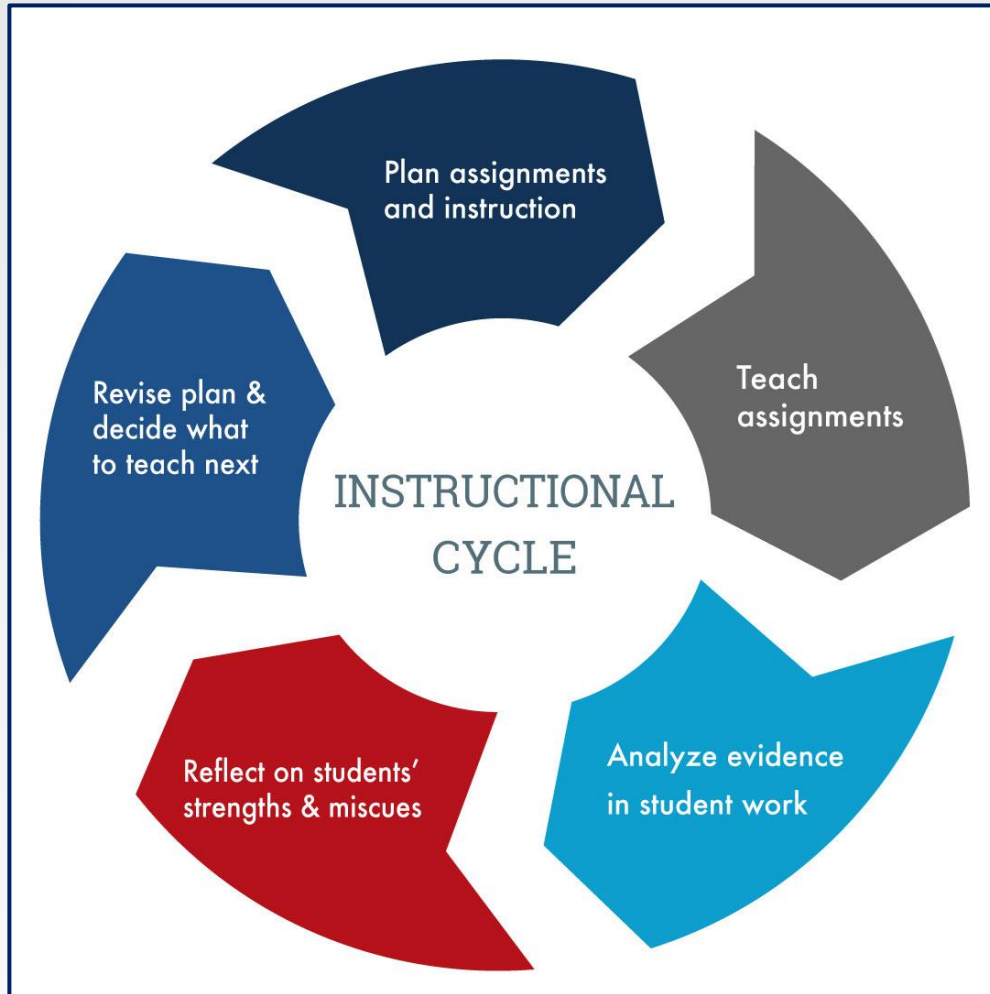


HUMAN-CENTERED DESIGN ANCHORS ALL OF THE APPROACHES

<https://www.youtube.com/watch?v=musmgKEPY2o>



THE MODEL: LEARNING DESIGN COLLABORATIVE (LDC) INSTRUCTIONAL CYCLES AND JOB-EMBEDDED PLANNING MEETINGS



- Start with current curriculum, textbooks, etc.
- Select focus standards
- Ensure a standards-aligned writing task and ladder
- Teach!
- Analyze student work



i3 Year 1 Observation: Variable Progress Across Teacher Groups

Problem 1

The purpose for engaging in this work (the “why”) not clear to principals or teachers

Problem 2

Literacy coaches not used to pacing teachers through a cumulative, systematic, evidence-based PD model



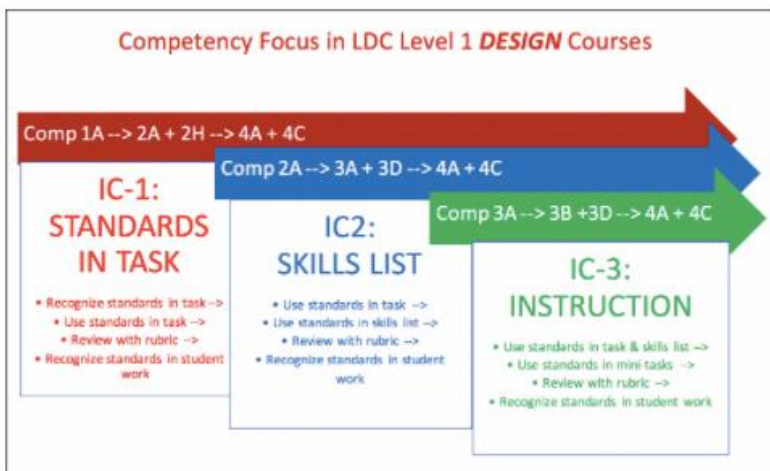
Responding to Problem 1: Embedding Recruitment and Teacher Work in School Goals/Problems of Practice

Action Item: Select Your Own Professional Learning Goals



In this course, you will complete your first LDC Instructional Cycle—you will plan, teach, reflect on, and revise your first LDC assignment. As you build your LDC assignment, you will also be building 20 important instructional skills, or competencies.

This course focuses on the following LDC Teacher Competencies: 1A → 2A + 2H → 4A → 4C.



Click below for directions on how to explore the LDC Teacher Competencies.

[Explore LDC Teacher Competencies](#)

Competency 1 Analyze Assignments Aligned to Standards and Student Learning Goals

- A. Recognize the focus set of short- and/or long-term student learning goals (or SLOs) for an assignment that meets the expectations stated in external benchmarks (CCR and content standards).
- B. Recognize how the skills and/or content of an assignment align to the expectations of the prompt.
- C. Recognize how a sequence of assignments aligns to the expectations of the prompt, CCR and content standards.

Competency 2 Construct a Quality Assignment Prompt

- A. Select a focus set of short- and/or long-term student learning goals (or SLOs) that aligns to the expectations stated in external benchmarks (CCR and content standards).
- B. Select an appropriate content central to the discipline, a specific set of focus standards and/or content standards.
- C. Select complex texts rich in content, a specific set of focus standards and/or content standards.
- D. Choose a student work product that aligns to the focus standards and/or content standards.
- E. Choose content central to the focus standards and/or content standards.
- F. Design a prompt that aligns to the focus standards and/or content standards.
- G. Select a research-based student work product that aligns to the focus standards and/or content standards.
- H. Assess the quality of an assignment's sequence of instruction based on an accepted curriculum rubric (e.g. SCALE, EQUIP) and make relevant edits or changes to improve that sequence.

Competency 3 Develop a Quality Instructional Plan

- A. Backwards-design a sequence of skills and/or subskills from a prompt aligned to specific focus standards and/or student learning goals.
- B. Select instruction that allows for ongoing checks for understanding and progress monitoring of student skill development by explicitly asking students to demonstrate each of the skills needed to meet the expectations of the prompt, the focus standards, and/or student learning goals.
- C. Use knowledge of students (skill levels, interests, learning styles, etc.) to differentiate instruction that supports all students in completing the assignment and demonstrating the focus standards and/or student learning goals.
- D. Assess the quality of an assignment's sequence of instruction based on an accepted curriculum rubric (e.g. SCALE, EQUIP) and make relevant edits or changes to improve that sequence.
- E. Sequence multiple assignments into units or courses to ensure students receive instruction organized and aligned toward focus standards and/or student learning goals across content areas and/or grade levels.

Competency 4 Assess Outcomes and Iterate Instruction

- A. Score and give feedback on student work products utilizing a research-based student work rubric.
- B. Derive data from student work products by recognizing common patterns (such as conceptions, preconceptions, misconceptions) in student thinking and skill development.
- C. Use data and feedback from student work and common patterns in student thinking and skill development to plan new or future assignments and/or to revise an assignment for re-teaching or publication.
- D. Use data to revise a sequence of assignments (in a unit or course) to ensure students receive instruction organized and aligned toward focus standards and/or student learning goals across content areas and/or grade levels.



Responding to Problem 2: Development of a Systematic, Competency- and Evidence-Based PD Model

- Creation of instructional cycles (tying course content to PDSA cycles and LDC instructional competency development)
- Creation of Coach Certification Process and badges
- Usage of analytics reports monitor coach progress toward certification , and teacher progress through instructional cycles

Design a Task / Assignment Spiral Map

Instructional Cycle 1 Standards-Driven Task— 1A & 2A		Instructional Cycle 2 Standards-Driven Skills List		Instructional Cycle 3 Standards-Driven Instructional Sequence	
Session	Topic & Exit Slip	Session	Topic & Exit Slip	Session	Topic & Exit Slip
.5	Introduction to the work; competency focus				
1	Set goals; decide when to teach next module	1	Review goals; competency focus; decide when to teach next module	1	Review goals; competency focus; decide when to teach next module
2	Analyze and code student work for standards	2	Mental Markers; select focus standards and template	2	Select focus standards and template
3	Make a focus cluster work; code tasks for focus standards	3	Select text, product, content, and rubric; pitfall review, CAR task self-review	3	Select text, product, content, and rubric; pitfall review, CAR self-review
4	Select focus standards and template	4	Respond to task; create draft skills list	4	Respond to task; complete skills list
5	Select text, product, content, and rubric	5	Analyze skills list alignment, continue draft skills list	5	Select rubric; analyze mini-task alignment
6	Pitfall review; CAR task self-review; revise task	6	Complete skills list, select rubric	6	Select mini-tasks
7	Respond to task and finalize skills list	7	Finalize instruction (mini-tasks), overview, and background	7	Complete instructional sequence of mini-tasks
8	Finalize instruction (mini-tasks); overview & student background; get ready to teach	8	Pitfall review; CAR module self-review; get ready to teach	8	CAR module self-review; overview & student background; get ready to teach
TEACH MODULE		TEACH MODULE		TEACH MODULE	
9	Analyze student work	9	Analyze student work	9	Analyze student work
10	Reflect; revise; decide on next assignment/s	10	Reflect; revise; decide on next assignment/s	10	Reflect; revise; decide on next assignment/s



BREAKOUT 2



NEXT STEPS

- **Explore the tools further (shared with the recording in the Grantee Resource Library)**
- **Attend the Performance Measures workshop - June 2022**
- **Attend Module #3 - Initiating a Framework - watch for registration announcement coming soon.**
 - Market Analysis and Differentiation
 - Stakeholder & Champion Identification
 - Sharing Your Story



RESOURCES

- U.S. Department of Education **EIR Program** – EIR@ed.gov
- Links to the rubrics, EIR/i3 papers and any additional resources referenced in the workshop can be found in the **EIR grantee Resource Library** at: <https://anlar.knack.com/eir-ta#home/>
 - UserName: eirta@anlar.com
 - Password: resources4EIR
- EIR Sustainability and Scaling **Community of Practice (CoP)** and other CoPs- EIRTA@anlar.com



THANK YOU!

