MODULE 1:
GROWING A PATHWAY TO SCALING UP AND SUSTAINABILITY

WELCOME AND INTRODUCTIONS

WORKSHOP LEADERSHIP

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MODULE 1 LEARNING OBJECTIVES

- Understanding the core elements for sustainability and scaling, based on research and frameworks

- Identifying project strengths and opportunities for scaling up readiness and strategies
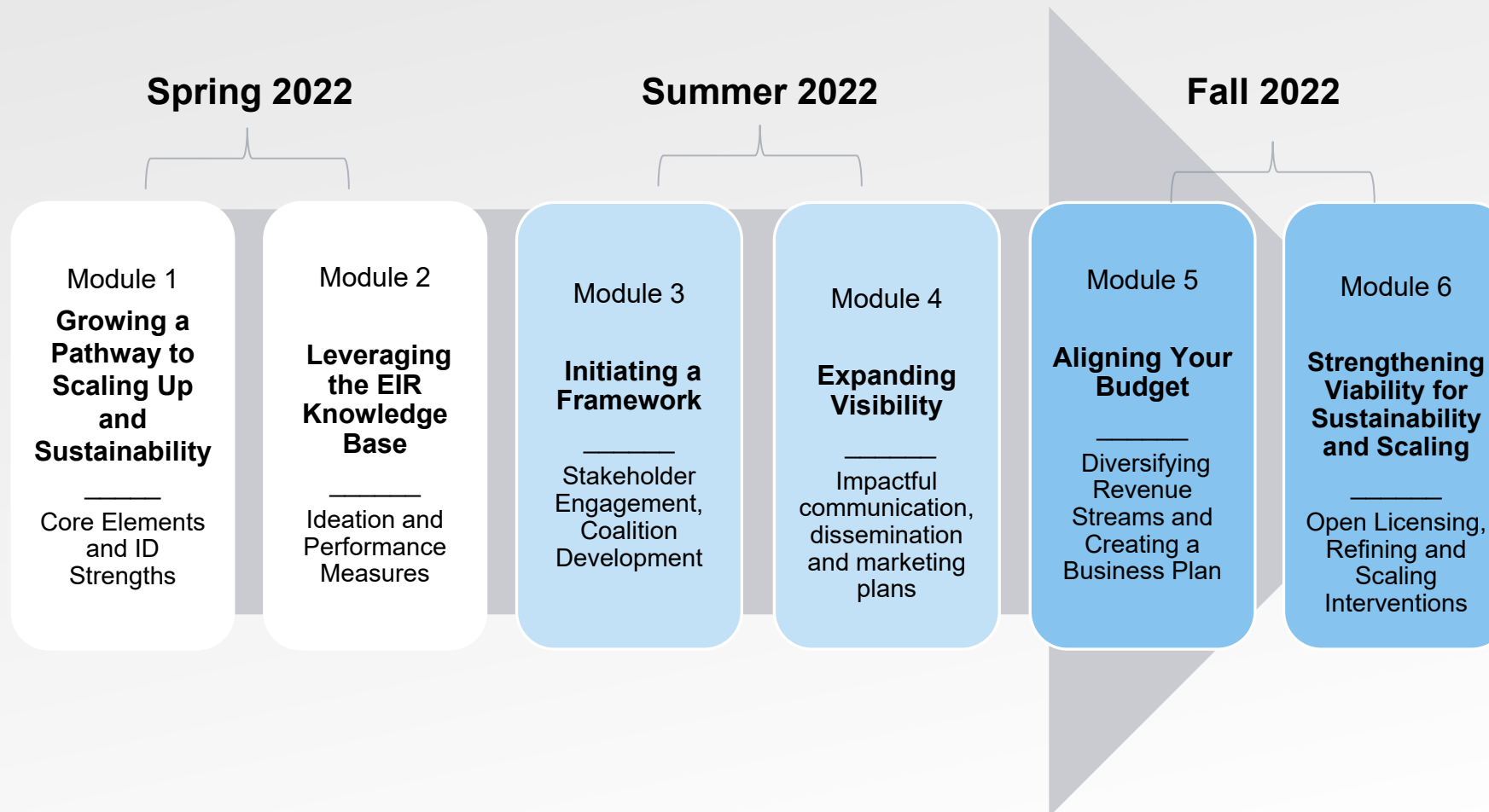
AGENDA

Time	Activity
1:00	Welcome & Setting the Stage
1:10	Core Elements of Sustainability and Scaling
1:25	Identifying Project Strengths and Opportunities for Scaling Up – Readiness and Strategies
1:55	Break
2:05	Design and Factors Facilitating Sustainability and Scaling Up and Visioning
2:30	Challenges
2:50	Next Steps: Introduction to Needs Assessment

WHAT'S AHEAD: SUSTAINABILITY AND SCALING TRAINING

Spring 2022

Summer 2022

Fall 2022

Module 1

Growing a Pathway to Scaling Up and Sustainability

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Core Elements and ID Strengths

Module 2

Leveraging the EIR Knowledge Base

———

Ideation and Performance Measures

Module 3

Initiating a Framework

———

Stakeholder Engagement, Coalition Development

Module 4

Expanding Visibility

———

Impactful communication, dissemination and marketing plans

Module 5

Aligning Your Budget

———

Diversifying Revenue Streams and Creating a Business Plan

Module 6

Strengthening Viability for Sustainability and Scaling

———

Open Licensing, Refining and Scaling Interventions

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

FINDING COMMON GROUND

Using the Padlet link in the chat, identify:

- What does equity look like in your work?

- What does sustainability look like in your work?

- What does scaling look like in your work?

EIR EQUITY PRIORITY

FEDERAL REGISTER
The Daily Journal of the United States Government

Ⓝ Notice

Applications for New Awards; Education Innovation and Research (EIR) Program-Expan...

A Notice by the Education Department on 06/07/2021

Invitational Priority 2—Promoting Equity and Adequacy in Student Access to Educational Resources and Opportunities is intended to offer applicants the option of proposing projects that promote equity. Improving educational equity and adequacy is a priority for the Nation's education system, with particular emphasis on supporting underserved students. For example, the Department's 2018 news release on STEM course-taking reported that of students enrolled in Calculus courses, 8 percent were Black, when Black students represent 16 percent of high school enrollment. A similar trend exists for physics courses in which 12 percent of Black students were enrolled. (U.S. Department of Education's 2015-16 Civil Rights Data Collect STEM Course Taking Report, 2018).

Additionally, during the 2015-16 school year, African American male students comprised 8 percent of students enrolled and 25 percent of students who received an out-of-school suspension. National data show that African American girls are 5.5 times more likely and Native American girls are 3 times more likely

DEFINING SCALING UP

What do we mean by the term, "Scaling Up"?

Scale is multidimensional [1]. It requires:

❑ **Depth** - Deep and consequential change in classroom practice

❑ **Sustainability** - Lasting over time, particularly after the initial implementation push

❑ **Spread** - Moving beyond practices and materials to underlying beliefs, norms, and principles

❑ **Ownership** - Shifting from an external reform to the way business is done

[1]COBURN, CYNTHIA E. (2003). *RETHINKING SCALE: MOVING BEYOND NUMBERS TO DEEP AND LASTING CHANGE.*
EDUCATIONAL RESEARCHER. VOL 32, NO. 6. P 4.

CORE ELEMENTS OF SUSTAINABILITY AND SCALING

Thinking about your current efforts to sustain or scale your projects, to what extent do you agree with the following statements?

- There is a shared understanding among our leadership team of what it will take to sustain or scale-up our project's efforts beyond EIR/i3.

- We have a written plan that is driving our sustainability and scaling-up efforts.

- We have scheduled opportunities to reflect on progress against our plan and make strategic course corrections.

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

SCALING AND SUSTAINABILITY CHECKLIST (2021)[1]

- **Strategy**: How convincing is the scaling strategy?

- **Credibility**: Is the initiative credible?

- **Change Management/Support**: How strong is support for the initiative and the change it entails?

- **Competitive Advantage**: Does the initiative have relative advantage over current state of affairs and alternative solutions?

- **Transferability**: How easy is the initiative to transfer and adopt by education system, particularly adopting government institutions?

- **Fit**: How good is the fit between the initiative and the education system, particularly the adopting government institutions?

- **Sustainability**: Is there a sustainable source of funding?

(1) Brookings CUE, Educate!, MSI, Pratham, STiR Education & VVOB (2021). Education Scalability Checklist. [Online] Available at: https://www.vvob.org/en/news/education-scalability-checklist-resources

IT'S ALL ABOUT DOING THE RIGHT THINGS CONSISTENTLY

Excerpt from "Consistently Good Beats Occasionally Great"

A wonderful case study is Eliud Kipchoge, who just shattered the marathon world record. He's literally the best in the world at what he does. Yet Kipchoge says that the key to his success is not overextending himself in training. He's not fanatical about trying to be great all the time. Instead, he has an unwavering dedication to being good enough.

He recently told *The New York Times* that **he rarely, if ever, pushes himself past 80-90 percent at most—of his maximum effort during workouts. This allows Kipchoge to string together weeks and weeks of consistent training. "I want to run with a relaxed mind"**

13

EQUITY, SUSTAINABILITY AND SCALING

Redefining theories of actions to focus on addressing a systemic problem:

"We have to be intentional about discussing inequities. We have to be able to call out where the challenges are and move out of our comfort zones to shift outcomes." (Pamela Fong, December 2021, REL West)

BREAK

DRAFTING GOALS FOR SCALING UP

Working in small groups, consider:

Vision: What is the vision for your project at scale?

Grant Success: What does success look like by the end of the grant as you move toward that goal?

BREAKOUT

GRANTEE EXPERIENCES SUGGEST FOUR STRATEGIES CRITICAL TO SCALING UP EVIDENCE-BASED PRACTICES

Based on lesson learned from nine i3 grantees who scaled up to serve over 1.2 million students

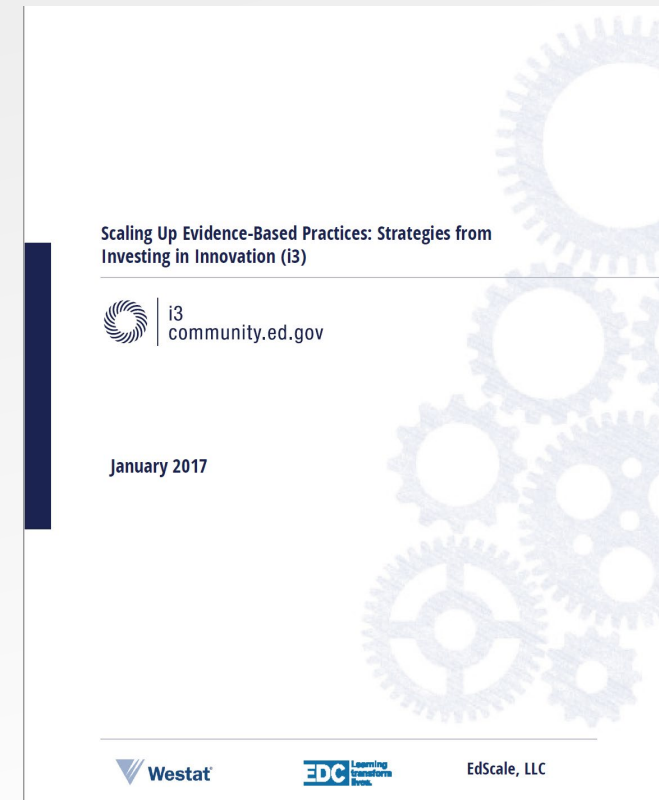Use multiple methods to establish buy in

Build a regional and national infrastructure

Adapt practice based on evidence

Plan for sustainability from day one

Scaling Up Evidence-Based Practices: Strategies from Investing in Innovation (i3)

i3
community.ed.gov

January 2017

Westat | EDC Learning transform lives | EdScale, LLC

STRATEGY #1: USE MULTIPLE METHODS TO ESTABLISH BUY-IN

Grantees lessons:

- Use evidence of effectiveness and storytelling

- Build relationships at all levels
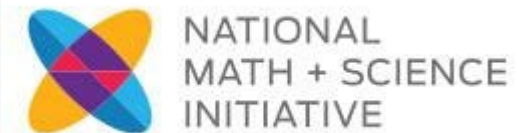
- Help sites identify funding

STRATEGY #2: BUILD A REGIONAL AND NATIONAL INFRASTRUCTURE

Grantees lessons:

- Concentrate resources regionally

- Clarify roles of regional and national offices

NMSI is **FOSTERING** student interest in math and science.

NATIONAL MATH + SCIENCE INITIATIVE

STRATEGY #3: ADAPT PRACTICE BASED ON EVIDENCE
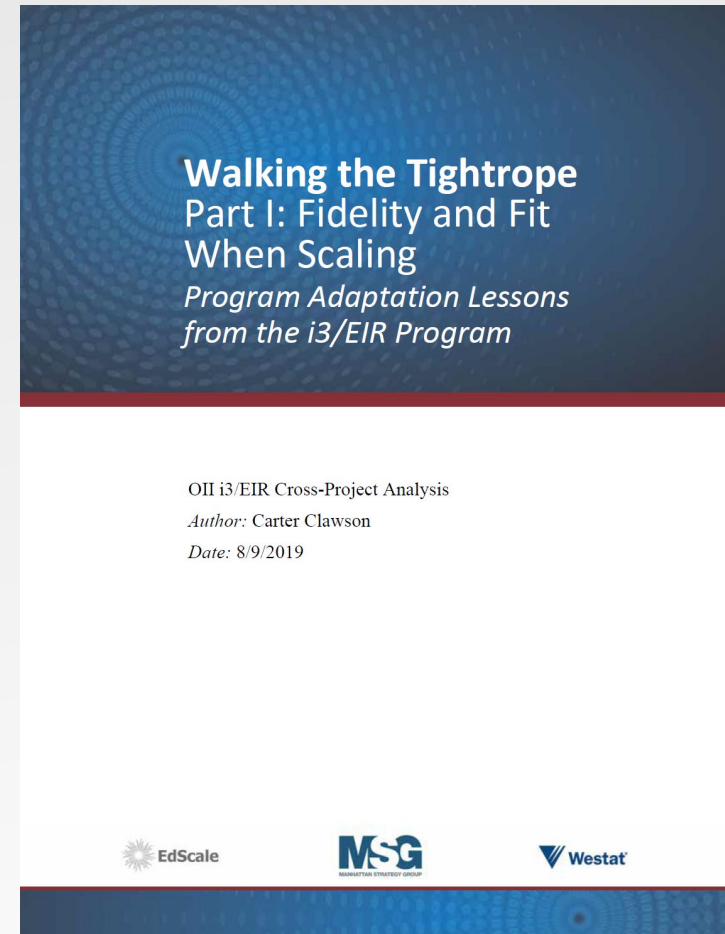
Grantees lessons:

- Stay on top of the latest research

- Conduct regular formative assessments

- Collect stakeholder feedback

- Experiment with components of the intervention

FIDELITY AND FIT

Fidelity is the degree to which a program is implemented as it was intended by its designers.

Fit is the degree to which a program is suited to the specific conditions of a site.

Walking the Tightrope
Part I: Fidelity and Fit When Scaling
Program Adaptation Lessons from the i3/EIR Program

OII i3/EIR Cross-Project Analysis
Author: Carter Clawson
Date: 8/9/2019

EdScale   MSG   Westat

Core Question: How can we authentically support local sites in adapting our program while maximizing program outcomes.

WHY THOUGHTFUL PROGRAM ADAPTATION TO IMPROVE FIT IS VALUABLE WHEN SCALING

- Adaptation of programs will occur in the real world, so it's best to ***plan for the required flexibility*** (Carroll et al., 2007)

- In some cases, successful program implementation requires ***adaptation to local circumstances*** (Backer, 2002)

- ***Cultural program adaptations*** can have a positive impact on site recruitment and retention (Castro, F.G., Barrera, M., and Martinez, C.R. 2004)

- Flexible innovations have a ***more rapid rate of adoption and can fit to a broader range of site conditions*** (Rogers, 2003)

- Adaptation is ***vital for community ownership and can lead to a higher degree of sustainability*** (Goodman & Steckler, 1989)

STRATEGY #4: PLAN FOR SUSTAINABILITY FROM DAY ONE

Grantees lessons:

• Integrate predictable and significant sources of funding

• After scaling up, adjust implementation support

MEETING YOUR GOALS

Conduct a <u>pre-mortem</u> to increase your likelihood of meeting your scaling up and sustainability goals

- We are not good at prediction (e.g., baby births on due date, weather forecasting)

- But a premortem can help:

    "Research conducted in 1989 by Deborah J. Mitchell, of the Wharton School; Jay Russo, of Cornell; and Nancy Pennington, of the University of Colorado, found that prospective hindsight — imagining that an event has already occurred — ***increases the ability to correctly identify reasons for future outcomes by 30%.***"

ANTICIPATE CHALLENGES

Using the Padlet link in the chat:

Imagine…what if everything went wrong?

What challenges resonate with you right now?

NEXT STEPS

- **Explore the tools further (will be shared with recording)**
  - i3/EIR Scale Up & Sustainability Rubric
  - Education Scalability Checklist (ESC)
  - EIR papers (Lessons Learned & Fidelity and Fit)

- **Pre-work for Module #2: Using the concepts discussed today, reflection on the following questions**
  - What are your two areas of strength for scaling up and sustainability?
  - Where is there opportunity to increase the likelihood of scaling up and sustaining your project?
  - How do you maintain equity-focused growth?

- **Register for Module #2 - Leveraging the EIR Knowledge Base**
  - Ideation
  - Logic Modules & Performance Measures

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/
  - User Name: eirta@anlar.com
  - Password: resources4EIR

- EIR Sustainability and Scaling Community of Practice (CoP) and other CoPs- EIRTA@anlar.com

THANK YOU!