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Success at the Core: **How Teams and Teachers Transform Instruction**

Results of a Sustainability Study in Washington State

**Prepared by Inverness Research
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Success at the Core (SaC) is a web-based suite of materials, or a “toolkit,” designed for middle schools to use to advocate for and to practice high quality classroom instruction.¹ Education Development Center (EDC) commissioned Inverness Research² to conduct an independent formative evaluation of *SaC* in Washington State middle schools. The study involved 11 middle schools and one district.³ A Sustainability Study took place during the fall of 2010 as a followup to the pilot. Its aim was to ascertain the extent to which, and the ways in which, usage of *SaC* continued in the pilot sites beyond the pilot year. These questions served as the focus for the study:

- Do the teams and individuals who piloted *SaC* materials continue to use them the following year?
- Does usage of *SaC* extend beyond the teams and individuals involved in the pilot?
- What factors support continued or extended usage?
- What factors prevent or diminish continued or extended usage?
- What are the lessons learned from this study and their implication?

¹ *Success at the Core* was developed by Vulcan Productions in partnership with Education Development Center (EDC) and Woody Creek Productions.

² Inverness Research is an independent national education evaluation and research group. See <http://www.inverness-research.org>.

³ See the results of the pilot study at <http://www.successatthecore.com/artifacts/ExecutiveSummaryOfPilotResults.pdf>.

Study Design

The Sustainability Study had a naturalistic design, meaning that we studied whether usage continued entirely at the volition of the users with no external prompting. The *SaC* developers and we wanted to know if pilot users would be motivated and able, on their own, to continue use. We did not notify pilot school users about the study before the year began. Rather, we simply contacted all pilot users in October of 2010 and asked to talk with them about whether they were still using *SaC* this year. We did not want to bias users by establishing a study that would “expect” continued use. We designed the study this way because *SaC* is designed and intended to function as a fully user-directed tool and resource.

Data collection involved telephone interviews in October, November, and December 2010. Interviewees included the principal, the pilot facilitator of the Leadership Development (LD) Modules (when different from the principal), and the teacher who piloted the Teacher Development (TD) Strategies⁴, as well as new *SaC* users that any pilot users had encouraged. When interviewees told us they were using or planned to use *SaC*, we followed up with in-depth interviews to address our research questions. When interviewees did not respond to multiple efforts to contact them, or told us there was no *SaC* usage and no plans for use, we counted that as non-continued use and did not follow up.

Results

DO THE TEAMS AND INDIVIDUALS WHO PILOTTED *SaC* MATERIALS CONTINUE TO USE THEM THE FOLLOWING YEAR?

At the conclusion of the pilot year, 2009-10, nearly all *SaC* users reported that they planned to continue using *SaC* in 2010-11. We found in this study that, overall, the extent of continued usage was substantially less than what users had intended. At five of the twelve pilot sites there was continued usage of *SaC*. At seven schools there was no continued usage.

Continued usage at five sites: The extent of continued usage varied greatly. At two schools, the former teacher-pilotters (and only they) were continuing to use the TD strategy(ies) they had piloted in 2009-10, having embedded them into their repertoires. At two other schools, building administrators used videos from TD strategies early in the year to focus discussion at staff meetings on current priorities for instructional improvement and to continue fostering development of professional community.

At the fifth school, continued usage was more intensive. The LD facilitator from the pilot year—a teacher who is strongly committed to use of *SaC* in her roles as a coach and building leadership team member—facilitated an LD module with the full school staff of 40 faculty and developed materials enabling teachers to put the module ideas into practice. Also, she has shared two TD strategies with

⁴ Five of the twelve pilot schools are participating concurrently in the *SaC* Impact Study, which focuses on impact of *SaC* use on teaching and learning. The pilot teachers in these schools, who are key participants in the Impact Study, were not included in the Sustainability Study because their continued use is prompted and supported by the Impact Study.

a teacher with whom she works as a literacy coach, and has communicated with district coaches and administrators about *SaC* and sent them the link to the site.

Seven schools where usage did not continue: In two schools where usage did not continue, the pilot experience did not take hold strongly, in one case because the users found *SaC* of modest value and in the other the pilot only involved one person. Here the expectations for continued use were low.

In five schools, other priorities and programs taken up at the beginning of the school year have had the effect of sweeping *SaC* off the radar screen and out of use. The circumstances vary somewhat. At two of the schools, facilitators of the LD modules say they are overwhelmed with new program implementation now, but still hold out hope that they can fit *SaC* usage into their work later in the year. At two other schools, new programs as well as changes in principalship have effectively removed *SaC* from the list of high-profile resources to be used to serve the improvement agendas. Finally, at the other school, the staff believes that they got the most out of the *SaC* LD modules last year and do not need them any more.

Interestingly, two principals reported that while they are no longer using the LD modules, they are still drawing from the skills and values they gained from them. One said, “We will tap into skills from the modules but I don’t think it’s worthwhile to go through them again.” The other principal said, “[The LD modules] continue to help me personally in thinking about what I need to do with my leadership team.” He added that using the LD modules helped promote growth of the whole leadership team that extends into this year, including promoting dialogue and collective decision-making, a significant development in this school culture.

DOES USAGE OF *SaC* EXTEND BEYOND THE TEAMS AND INDIVIDUALS INVOLVED IN THE PILOT?

We learned of four instances in which *SaC* usage extended beyond the pilot schools. In one case a pilot facilitator “carried” *SaC* with her to a new workplace; in the others, piloters spread *SaC* to colleagues in other schools or districts through word of mouth. These accounts of usage are especially valuable for the study because they reflect uses that were not rooted in the pilot study, but rather arose naturalistically from users’ self-direction. As such, the accounts speak to the quality and robustness of *SaC* as a tool that is relevant, usable, flexible, and valuable in a wide range of contexts.

Accounts of extended usage: For one pilot LD facilitator, *SaC* has become a core resource in her leadership repertoire. A veteran math coach with many professional contacts, she describes *SaC* as “a powerful tool for me as a professional,” and she has promoted the use of *SaC* to many people following her experience as a piloter. Since moving to a new district as a math coach in fall 2010, she has used *SaC* materials to model best practices with novice teachers; to create data cards for each math student targeted for extra math assistance; and to model best practices for the teachers she coaches. Later in the year she will use an LD module with a content department adopting a new curriculum. Additionally, she has introduced the materials to district staff and also to a colleague who is a supervisor of intern teachers at a local college.

The supervisor of intern teachers immediately began using *SaC* TD videos to illustrate effective teaching practices and *SaC* lesson plans to model lesson planning. She said, “The fact that it is a visual representation of a real life teacher showing what I’m trying to convey instead of having (interns) read about it is very meaningful ... I have one website where I know I can go to find quality examples of best practice teaching.”

In a third case of extended usage, a junior high school principal heard about *SaC* by word of mouth from a middle school principal who piloted the materials. The jr. high principal says that the *SaC* materials are “the best embedded professional development materials I have ever found,” due to the quality of the videos and the quantity and quality of the support materials. She has used TD strategies at staff meetings to provide concrete illustrations of the principles of the *Five Dimensions of Learning* approach their school has adopted. She also invites teams of teachers to choose from TD strategies and then use a Lesson Study approach to collaboratively develop, test, and reflect on lessons. Thus she is using *SaC* to help her staff actualize their own agenda for improvement.

The fourth case is of potential, not yet realized, usage. While less dramatic than the others, it is nonetheless significant in terms of lessons learned about the usability of *SaC*. A principal on special assignment for his district was introduced to *SaC* by another principal who had piloted *SaC*. He believes the materials “are a great resource” that is “really well designed” and uses “an adult learning model” well. However, by mid-year he had not been able to put the materials to use for the district in ways that he would like. He says, “The question that we keep coming back to is, how do we leverage this without it feeling like one more initiative? ... We're just trying to figure out what makes sense given our context.” This principal recognizes the potential of *SaC* to serve his district, but figuring out exactly how to use it so that it meshes with and supports the district agenda has been a stumbling block.

WHAT FACTORS SUPPORT CONTINUED OR EXTENDED USAGE?

We have identified several contributors to continued and extended usage of *SaC*:

- A *SaC* user becoming a “champion” of *SaC*. Some enthusiastic *SaC* users become continuing users, putting the materials to work in multiple work contexts. They also become “nodes” of information about *SaC*, spreading word of its value throughout their professional relationships, both formal and informal. These champions sometimes function as coaches or explainers, providing colleagues with ideas about how to use the materials.
- Potential users investing time and attention in becoming deeply familiar with *SaC* website and materials. *SaC* is a very user-friendly set of materials; after an hour, some administrators and teachers can locate and decide how to use a video in a simple context. However, the set of materials is also very rich and plentiful. In the absence of deeper familiarity with the materials, which takes more than an hour, there is a “ceiling effect” on more strategic and in-depth use. Just as a person new to Excel can learn to create a spreadsheet very quickly, getting the most out of that application—using it effectively for multiple purposes—requires more time and familiarity with it as a tool.
- Having the capacity to “engineer” how to use *SaC* as a tool. *SaC* modules and strategies can readily support enactment of many kinds of instructional improvement programs and user-identified goals. However, users do need to design ways to make the tool fit together with existing priorities and programs so that, like any tool, it can accomplish what it is intended to accomplish in a particular context. Users vary in their capacity to do this on their own; also, contexts for use vary in their complexity. Thus, sometimes users need some support to engineer use.

WHAT FACTORS PREVENT OR DIMINISH CONTINUED OR EXTENDED USAGE?

An important overall finding from this study is that there was significant “drop-off” in use following the pilot. This study surfaced several contributors to the drop-off effect:

- *SaC* materials lost visibility and urgency between the pilot year and the following year. This happened for a few reasons. First, the conditions of *SaC* use for the pilot study involved pre-arrangements and incentives, whereas the conditions of continued use the following year were naturalistic, that is, with no agreements. As the demands of the new year took up users’ attention and time, *SaC* lost visibility. Some pilot users experienced what we called an “eyes bigger than stomach” effect, where they believed they would use *SaC* the following year and had plans for use, but when the new year’s pressures and priorities came around, they found themselves too busy to fulfill their ambitious intentions. Also, some users experienced what we called a “falling in love” effect, where the enthusiasm of using *SaC* as an appealing new tool wore off as the realities and demands of the new year ensued. Some users felt they had “done” *SaC* and had moved on.
- Other reform programs functioned as competitors to *SaC*, crowding it off the agenda. Several schools reported that new district, state, or federal programs—sometimes several at once—were launching this year and that they were taking precedence over *SaC*. *SaC* thus lost its place as the *au courant* reform focus amid the annual cycle of new program implementation.

WHAT ARE THE LESSONS LEARNED FROM THIS STUDY?

These results reveal that many pilot users were conceptualizing *SaC* more as a *program* that is implemented and then finished, and less as a *toolkit* applicable to a wide range of improvement efforts. That is, we believe pilot users brought a powerful mental model of program implementation to their usage of *SaC*, and that usage of *SaC* in the pilot context did not alter that mental model. Thus, the identity of *SaC* as a program, rather than as a flexible tool, inhibited continuing usage.

While the mental model of *SaC*-as-program exists for many of the pilot users, it does not apply to all. The few users who became “champions” conceive of *SaC* as a *robust and flexible tool* that they can apply to multiple contexts where instructional improvement is the focus—including classrooms, coaching sessions, content teams, leadership teams, staff meetings, novice teacher development, district principals groups, and teacher intern support.

The study affirms that *SaC* is a high quality, relevant, and flexible tool that can enable users to enact their own visions and goals for reform. The study also shows that there are some limits to usage. The implications of these results for the developers of *SaC* are:

- To educate the broad market about the nature of *SaC*. Developers of *SaC* will want to continue educating users and potential users about the nature of *SaC* as a toolkit that can be used over time and in multiple contexts, not a program that is done once and finished.
- To develop materials to highlight relevance and to assist engineering of use. Developers of *SaC* will want to develop additional guides and materials that help users see how the materials can be combined and engineered so as to address important goals and themes in instructional

improvement. Identifying *SaC* “champions” and tapping their experiences will contribute to this development.

- To market *SaC* to educators at all levels who are potential high-impact users and champions. Users who are currently championing *SaC* are educational leaders who have multiple contacts and work toward instructional improvement in multiple contexts. Targeting the “niche market” of such leaders will enhance the potential of *SaC* to be used strategically in multiple contexts and to be spread through formal roles and informal networks.