

**External Evaluation of the OMS Professional Development Leader (PDL) Program:
Mid-Year Progress Report**

A Report for the CPS Office of Math and Science and the Department of Program Evaluation
Prepared by the PRAIRIE Group, UIC College of Education

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¹ Authors produced this report collaboratively and share responsibility for its contents. The conclusions drawn in this report reflect the viewpoints of the authors. While there are many potential viewpoints, these reflect a systematic analysis of data by external evaluators. The hope is that these findings can facilitate improvement of this and related programs through open discussion and consideration of data-driven understandings. For further information, contact Janise Hurtig, jhurtig@uic.edu, 312-413-3367 or Keith M. Sturges, keithmsturges@yahoo.com, 512-626-2454.

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EXECUTIVE SUMMARY

Program and Report Overview The PRAIRIE Group’s second year of external evaluation work with the CPS Office of Math and Science’s Professional Development Leaders (PDL) program combines technical support in program development with external evaluation of the PDL program. Section A of this report describes progress made through “developmental evaluation” work around the PDL program’s logic model and Blueprints for Math and Science. Section B addresses key program areas of short- and long-term goals, program implementation focusing on recruitment, standardization across Math and Science, role development, and program sustainability.

Section A: Program Design and Development PRAIRIE evaluators met with PDL program planners to develop a logic model for the PDL program and revise the PDL Program “blueprints” for Math and Science. This work aims to make explicit the logic of the program, identify key program activities and outcomes as well as mechanisms for assessing progress toward outcomes; increase consistency in expectations for the PDL role across Math and Science, improve mechanisms for monitoring PDLs’ completion of role expectations. A working version of the PDL Program Logic Model and a template for revising the PDL Blueprints are included in the report.

Section B: PDL Program External Evaluation

Methodology: Findings and analysis are based on notes from meetings and technical support sessions with lead PDL program planners, as well as interviews conducted to date with six program stakeholders. Data were reviewed and organized in light of key program areas, then analyzed in relation to themes of program logic, coherence, feasibility, and successes and challenges making progress toward identified goals.

Findings and Analysis

a. Program long-term and short-term goals: Stakeholders consistently enhanced last year’s articulated of the program’s long-term goal, specifying the importance of *sustaining* a pool of *high-quality* PDLs who provide locally contextualized PD. Short- and mid-term goals include: increasing number of recruits; further standardization across Math and Science; improved retention of PDLs; increasing supports for PDLs; improving program monitoring and assessment processes; increasing PDL program’s autonomy from universities and vendors. Progress toward most goals was identified, with major challenges being limits on time and personnel resources.

b. Recruitment of PDLs: Stakeholders identified the following areas of improvement in recruitment: 1) effort was made to target District Areas and schools previously underrepresented in the PDL program and to fill needs across curricula and grade levels; 2) recruitment process was standardized across Math and Science; 3) PDL applications were more systematically scrutinized than last year. An area of challenge was that facilitators were unable to uniformly screen all potential PDLA invitees; for instance, not all invitees were observed teaching in their classrooms.

c. Program roles and supports: Stakeholders defined the PDL role this year in terms comparable to last year. Notable is an expansion of “leadership,” in particular for experienced PDLs who are being offered more opportunities to participate in Academy planning, presentation, and support of new PDLs. Roles of PDLs, facilitators, and program planners are interactive. As experienced PDLs take on broader leadership roles, facilitators are freed up to move into new leadership roles around program planning and PDL support. Program planners have redefined their role from being the primary program planners to being leaders of a team of facilitators, further supporting facilitators’ participation in planning the PDL Academy and PD provision.

d. Standardization of the PDL program across Math and Science: Stakeholders concurred in broad importance of standardizing the program’s key activities while recognizing areas that resist standardization, in most cases related to differences in Math and Science program content structure (e.g. grade levels versus kits). Since last year, both Math and Science have moved toward standardization by borrowing from each other. For instance, Math has increased direct focus on adult learning during their Academy, following Science’s model; and Science has increased the experienced PDLs’ role as a mentor of newer PDLs, following Math’s model.

e. Sustainability of the PDL program: focus on retention of PDLs: The PDL facilitators’ role as program capacity builders is key to program sustainability. For most stakeholders, the program’s sustainability is based in the retention of active PDLs. To address this, stakeholders sought to develop a sense of PDL community, offer differentiated PD, raise the prestige of the PDL program, and assess programmatic issues with PDL input. Stakeholders believed that turnover is affected by OMS’ drawing from the same pool of teacher leaders for PDL and other district needs, and the tendency for teacher leaders to take on numerous leadership roles.

PROGRAM AND REPORT OVERVIEW

The UIC PRAIRIE Group serves as an external evaluator for the CPS Professional Development Leaders (PDL) program for the 2008-09 school year.² The broad goal of the PDL program is to develop and sustain a pool of qualified teacher leaders who can provide leadership in the Chicago Public Schools in mathematics and science and provide high-quality, district-wide, in-context professional development for the instructional materials supported by the Chicago Math and Science Initiative (CMSI).

This is the second year in which PRAIRIE Group has served as external evaluator of the PDL program, with the aim of providing the PDL Planning Team, OMS Math and Science Managers, the OMS Director, and other key stakeholders with in-depth, nuanced, and timely feedback regarding both the overall framework and specific facets of the PDL program. Key program areas addressed by this year's evaluation include:

1. PDL program development and implementation, including internal monitoring and assessment
2. Standardization of the PDL role and program across Math and Science
3. Role development of PDLs and PDL program planners
4. Quality of PDL training and supports
5. Sustainability of the PDL program

This year's evaluation work combines technical support in program development -- often referred to as "program theory" or "developmental" evaluation -- with external evaluation of the PDL Academy and district-wide professional development delivery by PDLs. The integration of these two kinds of formative evaluation is particularly suited to work with an emerging program or initiative that is engaged in a deliberate process of reflecting on, modifying, and enhancing its logical framework in relation to its processes and intended outcomes, as is the case with the OMS's PDL program.³

This progress report is divided into two sections that mirror the two kinds of evaluation work. Section A, "Program Design and Development," reports on progress made through the "developmental evaluation" work around the PDL program's logic model and PDL program Blueprints for Math and Science. Section B, "Program External Evaluation," addresses those aspects of the five key program areas listed above for which program materials and evaluation data are currently available. (Two key program activities, the PDL Academy and summer professional development, had not yet taken place at the time this report was compiled.)

² This evaluation of the PDL program represents one part of a series of external evaluation studies conducted over the 2008-09 school year by the PRAIRIE group in order to examine the systemic educational reform underway as part of the Chicago Math and Science Initiative (CMSI) supported by the CPS Office of Math and Science (OMS). The aim of these studies is to provide OMS and other key stakeholders with a deep, nuanced understanding of the processes and outcomes of the CMSI. These evaluation studies are based on rigorous data collection and analysis that are conducted in such a way as to provide timely and useful feedback to the audiences including the leadership team of the Office of Math and Science (OMS), the Chief Educational Officer of CPS, and the CPS Department of Program Evaluation, as decisions are made about the allocation of resources in the effort to continually improve math and science teaching and learning.

³ For a discussion of developmental evaluation, see Michael Quinn Patton, *Utilization-Focused Evaluation: the New Century Text*, Third Edition (Sage Publications), 1996. For discussion of program theory evaluation, see the *New Directions in Evaluation* "Special Issue: Program Theory in Evaluation: Challenges and Opportunities," Patricia J. Rogers, et al. eds. 2000.

This progress report also serves as a *partially completed draft* of a Comprehensive Annual Report that will be delivered to OMS and the Department of Program Evaluation at the end of this program year (August 2009). A proposed outline for the comprehensive report, subject to modification pending review by the OMS and DoPE, is attached to this report as Appendix A. The organization of the progress report is based on that outline. However, the reader will note that several subsections intended for the comprehensive report are not included in the progress report, as they address either components of the program development work that have not been completed, or facets of the PDL program that have not yet taken place or been evaluated.

SECTION A: PROGRAM DESIGN AND DEVELOPMENT

A.1. PDL Program Templates

Since December 2008, PRAIRIE evaluators have had four working meetings with the PDL planning team toward the goal of producing a series of program planning materials: a program logic model, revised PDL Blueprints, and PDL program tools for internal assessment, reflection, and evaluation. The purpose of the first meeting was to review and discuss the final evaluation report of October 2008, in light of program planning for the 2008-09 program year. This meeting was attended by six Math facilitators and one Science facilitator involved in PDL program planning, as well as the OMS Math and Science managers.

Subsequent to the initial meeting, PRAIRIE evaluators have held three technical support sessions with the leads on the PDL planning team – two Math facilitators and one Science facilitator. The purpose of these sessions is for the PRAIRIE evaluators to provide frameworks, facilitate discussion, and support the program planners in the development of a logic model for the PDL program, as well as the refinement and standardization of the Professional Development Leaders Blueprints for Math and Science. Subsequent technical support sessions will continue this work toward the goal of completing a PDL program logic model and providing feedback in the development of tools and processes for internal documentation and assessment of the PDL program.

This section focuses on progress made to date by the PDL planning team, in collaboration with the external evaluators, in the development of a program logic model and the revision of the PDL program Math and Science Blueprints. The first document provides a diagrammatic representation of the PDL program's theory of change integrated with its implementation and assessment plan. The second document serves as a planning map for prospective PDLs, laying out the criteria for becoming certified as a PDL.⁴ Subsection A.2.a. includes a summary description of the logic modeling process and an overview of the content of the logic model, followed by a “working version” of the PDL program logic model with shorthand versions of the content included. Subsection A.2.b. provides a summary of discussions with program planners that led to the decision to revise the PDL program Blueprints, and includes a template of the current blueprint document. Final, completed versions of these two key PDL program documents will be included in the Comprehensive Annual Report. The program logic model will be complemented by a series of logic model “worksheets” that contain elaborated statements for each of the logic model cells.

A.1.a. Development of a PDL Program Logic Model

Logic Modeling. Logic modeling can be summarized as a way of making *explicit* what is often *implicit* about a program: what the desired outcomes are, what key activities are being implemented to lead to

⁴ Actually, at the time of this report the precise purpose of the Blueprints was being discussed by PDL planners and their teams – as is discussed in subsection A.1.b. below.

those outcomes, why it is expected that the program's key activities will lead to those outcomes, and how the program takes into consideration the external factors that facilitate or constrain its implementation. Logic models are also useful in helping program planners identify the assumptions or rationales that guide their program's logic, and to detect areas where there might be gaps or leaps in logic.

Logic models can be used to represent programs to varying degrees of abstraction or specificity. Minimally elaborated logic models can serve as diagrams of a program's theory of change, and are often created at the planning stages of a program or initiative. More detailed logic model diagrams that incorporate key activities, a sequence of short to long-term outcomes (an "outcome chain"), and even feedback loops incorporating monitoring and assessment practices, are more useful for program planners who are developing, implementing, and/or overseeing a program that is already in place. The kind of logic model that best serves a program can also change over time. Logic models are often described as "living documents" that should be modified as a program develops, adapting to changes in short-term goals, key activities, and the program development needs of planners.

The PDL Program Logic Model. The PDL Program Logic Model presented below is the result of an iterative dialogue between the PDL program planners and the evaluators. In an initial working session, the evaluators provided the planners with a barebones logic model template of Program Goals, Key Activities, and Desired Outcomes. That first logic model template also indicated a process of documentation and assessment of activities and outcomes, in order to include the diagramming of a feedback loop that would inform the program's implementation and theory of change. During that session, the evaluators solicited input from the planners regarding key components of the program's logic. Because the program planners were in the throes of recruiting teachers to the PDL Academy at the time, the discussion focused primarily on that key activity, i.e. *recruitment*. In the process, it became clear that decisions about how recruitment was proceeding responded to certain *external factors*: contexts and conditions beyond the confines of the program, and the availability of resources. At a more conceptual level, recruitment decisions were related to broader rationales or assumptions that guided the program planners' their thinking about how PDL program activities, if carried out as intended, would lead to the desired results.

In the second working session, the evaluators provided the planning team with a revised logic model template for the program that incorporated these various elements of the program's logic. This logic model (included below) is designed to represent key programmatic components of the PDL program, as well as the key external factors that the PDL planners (and OMS more generally) take into account in planning and implementing the PDL program. The current logic model also represents the evaluators' understanding that, while the PDL program has historically consisted of three key activities (recruitment, the PDL Academy, and PD provision), the various new or planned activities aimed at the *retention* of PDLs constitutes a kind of key activity in its own right.

In addition, extensive discussion around the recruitment process made it clear that there were specific desired outcomes for recruitment, and for each of the other key activities. Moreover, each activity is, or will be, assessed in distinct ways. Finally, while the outcomes of each key PDL program activity are expected to influence the activities and outcomes of the next activity given that they occur sequentially over the course of the program year (for instance, recruitment outcomes affect the PDL Academy, the outcomes of which affect PD provision), there are also ways in which each key activity is meant to contribute directly to the desired short-term goals for the program. *The logic model in its current form aims to represent this understanding of the programmatic logic and implementation processes of the PDL program.*

Below is a working version of the logic model, with summary statements for those cells for which we have adequate data at this point. (Incomplete cells are indicated as such.) The content of the cells draws

on discussion with program planners as well as on the content of five stakeholder interviews conducted to date. The content of these cells provides a summary of much more elaborate statements of activity and outcome. The purpose of these statements is to provide a “snapshot” of the program in a way that captures its underlying logic, or theory of change, in relation to plans for implementation and assessment. As mentioned earlier, the evaluators are working with program planners to complete more fully elaborated statements for each of the model cells. These worksheets include statements of key activities and outcomes that are observable or measurable, realistic, and time-related,⁵ so that the logic model can contribute to the development of effective internal and external program evaluation.

⁵ Such statements are often referred to in the program development and evaluation literature as “SMART” objectives.

PDL Program Logic, Planning and Evaluation Template

Statement of Problem or Need: Need for ongoing, high-quality professional development in CMSI-supported materials to a growing number of teachers in the District with limited personnel and monetary resources. Problem of supporting effective teachers in math and science to become and remain teacher leaders.

Contexts and Conditions

Guiding Rationales/Assumptions:

1. Effective/strong teachers from CPS schools can be effective trainers of teachers. (But not all good teachers are good teacher educators)
2. The skills and dispositions for teaching children differ in some ways from those for teaching adults.
3. The more localized the PD, the more effective it is.
4. Leadership qualities important for a PDL include self-confidence; desire to push selves, self-reflect, be open to learning

External Factors: Increased number of schools using CMSI curricula; budget cuts; competing demands on experienced/effective teachers; decentralized decision-making in district (curricula not mandated); District bureaucracy; restrictions on teachers' time out of classroom,

Resources: OMS personnel for recruitment, PDL Academy, PD provision (in particular facilitators); funds; time; space for PDL Academy and PD provision; curricular materials

Key Program Components

Recruitment

Planned Activities: solicit recommendations from Area coaches, facilitators, CWS's, others; observe T's; send letters of invitation to apply; review applications; select prospective PDLs

Documentation of Actual Activities: completed application materials; completed screening matrices; recruit input into process

Desired Recruitment Outcomes: Meet target #s for Academes; better distribution of recruits across district; recruits meet program area needs; high% of recruits complete PDL Academy; recruits understand PDL program and PDL role.

Evidence of actual outcomes: # of prospective PDLs accepted into Academies; accepted PDLs fill scheduling, area, content, grade level, experience level, etc. needs; exit survey and informal feedback to PDL planners/facilitators.

PDL Academy (to be completed)

Planned Activities: preparation for the Academy: logistics, speakers, resources; tools; develop activities to support standards-based teaching practice; Academy participants produce action plans

Documentation of Actual Activities: internal and external evaluation;

Desired Academy outcomes: greater understanding of pedagogy, content, adult learning; increased leadership skills;

Evidence of actual outcomes: outcome assessments to be developed; feasibility of action plan rubric

PD Provision (to be completed)

Planned Activities: new and experienced PDLs co-plan and provide (or observe), and co-reflect on summer and year-long PD

Documentation of Actual Activities

Desired PD Provision outcomes: teachers receive high-quality PD; PDLs improve their teaching and leadership skills;

Evidence of actual outcomes

PDL Retention (to be completed)

Planned Activities

Documentation of Actual Activities

Desired Retention outcomes

Evidence of actual outcomes

Short-Term Program Goals for Current Program Year: Increase number of PDLs district wide; have better distribution of PDLs by Area; improve retention of existing experienced PDLs; increase professional learning opportunities (supports) for PDLs and PDL planners; increase provision of area-based PD, with PDLs providing PD in their own Areas; improve/formalize internal monitoring and assessment processes, including tracking of PDLs as they move through the program

Long-term Program Goal: To develop and sustain a cadre of qualified teacher leaders who provide high-quality mathematics and science leadership in the Chicago Public Schools, facilitate district-wide (and Area-based), in-context, CMSI professional development, and support coherence in standards-based math/science education across the District...

A.1.b. PDL Program Blueprints

During the 2007-08 program year, Math and Science PDL program planners worked on standardizing the documents they had been using to lay out the criteria for completion of the PDL program, referred to as the PDL Program Blueprints or the “Professional Development Leadership Plan.” Efforts at standardization focused on the modification of document name and column headings to best reflect the content of the columns and create consistency across Math and Science. (As was described in last year’s Final Evaluation Report,⁶ there are differences in the number of goals, the minimum hours required to complete certain goals, as well as sample activities for and evidence of completion of the goals.) As discussed later in this report (Section B), those differences will be revisited by the PDL planners in the future and decisions will be made as to whether they should be reconciled or remain as they are.

Despite some differences in the content of the Math and Science PDL Blueprints, both Math and Science planners agreed that modifications were needed in order to produce a document that was more logical and more useful as a means of monitoring participating teachers’ progress toward becoming PDLs. In this subsection we describe steps taken toward the refinement of the Math and Science PDL Blueprints during the technical support sessions, and present a model of the “working version” of the PDL Math and Science Blueprints.

During the first meeting with OMS facilitators and managers, discussion around the distinction between PDLs being *expected* to provide district wide professional development, and being *prepared* or *qualified* to provide Area level professional development, led to the group’s recognition that it would be important to be able to determine whether a certified PDL did in fact have such qualifications. The group’s review of the 2007-08 evaluation report’s analysis of the blueprints led them to further identify that it was not possible to determine whether the PDL recruit had accomplished the stipulated learning goals simply by completion of activities and minimal hourly requirements. Clear indicators of successful completion of goals were needed. This realization led to the decision to modify the PDL Math and Science Blueprints such that they provided a logical mapping of the process from goals to sample activities to kinds of evidence of completion of activities, to indicators of accomplishment of goals.

At the first technical support session, further discussion of the content of the Blueprints led to consensus among participants that the PRAIRIE evaluators would provide a modified template for the Blueprint, adding an additional column for “indicators,” and then provide the PDL Planners with suggestions or questions prompting thinking around how the content of the Blueprint might be modified to increase its logical coherence and usefulness as a kind of rubric for tracking and assessing PDL recruits’ progress in meeting the Blueprint goals.

At the third technical support session the evaluators reviewed the suggested modifications with the PDL program planners, including the additional column for indicators of successful accomplishment of goals. The group then began to discuss the meaning and content of each of the columns, beginning with the goals. Discussion of the wording for PDL goals focused on two different issues: (1) whether goals could be a combination of activity completion goals and learning outcome goals, as they are now; and (2) whether the goals should describe what the PDLs should accomplish in order to be certified, or describe areas of their ongoing growth and development from new to experienced PDLs. The second issue led to the realization on the part of the planners that there were different views as to the purpose or significance of the Blueprint: was it meant to represent guidelines for becoming certified as a PDL, or was it meant to provide a template for the ongoing professional trajectory of PDLs? The PDL program planners decided

⁶ “External Evaluation of the OMS Professional Development Leaders Program, 2007-08,” October 24, 2008.

to take this question back to their respective teams and managers, and development of the Blueprints was put on hold until the question of the purpose of the Blueprints was resolved.

The Table below, which contains text relating to Goal 1 of the Science PDL Blueprint or Plan, is the first page of a worksheet PRAIRIE evaluators developed to work with the PDL program planners to support their modification of the PDL Blueprints. It is expected that the PDL program planners and PRAIRIE evaluators will return to these worksheets during subsequent technical support sessions.

**Chicago Math & Science Initiative Professional Development Leadership Plan
Science Side**

GOAL 1 Worksheet

	Goal	Minimum Time Requirement	Sample Activities	Sources of Evidence	Indicators of Successful Accomplishment of Goal
ORIGINAL TEXT	Professional development leader demonstrates standards based teaching practices.	6 hours	<ol style="list-style-type: none"> 1. Classroom observation 2. Grade-level discussions 3. Area collaboration** 	<ol style="list-style-type: none"> 1. Student work and reflection about science lessons. 2. Observation with use of the Classroom Observation Guide 3. Agendas from grade level discussions around specific science lesson, student learning and teaching strategies 	<p>Classroom observations and student work reveal PDLs demonstrate standards-based teaching practices.</p> <p>Grade-level agendas consistently relate lesson to selected strategies</p>
PRAIRIE FEEDBACK	Is this measured using the COG?		<ol style="list-style-type: none"> 1. Does this refer to an OMS facilitator observing the PDL teach? Or the PDL observing other teachers? 2. Are these discussions the PDL leads or participates in? 3. What might this look like or consist of? 	<ol style="list-style-type: none"> 1. How is this student work being checked? Through observation? Or a separate process? By whom? Is there a rubric? 3. Is there a rubric for assessing the agendas? Is the agenda adequate or should the meeting be observed? <p>**What is evidence for area collaboration?</p>	Above indicators would have to be modified if the sources of evidence change, or if the demonstration of standards-based teaching practices is made more specific.
REVISED TEXT	(to be completed)		(to be completed)	(to be completed)	(to be completed)

Reflection Questions for Developmental Evaluation

- The emphasis of the PDL program goal statement as currently articulated emphasizes ongoing processes of development and sustainability. Should this goal statement be modified such that more explicitly identifies changes in capacity or conditions that are expected to result from developing and sustaining this cadre of PDLs?
- What kinds of information are needed to determine whether the guiding assumptions or rationales or the PDL program are accurate? (For instance, is information being gathered to determine whether teachers who are experienced users of a curricular program are in fact able to provide better professional development than vendors, by virtue of their familiarity with the district and classroom context?)
- Do all facets of the PDL program's implementation take into account external factors and available resources? Are all intended activities and desired outcomes realistic in light of external contexts and available resources of time, funds, and personnel?
- Given that planners are working with teams of facilitators to plan and implement aspects of the PDL program, should these teams be involved more directly in the developmental evaluation process?

SECTION B: PDL PROGRAM EXTERNAL EVALUATION

This section constitutes the external, formative evaluation of the PDL program. It should be noted that this progress report was compiled prior to key training activities of the PDL program, namely the PDL Academy and summer professional development provision. Moreover, the results of recruitment efforts for the PDL Academies (measured in terms of qualities of participants who enroll in and complete the PDL Academies) were not yet known at the time of preparing the report. Thus, this progress report does not report on this year's program implementation, except for some discussion of recruitment activities. A full discussion of the PDL program's implementation will be addressed in the Comprehensive Annual Report, structured around the five key program areas identified in the introduction to this report. Here we focus on five facets of these key program areas, focusing on those facets of the PDL program that complement the program development and logic modeling processes to date, namely:

- a. PDL program goals: long-term and short-term
- b. Key activities: focus on recruitment efforts for this program year
- c. Program roles and supports: PDLs, facilitators, and PDL program planners
- d. Standardization of the PDL program across Math and Science
- e. Sustainability of the PDL program, with a focus on retention of PDLs

B.1. Methodology

Data Collection and Analysis: The content of this part of the report draws on the knowledge, insights, and suggestions of OMS leaders who are *key stakeholders* in the PDL program. The progress report is based on notes from meetings and technical support sessions with the lead PDL program planners, as well as interviews conducted to date with six program stakeholders: the OMS Director, Math and Science Managers, the two Mathematics Facilitators and Science Facilitator participating as leads on the PDL Planning Team. The final report will include data from interviews with additional stakeholders, as well as observations, interviews, and focus groups from the PDL Academies and summer PD provision.

Records of meeting discussions are based on evaluator notes, including planners' feedback and brainstorming during the logic modeling process. (Interview protocol is attached as Appendix B.) Interviews with key stakeholders were audio-recorded to ensure accuracy. Meeting notes and interviews were then reviewed and organized by the evaluators around the five key areas listed above. Data were then analyzed in relation to themes of program logic (or theory of change), coherence, feasibility, and successes and challenges making progress toward identified goals.

B.2. Findings, Analysis, and Reflection Questions

Findings and analysis are presented for each of the five themes listed above, drawing attention to compelling issues raised by the data in light of the program's logic, goals, and ongoing development. Each subsection is followed by questions for reflection. Findings, analysis, and reflection questions aim to draw attention to issues of program logic, feasibility, coherence, successes and challenges. Because the programmatic themes are often inter-related or overlapping, discussion of one theme may occasionally refer the reader to other themes for comparison.

B.2.a. PDL Program Goals: Long-term and Short-term

Long-term goals for the PDL program. All stakeholders characterized the long-term goal of the PDL program as entailing the development of a pool, or cadre, of teacher leaders who provide district-wide professional development *and* who provide leadership in their schools. This characterization is consistent with PDL program documents and stakeholder comments gathered for last year's (2007-08) evaluation.

That said, when stakeholders elaborated on the program’s long-term goals this year, certain additions to that broad goal began to emerge that it seems are beginning to become intrinsic to the message about the PDL program. In the first place, all stakeholders indicated or acknowledged that the goal was not only to develop, but to *sustain* a pool of teacher who could provide district wide professional development. Secondly, discussion that took place around issues of recruitment of prospective PDLs, as well as the criteria for certifying teachers as PDLs, made clear the importance of ensuring that the professional development provided be of consistently *high quality*. Finally, stakeholders articulated as a programmatic goal the provision of localized, or what one stakeholder described as “*in-context*” professional development: i.e., professional development that addresses and takes place within the specific context of the District, and is provided by teachers who work within that context. The PRAIRIE evaluators have synthesized these additions into a working statement for the program’s long term goal (included in the logic model in Section A), as follows:

To develop and sustain a cadre of qualified teacher leaders who provide high-quality mathematics and science leadership in the Chicago Public Schools, facilitate district-wide (and Area-based), in-context, CMSI professional development, and support coherence in standards-based math/science education across the District.

Short-term goals for the current program year. As with descriptions of the program’s long-term goal, most of the short-term goals stakeholders identified for this year were consistent with last year’s goals. A few additional program goals were introduced that are consistent with changes in the program’s long-term goal. All six stakeholders identified the following short-term goals for this program year: increasing number of teachers recruited into the PDL program; further standardizing the PDL program across math and science; improving the retention of existing (experienced) PDLs; increasing the supports for PDLs – in part as one way of increasing retention . Five also referred to improving the internal processes of monitoring and assessing program progress as a short-term goal. This latter goal refers to a range of specific practices identified by stakeholders, including: tracking participants and their development as they moved through the PDL program; gathering and using reflective feedback from PDLs on their experiences and needs; and engaging facilitators in reflection on the quality of the PDL Academy and PDLs’ provision of professional development.

Some short-term goals were identified by a sub-set of stakeholders. For instance, the program planners identified as a short-term goal for this year and beyond, improving the distribution of PDLs (through recruitment) throughout the district and by Area. The upper management mentioned autonomy of the PDL program from university partners or curriculum vendors as a short-term goal, such that PD provision would increasingly take place in-house. While the stakeholders described these as short-term goals, it might be more appropriate to characterize them as *mid-term* goals, in that it was implied or indicated that the goal “might not fully happen this year, or the next,” but was something the program was working toward.⁷ For instance, in the cases of improved distribution of PDLs across Areas, and increased autonomy of the PDL program, stakeholders noted that progress toward those goals was being made this year, but noted that efforts toward better distribution and program autonomy, respectively, would continue to increase over the next few years.

How well is the PDL program meeting its short-term goals? All stakeholders commented that the program was meeting some short-term goals while facing challenges with others. In terms of successes, several stakeholders noted that an increasing number of new PDL recruits are being identified and are entering the program. This perception of increase is based on enrollment numbers for the PDL Academies, which both Math and Science program planners indicated were up from last year. (Exact numbers of Academy

⁷ From a program logic point of view these would not be considered long-term goals *per se*, as they are goals whose accomplishment would contribute to realizing the long-term goals.

participants were not known at the time of this report; however, planners' estimates suggest an increase of 10-15 percent.) They attributed this success, in part, to relationships that have been fostered and maintained with previous PDLs. (The basis for this success is discussed at greater length in the next section on recruitment.)

Stakeholders also described a range of mechanisms that have been put in place or planned for this year in order to provide experienced PDLs with supports and more leadership opportunities. (These changes and additions are discussed below in the sections on Roles and Sustainability.) Lastly, stakeholders described ways in which Math and Science have modified their Academies and plans for setting up professional development provision in order to create greater consistency, or standardization, across the two sides. (See the section on Standardization for details.)

At the same time, stakeholders identified areas where the program has not been as effective as it would like to be in meeting its short-term goals, generally because of limited resources of time, finances, and/or personnel. Several stakeholders identified challenges they faced in efforts to provide additional supports beyond the Academies and during PD provision. For instance, on the Science side, plans were put in place and funds allocated at the beginning of this program year to support experienced PDLs by organizing a series of quarterly professional learning sessions. However, only two of the meetings were convened, due to a lack of time and personnel resources to adequately prepare for and convene the meetings. Similar challenges were described on the Math side in relation to efforts to engage facilitators in learning communities around their mentoring, supervisory, and management roles.

Coherence and feasibility of goals. The degree of consistency in stakeholders' identification of goals and assessment of progress towards goals is an indication that the program leadership shares an understanding of the program's purpose. Similarly, there is considerable logical coherence between the long-term goal and the short-term goals, suggesting that the program leaders share a clear and concrete plan for the steps that need to be taken in order to move toward the long-term goals. Moreover, the fact that several of this year's short-term goals involve modifications of last year's goals, demonstrates how the program is developing and changing in order to address the evolving long-term goal and broader needs of OMS and the District.

That said, the fact that progress towards goals seems to be regularly challenged by deficiencies in key resources suggests that some of the short-term goals may be unrealistic as currently envisioned and require modification. Potentially, the processes of internal assessment and reflection that are to be put in place as one of the short-term goals will generate information that can contribute to identifying possible modifications to those goals or to the programmatic assumptions on which they are based.

Reflection Questions

- What kinds of resources can be leveraged (time and personnel, for instance) to support the PDL program in addressing challenges it faces in meeting short-term goals?
- How might planners continue to ensure ongoing coherence between long- and short-term goals as programmatic challenges arise?

B.2.b. Key program activities: Focus on recruitment

Recruitment as currently practiced. All stakeholders described a need to expand the pool of PDLs to help in conducting PD sessions OMS offers each year. While no specific distribution numbers were available, stakeholders commented that while the PDL program has been able to recruit PDLs, active PDLs are disproportionately distributed across District areas and schools, curricula, and grade levels (for math) and kits (for science). Some stakeholders related the uneven distribution of PDLs to such factors as uneven

targeting and challenges facilitators have faced attempting to recruit PDLs to fill gaps in particular curricular materials and grade levels. This focus on improving the distribution of PDLs throughout the district has stimulated some effort to target marketing efforts. One of the planners noted that recruitment has been extended to include some areas that have been underrepresented. Furthermore, as described in the Program Goals, stakeholders noted that efforts are underway to develop a database to monitor distribution.

Within this context, stakeholders described a four-stage recruitment process that has taken place this program year. First, prospective PDLs are recruited primarily through the recommendations of citywide specialists and area coaches, as well as through facilitators' recommendations from Level 2 professional development. From these recommendations, *ideally* at least one classroom observation should be made by an OMS facilitator, although stakeholders indicated that this does not always occur, due to limits of time and personnel. They did comment that the purpose of the classroom observation is to "see where they are... we just want to get a sense of their standards-based classroom practices, what is their thinking about student learning, and teaching." After this process of screening, potential recruits are invited to apply, and then applications are reviewed and selected teachers invited to participate in the PDL Academy.

Improvements and challenges to recruitment. Stakeholders described both improvements and challenges at each stage of the recruitment process (recruitment sources, pre-screening observation of prospective invitees, invitation to apply to the PDL program, and the review of PDL applications). Below we present both improvements and challenges stakeholders have identified as occurring with each of these stages.

a. Current marketing sources. At the initial selection stage, stakeholders noted that PDLs are drawn and should continue to be drawn from what one of the interviewees described as a "closed society." While some felt that the application process should eventually be opened to all teachers, all commented that until a method for ensuring the quality of candidates could be adopted, it was necessary to use a closed selection process. As one participant commented, "If it is open then there needs to be a strong filtering or selection process in place—and that's what we don't have." The "closed society" approach taps into citywide specialists and area coach personal-professional networks as the main source for identifying potential new PDLs recruits.

While all stakeholders said that they trust the judgment of citywide specialists and area coaches, a few thought it would be good to experiment with other avenues. As one stakeholder commented, "We are struggling with the fact that there are many good teachers out there that we are missing. So, how do we get to those folks who nobody really knows are doing a great job?"

b. Screening of potential PDL invitees. As noted above, stakeholders indicated that facilitators encountered an increased difficulty in observing all potential PDL recruits. This difficulty is linked to changes in the PDL facilitator roles. As one stakeholder noted, "Because our facilitators' roles have really become project managers, they really don't have time to go out into schools to do site visits." Another commented, "Usually when we get the recommendation from the coaches we don't necessarily go out and do a site visit. If the coach has seen them teach and they are wonderful, we might just invite them to the Academy based just on that." Another stakeholder noted that the change in facilitator role eliminates the connection with the schools and thus awareness about what is going on at the school level or in the classroom. Thus, as a result of the changes in facilitator role, the recruitment process does not always conform to the desired model.

In summary, it appears that the screening of potential PDLs is not always completed uniformly across recruits. Furthermore, facilitators feel somewhat removed from everyday classroom practice. To address this, some stakeholders suggested delegating classroom observations to more experienced PDLs. As discussed in a later report section on PDL Roles, this would also be a way to involve experienced PDLs more directly in the PDL program.

c. Invitation to apply to the PDL program. In response to the recognition that in previous years recruits were not made aware of the various demands of the PDL Academy and professional development on their time, during the current program year a letter was to be sent to prospective recruits describing the process and offering them time to consider their involvement. From that point, responding recruits were sent a more formal application. However, the late start of PDL recruitment disrupted this flow somewhat. According to one stakeholder, delivery of invitations was delayed by efforts to standardize the letter across mathematics and science sides. According to stakeholders, this delay may have affected the goal of giving prospective recruits adequate time to carefully consider whether or not to apply to the PDL program. Now that a standard letter of invitation exists, it is expected that this stage of recruitment will be more effective in communicating program requirements to prospective PDLs.

d. Review of PDL applications. According to stakeholders, the screening process for applications was carried out more systematically during the current year than in the past. A few stakeholders commented that in previous years the review quality of application materials and resumes was not always uniformly applied or adequately rigorous. One noted that in the previous year, “we had people who came to the PDL Academy and after the first day they said this was too much for me—I don’t think I can handle this.” While this situation may have resulted from a lack of clear communication of expectations (a problem identified in relation to the invitation letter), this stakeholder suggested that they might have avoided recruitment of unqualified teachers if there was “something that was on their resume that we could have caught.” Stakeholders commented that in the current year, however, application content was reviewed more closely, in light of the criteria specified in the invitation to apply, including: years of teaching experience, completion of at least new (and ideally also experienced) professional development in the CMSI-supported program they teach, demonstration of strong leadership and communication skills and prior leadership activities, commitment to deepening their content and pedagogical knowledge in math and/or science, and demonstrated ability to communicate well with their peers and support their math and science learning.

Coherence across Math and Science in recruiting efforts. Stakeholders said that recruitment efforts used by Math and Science sides were very similar. This was not coincidental, but rather the result of deliberate efforts by Math and Science PDL planners to standardize the process. As a result, all of the components -- contacts, invitation letters, application, and most of the criteria for application-- are the same. In addition, both sides send reminder letters to coaches at the same time. What is not certain at this point is the degree to which observations of prospective PDLs are similar across Math and Science. Moreover, because a formal rubric for rating applications was not used this year, it is not known whether selection processes were comparable across Math and Science, or even within each side. Discussion during meetings around the desire to further systematize the recruitment process suggests that standardization of the selection process may be a goal for the next program year.

Reflection Questions

- If the current network of coaches, specialists, and PDLs taps primarily into areas, schools, kits and grade levels that are already well-represented, what might OMS do to alter its recruitment plan to fill all the gaps?
- How are program managers considering the future of the program in terms of recruitment, given that the potential pool of recruits could diminish over time?
- What credentials and dispositions should PDL *recruiters* have? How are those credentials and dispositions determined and by whom? Should the selection of recruiters be more formalized, or is the current approach effective?
- How will OMS revise the role of facilitators in the recruitment process as the facilitator role evolves?

- How might OMS measure the quality and effectiveness of current recruitment efforts?
- Is the quality of the PDL program compromised if not all potential recruits are observed and otherwise screened?

B.2.c. Program Roles and Supports: PDLs, Facilitators, and PDL Program Planners

Last year's final evaluation report explored in detail the ways in which PDL program stakeholders – including PDLs – understand program roles and supports for those roles. In this subsection we focus on actual and planned changes in these key PDL program roles and supports, as articulated by stakeholders. (PDLs' and facilitators' perspectives will be explored in more depth in the Comprehensive Annual Report.) Particular attention is paid to the interaction among roles, i.e., how modifications in one role are leading in turn to the reframing of other roles.

The PDL role: continuities and changes. In most ways, the PDL role as articulated by stakeholders this year is comparable to last year. Stakeholders were consistent in viewing the PDL's primary role as that of providing "high quality, district wide professional development for our CMSI designated materials." They also shared an understanding of what it meant for PDLs to be leaders in their schools: namely, that they would support math and science teaching in their schools in general, and support other teachers in their particular area of expertise. One stakeholder characterized PDLs as "champions of math and science in their schools," and pointed out that this did *not* mean that they were expected to be experts in science or math *per se*, or to act as in-school coaches. Indeed, discussion of the PDL role made it clear that their content expertise is generally limited to a particular grade level and curriculum (in Math) or a particular kit (in Science).

Within that broad definition, there are specific ways in which stakeholders this year see the PDL role being enacted that are different from last year. Notably, each of these changes responds to developments, either within the PDL program itself, or within the OMS more broadly. In the first place, as a result of a newly instituted effort within OMS to provide professional development at the Area level, the role of the PDL is being recast as providing professional development both at the district *and* Area levels.

Secondly, in response to the programmatic effort to retain existing PDLs, there is an increasingly systematic effort to *differentiate* the roles of new and experienced PDLs within the program. For instance, both Math and Science are including PDLs as experts during the PDL Academy in different ways: as mentors of new PDLs and as presenters, for instance. A few stakeholders indicated the desire to also include PDLs in planning the next PDL Academy. One stakeholder commented that this lets "experienced PDLs feel like they have more of a leadership role," noting that they are looking to their PDLs to be mentors as well.

A key facet of the PDL role definition is that of leadership. One stakeholder characterized the quality of leadership they look for in prospective PDLs in terms of their "pushing themselves to go further," and more specifically taking on additional roles within their schools or OMS. This notion of leadership seems to inform an evolving understanding of what the PDL role entails beyond PD provision. Where last year there was an emphasis on the fact that PDLs were not, and could not be, expected to take on take on additional tasks beyond the provision of professional development, this year there seemed to be a shift towards the notion that PDLs *could* take on additional activities within OMS, and that these activities be perceived as leadership opportunities, rather than obligations or requirements. Potential activities identified by stakeholders included providing PD to teachers who plan on teaching summer school, conducting benchmark assessments, or helping to recruit prospective PDLs in their Areas.

The facilitator role: continuities and changes. In last year’s final evaluation report, the PRAIRIE evaluators explored the roles of OMS facilitators in the PDL program as either “PDL trainers” or “PDL program planners.” Comments of stakeholders in interviews and meetings this year suggest that both of these roles are undergoing transformations as the PDL program restructures in response to its growth, and in response to the broader redefinition of the facilitator role within OMS. Below we describe how these roles have changed and shifted in relation to each other.

With the exception of PDL planners, facilitators have had, up until now, two primary roles within the PDL program: serving as trainers/supervisors of prospective, new, and experienced PDLs as they develop and improve their skills as professional development providers, and contributing to the recruitment of prospective PDLs. As one stakeholder put it, “being there to support the PDLs, that is our biggest role as facilitators.” This year, facilitators are being involved more extensively in the planning and decision-making around the PDL program.

While the PDL planner role continues to be one of project management, including managing all the logistics of the PDL program but also taking responsibility for improving the program, the current PDL planners have redefined their role from being the primary program planners to being leaders of a team of facilitators. As a result, the facilitators are in a position to participate collectively in the planning the PDL Academy and PD provision. According to stakeholders, the purpose of working in teams is twofold: to communicate more effectively a coherent message about the PDL program to all participants; and to work more effectively in managing the many activities involved in implementing the PDL program. Meanwhile, as PDL program planners have taken on the role of team leaders, they become a “bridge,” communicating the CMSI message from the OMS director and managers to OMS facilitators.

Continuities and changes in supports for PDL roles. In terms of this year’s supports for prospective and new PDLs, stakeholders did not identify changes in the *nature* of the support provided. Rather, they described changes in who provides the support, with the primary shift being from facilitators to experienced PDLs. In terms of possible improvements in the support of PDLs in the future, one stakeholder commented that “we do a very good job at supporting the learning of the content and the pedagogy as well as we could,” and proposed that to do so would require the support of university partners. Another support for new PDLs some stakeholders mentioned as needing improvement was that of the reflection process, which they hoped to refine for this year’s Academy and PD provision activities.

Stakeholders indicated a need to provide additional support to experienced PDLs and to facilitators. Interestingly, one way in which the PDL program seeks to support experienced PDLs is to engage them *as supports* to newer PDLs and as Level 2 professional development providers, thereby offering them a greater leadership role and the chance to improve their skills and knowledge. The other kinds of support stakeholders described wanting to provide experienced PDLs was through meetings where they could receive additional professional development, and through more time for reflection with facilitators around their experiences and needs. Stakeholders also identified meetings focused on program management skills and time for reflection as an important support for facilitators and program planners. However, as noted in Section 2.b.a, while meetings for PDLs, facilitators, and program planners were budgeted into the PDL program for this year, it has been difficult to hold the meetings on regular basis due to challenges of time and scheduling.

PDL roles within the structure of OMS. It is apparent from stakeholder discussion that the various PDL program roles are inter-connected and affect each other. One stakeholder characterized this chain of transformations as follows: “the role of facilitators has shifted from being bridges into the schools to being program managers and, as a result, being more bridges to the PDLs or in-school specialists, who are in turn bridges to the schools.” This characterization of the PDL and PDL planner roles as “bridges” is a useful metaphor for thinking about the broader structure or framework within which these roles are

located. It suggests a sequence of bridges linking different elements of math/science education – OMS managers are bridges from the director and other CPS offices to the facilitators, communicating the CMSI message and supporting the facilitators as program managers (in this case as managers of the PDL program); the facilitators are bridges from OMS to the PDLs (and in-school specialists), communicating the CMSI message/goals and supporting them in their work with other teachers and in their schools; the PDLs are then bridges between OMS and the schools. Given the changes in the PDL role that are being initiated this year, such as the provision of PD at the Area level, one can see how the PDLs also function – along with area coaches – as bridges to the Areas.

Reflection Questions

- As new positions emerge within the PDL program and others are redefined, how will these new roles be formally defined, and by what process?
- Given the multiple shifts and transformations in key PDL program roles, what information is being gathered or could be gathered to determine whether these new roles are effective in contributing to the short and long-term goals of the program?
- As PDL program roles are redefined, how will OMS continue to offer supports for PDLs, facilitators, and planners that are appropriate to their developing roles?

B.2.d. Standardization of the PDL program across Math and Science

Rationale for standardization. The goal of standardizing key aspects of the PDL program across Math and Science has been a focus of the PDL program since last year, if not earlier. Moreover, as mentioned in subsection B.2.a., all stakeholders identified increasing standardization as a short-term goal for this year. While the evaluators did not explicitly ask stakeholders to elaborate on *why* standardization is so important, or how it relates to the program’s theory of change (a facet of the program logic model that we plan to explore further with program planners), stakeholders have identified the importance of consistency in the expectations *and* supports for the PDL role across both sides of OMS. One stakeholder described this as part of a “common road map” for Math and Science. This year, another reason for standardizing the role was mentioned by one stakeholder who commented that, while to date most PDLs are trained in either Math or Science, it is hoped that in the future more PDLs will receive training to provide professional development in both Math and Science.

Program areas being standardized. Stakeholders identified efforts at standardization across nearly all facets of the PDL program, including: the recruitment process and the criteria for participation in the PDL Academy; the PDL role and requirements for certification; the PDL Academy, including content and format; and the nature of supports for PDLs. Perhaps the one area in which standardization has not been emphasized is around the content and use of tools for training, support, assessment, or reflection. While stakeholders are in agreement as to the importance of internal assessment and reflection, there has not been an effort to date to standardize actual tools or processes. The exception is the PDL Blueprint, which the Math and Science planners are working on standardizing (see subsection A.2.b. of this report).

Program areas not being standardized. All stakeholders recognized that there were certain aspects of the PDL program that did not warrant standardization, or that simply could not be standardized – areas in which Math and Science have “agreed to disagree,” as one stakeholder put it. For instance, while there continues to be a concerted effort on the parts of both Math and Science to bring their PDL Blueprints into alignment – particularly the number of minimum hours required for certification and the goals relating to knowledge and skills – it was acknowledged during interviews and technical support sessions that the activities each side deems acceptable for completing specific goals may continue to differ. While

the Math and Science Blueprint goals as currently written differ to some extent, it is possible that ongoing work on those goals with the PRAIRIE evaluators may lead to greater consistency.

Another area of difference in which the two sides have agreed to differ is in the structure of the PDL Academies. Math has consistently organized its Academy as a series of three-hour sessions that take place over several weeks, with a week's break between sessions. By comparison, the Science PDL Academy takes place over two-and-a-half days in a row. (According to stakeholders, the structure of the Math Academy is intended to allow participants to read additional materials and prepare presentations between sessions. The evaluators have yet to gather information regarding the rationale for the Science Academy's structure.)

The other areas that seem to resist standardization, at least in the short term, are the result of differences in structure or subject matter. One example is the training process for new PDLs. Where Science takes prospective PDLs through a three-step process of observing PD, co-planning and co-facilitating PD, and then facilitating PD, Math "needs more qualified people to jump right in" for the summer PD, because they offer so many more professional development sessions than does Science. (One stakeholder estimated that Math offers four or five times as much professional development as does Science.) The significantly larger quantity of professional development sessions offered by Math is due primarily to the greater number of schools, and thus teachers, using CMSI supported math programs across the district, compared to science – related perhaps to the greater emphasis across the elementary grades on improving math instruction and student outcomes, compared to science.

Because of differences in the structure and content of curricular programs in Math and Science, the structure and extent of professional development provided by PDLs on each side is also necessarily somewhat variable. As one stakeholder noted, "with mathematics there is a lot more to cover than there is with science. For Mathematics PDLs, you are talking about a whole year of professional development. With science you are talking about one kit."

Standardization through borrowing. One mechanism by which the PDL program is moving toward greater standardization occurs when one side borrows processes from the other. (Based on stakeholders' identification of the role of the final evaluation report in informing Math and Science PDL program leaders about differences in their activities, it appears that formative evaluation has played a key role in facilitating this process of borrowing.) Below are two examples of how one side has been influenced by the other, leading to greater comparability.

Academy focus on adult learning – Math learns from Science: Last year, the Science Academy included extensive focus on adult learning in its opening presentations as well as its workshops, while the Math Academy interspersed the topic of adult learning more casually throughout. This year, the Mathematics planners structured their PDL Academy to include a keynote speaker who would focus explicitly on adult learning. They also decided to address the topic more extensively during the workshop sessions.

Experienced PDLs as mentors – Science learns from Math: As mentioned in the previous subsection on program roles, there is considerable consistency across Math and Science in their broad expectations of PDLs. Nonetheless, there has been a notable difference in ways in which each side draws on its facilitators and experienced PDLs as supports. Specifically, Math has created a support structure in which PDLs support each other, and experienced PDLs generally mentor new PDLs through the process of developing PD sessions; whereas on the Science side facilitators have tended to provide that support. This difference is due in part to issues of scale, in that Math does not have an adequate number of facilitators to support its far greater number of PDLs compared to Science.

While Science will continue to employ facilitators as supports for new and experienced PDLs in planning and providing PD, this year Science is planning to adopt some aspects of Math’s approach, using experienced PDLs as supports for new PDLs. The expressed purpose of adopting this strategy of supports is to provide experienced PDLs with additional leadership roles, as a means of supporting their professional growth and retention in the program.

Standardization within Mathematics. Whereas last year the focus of discussion among stakeholders was on standardizing the PDL program *across* Math and Science, this year, the issues of standardization also came up as an issue *within* Math. While this issue has not been explored in depth by the evaluators to date, it appears that PDL program planners are considering the usefulness of creating more coherence across Math curricula. One stakeholder identified three areas of potentially greater coherence: the processes for training PDLs, the overall message, and “the tools that we offer and the resources we have to support our PDLs. So for example, reflection tools or assessment tools for our program ... we could use similar tools to help support our PDLs.”

Reflection Questions

- In terms of the PDL program’s logic or theory of change, are the rationales for standardization of the PDL program sufficiently explicit? Would it be useful to make them more explicit?
- Beyond the examples described above, are there other program areas in which Math and Science might benefit from borrowing processes from each other?
- In terms of those aspects of the PDL program that have not been standardized (such as the different organization of the Academies, or different uses of experienced PDLs as supports), what kinds of information can be gathered in order to determine how effective each approach is in relation to its stated goals?

B.2.e. Sustainability of the PDL program: focus on retention of PDLs

As is apparent from the wording of the PDL program’s long-term goal, OMS considers sustainability to be central to the program’s implementation and theory of change. In interviews and meetings, stakeholders described sustainability of the PDL program in two ways. In the first place, they described the need for efforts aimed at retention of the current pool of PDLs (a focus on the PDLs). In the second place, they talked about sustainability in terms of supporting a series of key program activities, each of which is dependent on continued allocation of resources of time, funds, and personnel (a focus on the program). In this subsection, we focus primarily on issues of PDL retention and changes in the program’s scope, as those are related to sustainability.

Before taking up that specific aspect of sustainability, we begin by briefly addressing broader, programmatic issues that affect the PDL program’s sustainability. We will return to these issues more comprehensively in the final report.

Consistent vision and internal capacity development. Within the overarching concern for continued funding, stakeholders made a connection between the PDL program’s sustainability and its alignment with the district’s vision, especially in light of significant changes in CPS’ leadership. Some stakeholders commented on the importance of moral support and consistency of vision across levels as key elements of the program’s sustainability. One stakeholder characterized the process of vision-sharing as linear and top-down. In that case, each level is responsible for “conveying the vision,” ensuring all tangible and other forms of support are available, and monitoring progress for those they supervise. Other stakeholders spoke of the need to maintain and expand networks at every level to foster system-wide coherence. For instance, one commented that, ideally, the program would become less centralized and focused on

listening to the professional development needs of areas and schools. This bimodal theme appeared in discussions about the development of internal capacity, which involved refinements to the roles of personnel (covered in greater depth in the earlier subsection on roles in this report), efforts to retain the current pool of PDLs, and the refinement of tools and structures.

Tied to the program's vision and provision of resources, internal capacity development was a recurring theme in stakeholder interviews with regard to sustainability. The process of internal capacity building presents a set of overlapping tensions between efforts to refine the current PDL program and adapt the PDL program to an ever-shifting playing field. At once, the PDL program is continually stretched in an attempt to cover more areas and curricular materials while it has also shifted in response to changes in vision, resources, and, perhaps most importantly, increased complexity of the program. This refinement has taken the shape of roles, processes, and formalized supports and tools while complexity has led to the need for new and modified roles of facilitators and PDLs, as is described below.

Management of the PDL program and its impact on roles. It appears that efforts to increase sustainability have led to changes in roles. With increased demands on planners and facilitators, stakeholders noted emergent roles that adjusted existing ones. For instance, as described in the subsection on recruitment, facilitators were less able to visit the classrooms of all prospective recruits. Furthermore, one stakeholder noted that there is need for the management team to have the capacity to coordinate efforts district-wide and to sense the needs of schools. Others felt that the facilitators' role should include fostering a community of PDLs. The notion that these PDL leaders are being spread too thin led to suggestions for improvement. One stakeholder commented, "We're supporting each other and I feel that there's got to be at times another layer in certain areas to help us support our experienced PDLs more." This was especially so in relation to sustaining the current pool of PDLs.

Challenges to sustaining the pool of active PDLs. Stakeholders felt that internal capacity-building efforts were fruitful in refining the PDL program's structures, building the cadre of qualified PDLs, and refining tools. However, they also expressed an ongoing concern about turnover at various levels, especially of experienced PDLs. Stakeholders noted that more experienced PDLs were particularly at risk of attrition. They attributed this to the lack of adequate support for experienced PDLs, compared to the regular support that newer PDLs receive. As they commented on difficulties related to retaining currently active PDLs, stakeholders seemed to share a common desire to help teachers grow professionally by "deepening their understanding or knowledge ... and not just providing a service for us when they come to Medill to do PD." Stakeholders linked this desire to an overall improvement that would have a notable impact "down the road with the students in the district." However, several stakeholders pointed out that support for PDLs' professional growth also opens opportunities for them to take on additional roles. In this sense supporting PDLs as a mechanism for retention can have the unintended consequence of leading them to move on. Several stakeholders noted that teachers who become PDLs typically possess dispositions that make them attractive to other leadership positions. Many have become principals and assistant principals or have joined the ranks of other coaching efforts in the district.

In addition, some stakeholders pointed out that OMS, itself often draws from the same pool of highly-qualified teachers (i.e., active PDLs) to provide other services. This practice, in turn, limits those teacher leaders' ability to function as PDLs. Stakeholders also described a tension that arises between encouraging or supporting teachers to become certified, endorsed, or otherwise complete advanced work, and meeting the demands of the PDL program. As some of the stakeholders pointed out, as more PDLs become leaders, which disperses content and pedagogical knowledge widely throughout the district, the prospect of their work in other areas is hampered.

Also affecting efforts to sustain the current pool of active PDLs are cases in which teachers change schools or grade levels. In such situations, there is a threat that the teacher will no longer be using the same curricular materials for which they were certified as PDLs. Stakeholders noted that this is especially problematic when a teacher moves from primary (K-5) to middle (6-8) grades or vice versa, since the curricula are different at the new grade levels.

Efforts to sustain the pool of existing PDLs. Stakeholders identified several ways in which the program does or plans to provide additional support for experienced PDLs, including: differentiated PD sessions, boosting the prestige, interaction, and engagement of existing PDLs through such activities as planning (e.g., reviewing pacing guides), and the establishing of a professional community that allows PDLs to network. Stakeholders noted the importance of seeking the input of active PDLs in terms of both programmatic issues, as well as the needs of PDLs as a way to keep them engaged and feeling valued. Notably, these changes in existing supports and the development of new ones has impacted and reframed the roles of facilitators as they strive to support existing PDLs through efforts to needs sense, invite input on program structures, and facilitate the development of a “community” of PDLs.

Reflection Questions

- In terms of sustainability, should the vision of the PDL program be decided at one level or by stakeholders representing multiple levels?
- Although turnover is inevitable, what structures need to be in place to manage that turnover strategically?
- How is information about reasons underlying PDL retention and turnover gathered and by whom?
- How will efforts to formalize the program’s sustainability be monitored and assessed?
- To what degree should efforts to retain active PDLs be formalized? More generally, will the development and formalization of tools, processes, and roles enhance or restrict the program’s ability to be adaptive?
- If most PDLs who leave the program continue to be champions of math and science within the district and have the potential to serve as advocates and recruiters for the PDL program, to what extent is the program’s sustainability tied to addressing attrition? In other words, is attrition necessarily problematic, in light of the broader goals of OMS and the District?

APPENDIX A

Comprehensive Annual Report: Proposed Outline

Section	Subsections	Summary of Content
<u>A: PDL Program Developmental Evaluation</u>	<u>A.1. Program Templates</u> A.1.a. PDL Program Logic Model A.1.b. PDL Blueprints <i>Reflection Questions</i> <u>A.2. PDL Program Documentation, Assessment, and Reflection Tools</u> A.2.a. Academy Tools A.2.b. PD delivery tools: guidelines, assessment tools, PDL reflection tools <i>Reflection Questions</i>	<u>Descriptive content:</u> <ul style="list-style-type: none"> • Narrative description of process of generating and refining PDL program logic model, PDL program Blueprints, and assessment and reflection tools. • Presentation of completed program templates, including worksheets with elaboration of logic model components, including; long-term program goals and vision; short-term goals; key activities; internal monitoring and assessment processes; narrative of development of program design. <u>Evaluative content:</u> <ul style="list-style-type: none"> • Issues of coherence and consistency among facets of the program; quality of the program’s theory of change, including accuracy of the model’s assumptions and rationale; feasibility of the program in light of identified supports and challenges.
<u>B: PDL Program External Evaluation</u>	<u>B.1. Methodology</u> <u>B.2 Findings, Analysis and Reflection Questions</u> B.2.a. Long-term and short -term program goals B.2.b. Key Program Activities -Recruitment -PDL Academy -Summer professional development - PDL retention activities -School-year PDL activities B.2.c. Program roles and supports B.2.d. Standardization of the PDL program B.2.e. Sustainability of the PDL Program	<u>Descriptive content:</u> <ul style="list-style-type: none"> • Description of implementation of key program activities of recruitment, PDL Academy, summer PD provision; PDL retention activities; planned school-year PDL activities for 2009-10. • Description of use of documentation, assessment and reflection tools to track quantity and quality of key activities. <u>Evaluative content:</u> program development, coherence, and feasibility; standardization; role definition, development and supports; quality of PDL training and supports; program sustainability
<u>C: Appendices</u>	<u>C.1. PDL Program Templates</u> <ul style="list-style-type: none"> • Completed PDL program logic model and worksheets; • Revised PDL Program Blueprints; • Assessment and Reflection tools <u>C.2. Evaluation Data Collection Instruments</u>	

APPENDIX B

PDL Program Stakeholder Interview Protocol Prepared by Prairie Group – 2008-09 External Evaluation February 22, 2009

Part 1: Overview questions about the PDL program

Goals

- a) What are the broad or long-term goals of the PDL program?
 - How do these program goals relate to the aims of the CMSI?
 - How do they relate to the priorities of the District?
- b) What are the short-term goals that the PDL program has for this academic year?
- c) To what extent is the PDL program meeting its expected goals?
[prompt for in what ways, examples of how or how not]
- d) What factors support or constrain the PDL program's ability to achieve its goals?
[prompt for Office level; District level]

Program Roles

- a) What is the role of the PDLs? How do they fit into the structure of CMSI leadership?
- b) Has the PDL role changed since the program began? If so, in what ways, and for what purposes?
- c) What is the role of the PDL planners? How do they fit into the structure of CMSI leadership?
- d) Are there any other roles that are key to the PDL program?
[if they identify any, prompt for how those roles contribute to program's goals]

Standardization of the PDL program across Math and Science PDLs

- a) What is your view the goal of standardizing the PDL program across the math and science sides of OMS?
[prompts for pros, cons, feasible, etc.; prompt for standardization around specifics about the program: the PDL certification process; the PDL's role]
- b) (i) *[If the interviewee accepts or supports standardization]* What kinds of steps need to be taken to achieve this standardization?
(ii) *[If the interviewee disagrees with standardization]* How would you structure the program?

- c) Are there any ways in which you think that the math and Science sides should remain different? If so, why?

Part 2: Components of the PDL program

PDL Recruitment

- a) “What is the PDL recruitment process?”
[Prompt: How are new PDLs recruited into the program]
- b) What is your assessment of the current PDL recruitment process?
[prompts: What are the strengths of the current PDL recruitment process? What are the limitations?]
- c) What supports are in place for effective PDL recruitment?
- d) What are the challenges to effective PDL recruitment?
- e) Are the processes for recruitment similar or distinct across Math and Science?
[Note that interviewee may not be able to speak about both sides]

Training and Support of PDLs

- a) What is the process by which prospective PDLs are trained to deliver PD?
[Prompts: what are the areas in which the training program is most effective? where could it be improved?]
- b) What supports do new PDLs receive as they move toward certification? What do you think about these supports?
[prompts around whether the supports are adequate, effective]
- c) How are PDLs supported once they’ve been certified? What do you think about these supports?
[Prompt around whether the supports are adequate, effective]
- d) What is your view of the ways math and science train and support their PDLs?
[If interviewee knows both sides, prompt around similarities and differences]

Monitoring and Assessing Quality of the PDL program

- a) In what ways is the PDL program being monitored internally? *[Prompt: what kinds of data are being collected, and by whom?]*
- b) Is the information that is gathered about the program being used to inform program practices?
[Prompt for examples: If so, How? If no, prompt for examples of how it could be used]

- c) What kinds of supports are there for doing regular program monitoring?
- d) What kinds of challenges are there for doing regular program monitoring?

Part 3: Sustainability

- a) What is key to the sustainability of the PDL program?
[Prompt: Are there particular contexts within OMS or CPS more broadly that create supports for or challenges to the sustainability of the PDL program?]
- b) What processes and supports are being used to facilitate the program's sustainability?
- c) Who participates in the program's sustainability? In what ways do they participate?
[follow-up if need clarity: what are the groups that have a role in the future of the program?]
- d) What are the challenges to the PDL program's sustainability?